



A Tourism Industry, Market and Consumer Research Study

Final report prepared for the Western Regional Tourism Partnership

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12 February 2009

Dear Elaine

We have pleasure in presenting our draft report from research with visitors to the Western Regional Tourism Area of Northern Ireland during 2008.

We have enjoyed working with you on this project and hope that you have found the findings beneficial.

If you require any further information please do not hesitate to give me a call.

Warm regards

Maureen Treacy

Maureen Treacy
Managing Director

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1. Executive summary

Introduction

The Western Regional Tourism Partnership (WRTP) is a virtual regional tourism partnership consisting of seven local councils situated in the West of Northern Ireland (representing the counties of Fermanagh, Londonderry and Tyrone). The WRTP commissioned Perceptive Insight Market Research to carry out a research study to assess consumer's views of the Region's tourism product offering and experience, and visitors' perceptions of the area as a destination.

Our approach

Perceptive Insight interviewed visitors at 37 sites chosen by the WRTP across the Western Region. 90 days of interviewing occurred at these sites between the 18th July 2008 and 11th September 2008 with additional interviewing occurring on three days over Halloween 2008. In total 1407 interviews were achieved, with 47% completed by domestic visitors and 53% by out-of-state visitors.

Completed questionnaires were coded and entered, providing a preliminary list of results which were presented to a stakeholder group in each county of the region.

The key findings from the study are outlined under the following headings:

- Who visits the Western Region?
- About the visit;
- Overnight stays;
- Visitor spend; and
- Perceptions of the region and venues.

Who visits the Western Region?

The profile of visitors to the region indicates that it has broad appeal across ages and gender.

Among domestic visitors it has particular appeal to women, those aged 35 to 55, and those classed as socio-economic groups ABC1. It is worth noting that 43% of domestic visitors travelled with children and young people aged under 18. Also over half (54%) had travelled more than 30 miles to visit the venue.

While just over one third of domestic visitors travelled in pairs, this increased to 46% for out-of-state visitors. However most visitors were travelling as part of a larger group. Out-of-state visitors were less likely to travel with children and young people aged under 18 (23%) although this still made up almost one quarter of all parties.

About the visit

Domestic visits are dominated by daytrippers (78%), while 56% of out-of-state visitors chose to stay overnight.

The majority of visits are conducted by car which allows a degree of flexibility over the destinations visited. Not surprisingly a higher proportion of out-of-state visitors than domestic visitors travel by coach, bus, train or on-foot (28% vs 10%).

As part of the visit there appeared to be a limited amount of travel within the region among domestic visitors. However, almost one third of those out-of-state visitors interviewed in Co Tyrone were planning trips to the other counties, and 18% of those interviewed in Co Fermanagh were visiting Derry and 10% of those in Co Fermanagh visiting Derry. Although

many within the workshops expressed the view that there was limited travel within the three counties of the region and that the infrastructure did not support this, some out-of-state visitors appear to be widening the scope of their trip.

The most effective marketing tool for the region appears to be 'word of mouth'. This emphasises the need for maintaining visitor satisfaction and to create visit itineraries that give visitors something to talk about. Out-of-state visitors also rely on brochures, tourist information centres and tour guides to inform their trip. Surprisingly few mentioned the internet as a source of information. However it must be questioned whether this is due to a lack of using the internet or not being able to find the information they need on it.

Walking was the most popular activity undertaken during the visit. However at the workshops the point was made that it would be beneficial to distinguish between serious walkers and those who undertake it as part of their overall visit to a site. Museums, historic properties and country, forest and garden parks were also popular among visitors. One in 10 had planned sport as part of their visit.

Overnight stays

Of those staying in the region most visited for two to four nights. The stays of out-of-state visitors tended to be longer than domestic visitors. Only 4% of domestic visitor planned to stay for 5 days or more compared to 18% of out-of-state visitors.

Among out-of-state visitors both hotels (34%) and B&Bs (26%) were popular and 15% stayed with family and friends.

Although 29% of domestic visitors used hotels, 21% stayed in self-catering accommodation and 17% in caravans/motorhomes.

Overall the perceptions of the standard and availability of accommodation was good. This was particularly the case for those visiting Co Fermanagh and Co Tyrone.

Visitor spend

Not surprisingly those staying at least one night were more likely to have a higher level of spending than day trippers. Data presented previously shows that out-of-state visitors are more likely to stay overnight and therefore will have higher levels of spend compared with domestic visitors. Indeed when the figures are analysed further, the spend of out-of state daytrippers is more than domestic daytrippers.

Perceptions of the region and venues

Perceptions of the facilities within the region are very positive with respondents being particularly complimentary about the helpfulness of staff – 62% rated them as very good. Also 49% of out-of-state visitors and 34% of domestic visitors would speak highly of the region without being asked (43% and 51% respectively would speak highly *if asked*).

The aspects of the area which contributed to the positive views were the scenery, the people and the activities.

In relation to areas for improvement this focused on sign-posting, toilet facilities and availability of car parking. Indeed a point that was made very strongly at the workshop in Derry was the requirement for toilets that could accommodate the needs of visitors travelling by coach and in particular those arriving on a Sunday morning.

Respondents were also very positive about the venues they visited with 54% of out-of-state visitors and 45% of domestic visitors saying that they would speak highly of them without

being asked. Of particular note is the Tower Museum, where 88% of those interviewed there said that they would speak highly of it without prompting.

Overall comment

Overall, the results highlight some key findings. Strengths of the region are the tourist product in relation to its scenery, its people and the activities on offer.

Improvements however, could be made in relation to signposting, toilet facilities and car parking.

Of note throughout the workshops is the lack of cohesion between the various stakeholders within the virtual region. It is worth exploring further how to harmonise activities between each of the key players.

The results, along with comments from the workshops and the analysis in this report provide an excellent starting point from which the Partnership can decide their strategic way forward.

2. Introduction

The Western Regional Tourism Partnership (WRTP) is a virtual regional tourism partnership consisting of the district council authorities of Cookstown, Dungannon & South Tyrone, Fermanagh, Magherafelt, Omagh and Strabane, as well as Derry City Council. These seven local authorities, situated in the West of Northern Ireland, work alongside existing tourism agencies within the region including Derry Visitor & Convention Bureau, Fermanagh Lakeland Tourism, Flavour of Tyrone, Sperrins Tourism Limited, and Tyrone Tourism.

The WRTP, in conjunction with the Northern Ireland Tourist Board, is responsible for the delivery of a business and tactical action plan over the 2007-2008 period. This plan includes product development and industry capabilities activities, and the delivery of a marketing plan targeting the region to international markets and consumers, along with a key focus on the domestic and Republic of Ireland markets.

The WRTP sought qualified and experienced consultants to carry out a tourism industry, market and consumer research study in the Western Region, as a core element of this business and tactical action plan. Perceptive Insight Market Research (PIMR) was commissioned to undertake this work.

The aim of the study was to assess consumers' views of the Region's tourism product offering and experience, and visitors' perceptions of the Region as a destination.

The results of this study will be used to help implement the explicit goals of marketing, development, and leadership in the WRTP's strategy. Specifically with this commission, the WRTP hopes to use the outcomes to ensure that appropriate and relevant tourism products, services, and the quality and accessibility of the Region's visitor experiences are developed to a standard that can effectively compete and consistently deliver quality and value to the market. The WRTP seeks to influence the development of enhanced tourism business capacity and sustainability in the Region, to be market-led and to ultimately generate more visitors, encourage them to stay longer, and to stimulate real economic impact for the region.

3. Our approach

In this section we have identified the key steps that were undertaken in the implementation of this project.

The study area

The focus of the study was the Western Regional Tourism Partnership area, representing the three Counties of Derry, Fermanagh and Tyrone, taking in the seven local council areas of Cookstown District Council, Derry City Council, Dungannon and South Tyrone District Council, Fermanagh District Council, Magherafelt District Council, Omagh District Council and Strabane District Council.

Sample design

The WRTP project team provided a list over 40 venues across the region which were selected for interviewing to take place. During the interviewing it became apparent that low numbers of interviews were being achieved at a small number of venues due to lack of footfall. Rather than continue to interview at these venues, a number of festivals and events that were taking place in the region were identified and interviewing was organised at these instead. To obtain a wide range of views interviewers were instructed to interview one person only within a party of visitors.

The aim was to achieve half the interviews with domestic visitors and half with out-of-state visitors, although it was recognised that the ability of interviewers to do this would depend on the profile of visitors attending the venues and events. In total 1407 interviews were achieved; 47% with domestic visitors and 53% with out-of state visitors.

Questionnaire design

PIMR drafted a questionnaire to elicit information on the visitor profile, the reason for the visit, length of stay, amount spent during the visit and perceptions of the venue and region. The questionnaire took approximately 7 minutes to administer.

Survey implementation

90 days of interviewing took place between the 18th July 2008 and 11th September 2008, with three additional days of interviewing taking place over Halloween 2008.

The data from the completed questionnaires were entered on to computer. Open-ended questions were coded in preparation for analysis.

Analysis and reporting

A set of cross-tabulations was run detailing the response to each question by key breaks including domestic and out-of-state visitors, the county where the interview took place as well as gender, age and socio-economic group.

The key findings from the survey were presented to three stakeholder workshops which were held in each of the counties of the region. This was followed by a discussion around the key strengths and weaknesses of the region as a tourist destination.

This report presents the key findings from the survey and workshops. They are reported under the following headings:

- Who visits the region?;
- About the visit;
- Overnight visits;
- Visitor spend; and
- Perceptions of the region and venues.

4. Who visits the Western Region?

In this section we look at the characteristics of those who visit the Western Region. We profile both domestic and out-of-state visitors, detailing their age, gender, socio-economic group and party-size and identifying any difference in the demographics of those who visit each of the counties within the region.

Profile of domestic visitors

Of the total 1,407 visitors who were interviewed, 656 (47%) resided in Northern Ireland. In comparison with the overall demographics of Northern Ireland, visitors from the region were more likely to be aged 35 to 54, female and in the ABC1 socio-economic group (Table 4.1).

Table 4.1: Profile of domestic visitors by key demographics

Demographic		NI population	Percentage of NI visitors (n=656)
Age	16 to 34	34%	27%
	35 to 54	35%	48%
	55 plus	31%	25%
		100%	100%
Gender	Male	48%	43%
	Female	52%	57%
		100%	100%
Socio-economic group	ABC1	47%	59%
	C2DE	53%	39%
Total		100%	100%

Table 4.2 shows the distance travelled by domestic visitors to the venues. The majority (54%) had travelled more than 30 miles to attend the venue.

Table 4.2: Profile of domestic visitors by distance travelled to venue

Distance travelled to venue	Percentage of NI visitors (n=656)
Less than 30 miles	46%
Greater than 30 miles	54%
Total	100%

It is interesting to note some variations in the domestic visitor profile depending on which county the respondent was visiting. Table 4.3 shows a comprehensive profile of domestic visitors by county (Derry City is also included in the table due to interest expressed through the workshops and the large number of visitors interviewed at venues in this area).

Co Fermanagh appears to attract the younger visitor with one third (33%) of its visitors being 16 to 34 years old compared to 27% overall. Fermanagh also has the highest percentage of male visitors (48%) compared to the other counties in the region (43% overall). On the other hand, Tyrone has the highest percentage of female visitors (61%) and ABC1 visitors (65%).

With regards to distance travelled, there was a sizeable difference between Fermanagh and the other counties with over two thirds of visitors (69%) to the area travelling more than 30 miles to get there. This is in contrast to the other areas where most visitors had travelled less than 30 miles to their venue.

Table 4.3: Profile of domestic visitors by place of interview

Demographic		Fermanagh (n=247)	LDerry (n=176)	Derry City (n=89)	Tyrone (n=233)	Total (n=656)
Age	16 to 34	33%	23%	28%	22%	27%
	35 to 54	46%	47%	42%	51%	48%
	55 plus	21%	30%	30%	26%	25%
		100%	100%	100%	100%	100%
Gender	Male	48%	43%	44%	38%	43%
	Female	52%	57%	56%	61%	57%
		100%	100%	100%	100%	100%
Socio-economic group	ABC1	56%	55%	40%	65%	59%
	C2DE	43%	41%	53%	33%	39%
	Not stated	1%	4%	7%	2%	2%
		100%	100%	100%	100%	100%
Distance travelled	< 30 miles	31%	58%	60%	52%	46%
	> 30 miles	69%	42%	40%	48%	54%
		100%	100%	100%	100%	100%

In terms of party size, the majority of domestic visitors travelled in parties of two (34%), three (17%) or four (19%) (Table 4.4). 14% travelled in party sizes of 6 or more, while 9% travelled alone.

Table 4.4: Profile of domestic visitors by party size

Party size	Percentage of domestic visitors (n=656)
One	9%
Two	34%
Three	17%
Four	19%
Five	8%
Six	5%
Seven to ten	5%
Eleven to twenty	2%
Twenty one to thirty	1%
More than thirty	1%
Total	100%

Overall 43% of domestic visitors travelled with children aged under 18 (Table 4.5). The predominant age group was five to 12.

Table 4.5: Percentage of domestic visitors travelling with children and young people

Age of children and young people	Percentage of domestic visitor parties with children (n=656)
Under five	16%
Aged five to 12	29%
Aged 13 to 17	3%
With any children under 18	43%

Profile of out-of-state visitors

A total of 751 interviews (53%) were conducted with out-of-state visitors. Of these, just over one quarter (26%) had travelled from the Republic of Ireland (Table 4.6). Among this group the majority (71%) had travelled over 30 miles to the venue.

28% of out-of-state visitors were from Britain. Of these the majority (80%) were from England and Wales, while 20% were from Scotland.

19% of out-of-state visitors had travelled from mainland Europe. 22% of this group had come from Germany, while just less than one third (32%) had travelled from France and Spain. The remaining 46% came from elsewhere in Europe.

Visitors from USA and Canada made up 17% of out-of-state visitors, while 10% had travelled from outside Europe and North America.

Table 4.6: Profile of out-of-state visitors by country of origin

Origin	Specific region	Percentage of OOS visitors (n=751)	
Republic of Ireland	<30 miles	29%	26%
	>30 miles	71%	
	Total	100%	
Great Britain	England/Wales	80%	28%
	Scotland	20%	
	Total	100%	
Mainland Europe	Germany	22%	19%
	France/Spain	32%	
	Rest of Europe	46%	
	Total	100%	
North America			17%
Elsewhere			10%
Total			100%

The age profile of out-of-state visitors is interesting in that the region attracts visitors across all age groups. While just over one third (35%) were age 35 to 54 and another third (35%) aged 55 plus, 29% were younger visitors aged 16 to 34 (Table 4.7).

The gender of out-of-state visitors was quite evenly split with 49% male and 51% female.

Just less than three quarters (74%) of out-of-state visitors were classed as socio-economic group ABC1. This is perhaps not surprising as this group tends to have more disposable income for travel.

Table 4.7: Profile of out-of-state visitors by key demographics

Demographic		Percentage of OOS visitors (n=751)
Age	16 to 34	29%
	35 to 54	35%
	55 plus	35%
		100%
Gender	Male	49%
	Female	51%
		100%
Socio-economic group	ABC1	74%
	C2DE	21%
	Not stated	5%
		100%
Total		100%

Table 4.8 provides a breakdown of the demographic profile of out-of-state visitors by the country they have travelled from.

On average those travelling from GB and North America tended to be older (aged over 55), while those travelling from Mainland Europe tended to be younger (under 35). The age profile of those travelling from ROI was spread across each of the age groups. However a sizeable minority (43%) were aged 35 to 54.

The gender split was quite even for each of the places of origin apart from North America. Those travelling from USA and Canada were more likely to be female (61%).

In relation to socio-economic group, those travelling from Mainland Europe were most likely to have an ABC1 profile.

Table 4.8: Profile of out-of-state visitors by place of origin

Demographic		ROI (n=197)	GB (n=212)	Mainland Europe (n=142)	North America (n=124)	Total (n=751)
Age	16 to 34	36%	17%	47%	23%	29%
	35 to 54	43%	37%	37%	24%	35%
	55 plus	21%	45%	15%	52%	35%
		100%	100%	100%	100%	100%
Gender	Male	50%	51%	49%	39%	49%
	Female	50%	49%	51%	61%	51%
		100%	100%	100%	100%	100%
Socio-economic group	ABC1	67%	75%	82%	75%	74%
	C2DE	28%	20%	11%	19%	21%
	Not stated	5%	5%	7%	6%	5%
		100%	100%	100%	100%	100%

Just less than half of out-of-state visitors travelled in pairs (46%) (Table 4.9). While 8% travelled alone, 34% travelled in a small party of three, four or five. 12% reported travelling with six or more people.

Table 4.9: Profile of out-of-state visitors by party size

Party size	Percentage of OOS visitors (n=751)
One	8%
Two	46%
Three	14%
Four	14%
Five	6%
Six	4%
Seven to ten	4%
Eleven to twenty	1%
Twenty one to thirty	1%
More than thirty	2%
Total	100%

Overall 23% of domestic visitors travelled with children aged under 18 (Table 4.10). The predominant age group was five to 12.

Table 4.10: Percentage of out-of-state visitors travelling with children and young people

Age of children and young people	Percentage of oos visitor parties with children (n=656)
Under five	7%
Aged five to 12	14%
Aged 13 to 17	8%
With any children under 18	23%

5.About the visit

In this section we explore why both domestic and out-of state respondents visit venues within the Western Regional area, how they travel to the venue, the places they visit and the activities they undertake.

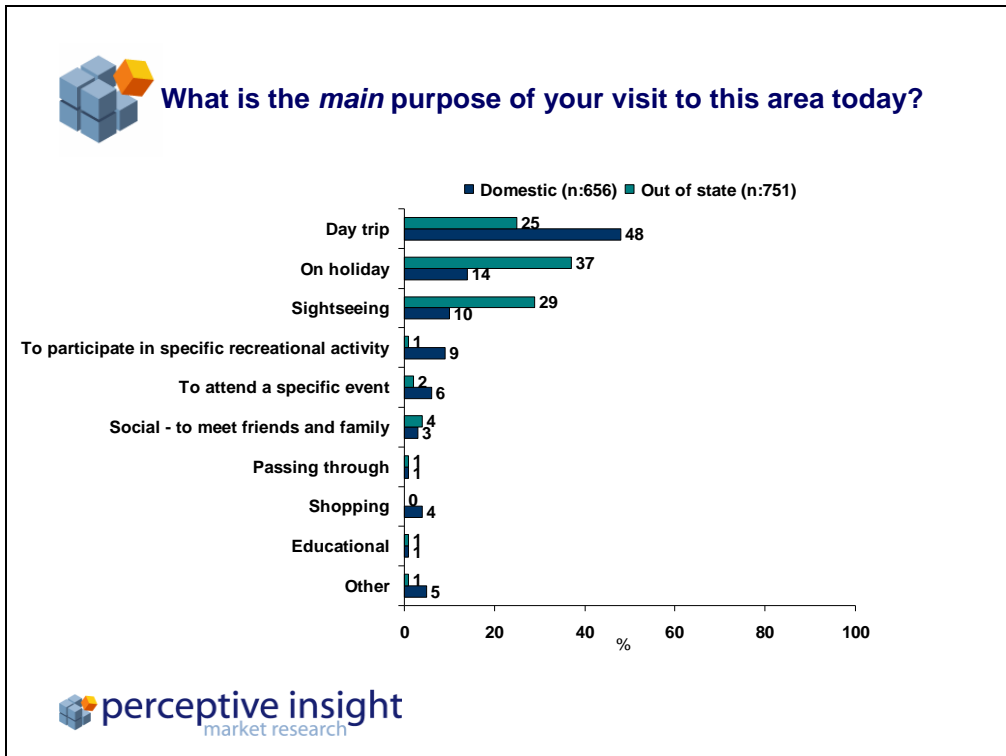
Main purpose of visit

The main reason for the outing varied by domestic and out-of-state visitors.

For domestic visitors the main reason for the visit was a day trip (48%), with a further 10% reporting that they were sightseeing (a number of sites) and 14% said that they were on holiday (Figure 5.1). Domestic visitors were also more likely to be attending a specific recreational activity (9%) or event (6%).

For those visiting from out-of-state, their reasons for being at the venue were more varied. While 25% said it was a day trip, 29% reported that they were sightseeing and 37% were on holiday.

Figure 5.1: Main purpose of visit

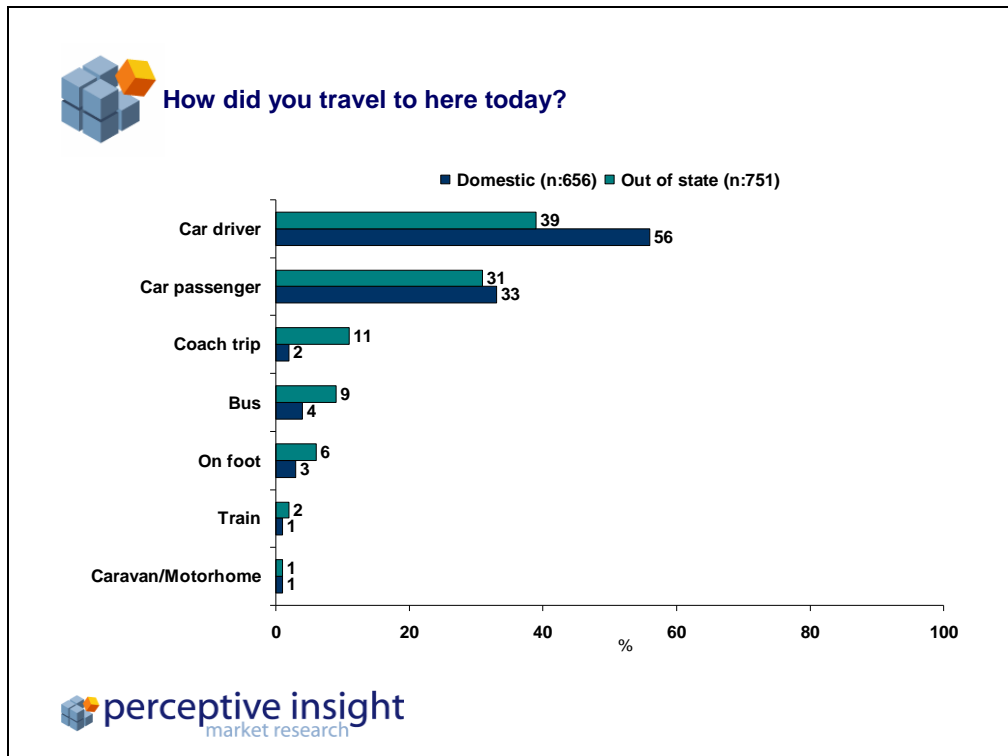


Method of travel

The most popular method of travel to venues was by car, with a total of 70% out-of-state, and 89% domestic visitors using this method. This is not surprising given the public transport infrastructure within the Western Regional area. However, this also means that many visitors are less constrained in relation to where they visit as they have flexible transport.

Coaches and buses were more popular among out-of-state visitors with 11% and 9% using them respectively. The least popular methods of travel by both domestic and out-of-state visitors were train (2% and 1% respectively), and caravan/motorhome (1% and 1% respectively).

Figure 5.2: Method of travel to venue



Places visited

The survey was conducted at 37 venues and events across the Western Regional area. To ensure achieving adequate numbers of interviews we targeted those venues which were known to have higher numbers of footfall of visitors. Unavoidably therefore this has influence over the results in relation to where respondents said they planned to visit. However to provide a better understanding of flow of visitors across the region we asked respondents about which other venues they planned to visit and have presented these based on the county where the interview took place.

Within Co Fermanagh the most popular venues for visitors were Marble Arch Caves (44%), Belleek Pottery (44%) and Lough Erne (39%) (Table 5.1).

Out-of-state visitors were more likely to visit each of the top three attractions than domestic visitors, although Marble Arch Caves attracted similar proportions of both. Out-of-state visitors also appeared to travel further afield during their visit with 16% saying they planned to visit or had visited the Ulster American Folk Park and 15% the Derry City Walls.

Domestic visitors were more likely to visit events such as Wakejam Festival and the Fermanagh Show compared to out-of-state visitors. They were also more likely to visit Florence Court House.

Table 5.1: Main attractions visited by those interviewed in Co Fermanagh

	Domestic (n=209)	Out-of-state (n=223)	Total (n=432)
Marble Arch Caves	42%	45%	44%
Belleek Pottery	35%	52%	44%
Lough Erne	33%	45%	39%
Florence Court House	33%	23%	28%
Castle Archdale Country Pk	12%	13%	13%
Ulster American Folk Park	7%	16%	11%
Derry Walls	0%	15%	8%
Enniskillen TIC	5%	9%	7%
Enniskillen Castle	6%	6%	6%
Wakejam Festival	9%	3%	6%
Fermanagh Show	11%	2%	6%
The Linen Green	1%	2%	2%
Peatlands Park	0%	1%	1%

In relation to the towns and cities visited by those interviewed in Fermanagh, not surprisingly three quarters (75%) had Enniskillen on their itinerary (Table 5.2).

Domestic visitors appear to travel less extensively than out-of-state visitors with 20% planning not to go to any other town or city as part of their visit. Apart from Omagh and Enniskillen few planned to visit any other town in the region.

On the other hand, 17% of out-of-state visitors planned to visit Omagh and 18% Derry. This shows a degree of travel across the region by out-of-state visitors.

Table 5.2: Main towns/cities visited by those interviewed in Co Fermanagh

	Domestic (n=209)	Out-of-state (n=223)	Total (n=432)
Enniskillen	77%	74%	75%
Omagh	8%	17%	12%
Strabane	2%	5%	3%
Derry	1%	18%	10%
Dungannon	1%	3%	2%
Magherafelt	1%	1%	1%
Cookstown	1%	3%	2%
Other	2%	0%	1%
None of the above	20%	14%	17%

Within Co Londonderry the main attraction was the City Walls (71%), followed by the Guildhall (24%) and the Tower Museum (20%) (Table 5.3).

Out-of-state visitors were much more likely than domestic visitors to visit or plan to visit Derry City Walls, the Guildhall, St Columb’s Cathedral and Museum of Free Derry.

Domestic visitors were more likely to visit Springhill House, Tyrone Crystal, Riverwatch Museum and events at Lough Neagh.

Apart from Tyrone Crystal and the Ulster American Folk Park there was little evidence of visitors to Co Londonderry travelling outside the county.

Table 5.3: Main attractions visited by those interviewed in Co LDerry

	Domestic (n=176)	Out-of-state (n=385)	Total (n=561)
Derry Walls	36%	87%	71%
Guildhall	8%	32%	24%
Tower Museum	18%	21%	20%
St. Columb's Cathedral	12%	17%	15%
Museum of Free Derry	6%	19%	15%
Springhill House	22%	3%	9%
Lough Neagh Triathlon, Ballyronan	14%	5%	8%
Walls Festival	2%	6%	5%
Tyrone Crystal Visitors Centre	13%	1%	5%
Riverwatch Museum	11%	1%	4%
Lough Food & Drink Festival, Ballyronan	10%	1%	4%
Ulster American Folk Park	2%	5%	4%

Visitors to Co Londonderry were asked also about the towns and cities they visited or planned to visit. Overall three quarters (75%) had Derry on their itinerary (Table 5.4). These visitors were more likely to be from out-of-state (85% compared to 55% of domestic visitors). 10% of out-of-state visitors also planned visits to Enniskillen and 9% to Omagh, again showing a degree of travel across the region among this group but not as extensive as those visitors to Fermanagh.

Table 5.4: Main towns/cities visited by those interviewed in Co LDerry

	Domestic (n=176)	Out-of-state (n=385)	Total (n=561)
Derry	55%	85%	75%
Enniskillen	3%	10%	8%
Cookstown	11%	4%	7%
Omagh	4%	9%	7%
Magherafelt	10%	3%	5%
Strabane	3%	3%	3%
Dungannon	3%	2%	2%
Other	3%	1%	1%
None of the above	24%	4%	11%

The main attraction among those interviewed in Co Tyrone was the Ulster American Folk Park (Table 5.5).

Among out-of-state visitors there appeared to be some propensity to travel with 26% planning trips to Derry Walls, 12% to Belleek Pottery and 8% to Lough Erne. Other attractions popular within the county were Barron Top Fun Farm, An Creagan Visitor Centre and the Linen Green.

In comparison domestic visitors were more likely to visit Drum Manor Forest Park, Killymaddy Tourist Centre and less likely to visit the Ulster American Folk Park, Derry City Walls and Belleek Pottery.

Table 5.5: Main attractions visited by those interviewed in Co Tyrone

	Domestic (n=271)	Out-of-state (n=143)	Total (n=414)
Ulster American Folk Park	36%	61%	45%
Barron Top Fun Farm, Donemana	14%	22%	17%
Drum Manor Forest Park	17%	1%	12%
Derry Walls	1%	26%	9%
An Creagan Visitor Centre	10%	8%	9%
The Linen Green	10%	8%	9%
Killymaddy Tourist Centre	8%	1%	6%
Alley Centre Strabane	5%	5%	5%
Belleek Pottery	0%	12%	4%
Lough Erne	2%	8%	4%
Tyrone Crystal	3%	3%	3%

Compared to visitors to the other two counties, those visiting Tyrone were much more likely to say that they did not intend to travel to any town or city as part of their travels (Table 5.6).

Among those travelling to cities and towns, domestic visitors were less likely to say they would be visiting outside the county. However, 23% of out-of-state visitors planned travel to Enniskillen and 31% to Derry. This is a higher proportion than for those visiting either Fermanagh or Londonderry.

Table 5.6: Main towns/cities visited by those interviewed in Co Tyrone

	Domestic (n=271)	Out-of-state (n=143)	Total (n=414)
Enniskillen	4%	23%	10%
Omagh	11%	42%	22%
Strabane	10%	19%	13%
Derry	2%	31%	12%
Dungannon	3%	5%	3%
Magherafelt	1%	1%	1%
Cookstown	12%	8%	11%
Other	4%	3%	3%
None of the above	54%	31%	46%

How they learnt of the venue

Respondents were asked how they had learnt or heard of the venue at which the interview took place. This information is of particular interest in relation to determining marketing activities for the region.

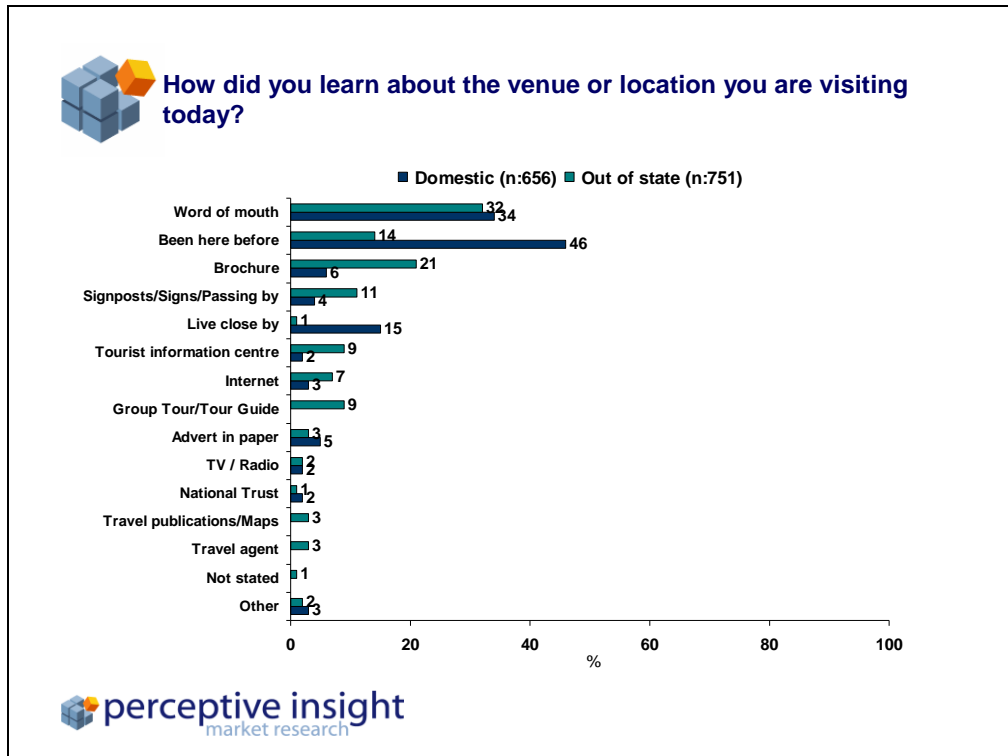
Just over one third of domestic visitors (34%) and almost one third of out-of-state visitors (32%) had heard about the venue by word of mouth, which is high in comparison to the other responses (Figure 5.3).

Not surprisingly 46% of domestic visitors had been to the venue before indicating a degree of repeat usage by domestic visitors. Indeed 14% of out-of-state visitors had attended the venue previously.

Among the out-of-state visitors there were also high usage of brochures (21%) and signposts/passing by (11%). They were also more likely to rely on tourist information centres and tour guides.

7% of out-of-state and 3% of domestic visitors had used the internet to find out about the venue. This appears to be quite low given the age profile of those visiting.

Figure 5.3: Method of learning about venue



Types of activities undertaken

The types of activities most undertaken by visitors included walking (54%), visiting museums and exhibitions (41%) and visiting historic properties (41%) (Table 5.7). Each of these were particularly popular among out-of-state visitors. Interestingly 31% of both domestic and out-of-state visitors were visiting a country park/forest park or gardens.

Approximately 10% reported they would be taking part in sports activities during their visit.

It is worth noting that interviewing took place at tourist venues and events and that town and city shopping areas were not targeted due to the difficulty of identifying visitors from those shopping. Therefore it is likely that the figures for those visitors shopping in the region are understated.

Table 5.7: Activities undertaken by visitors

Type of activity. Multi-response question therefore respondents allowed to choose more than one activity.	Domestic (n=656)	Out-of-state (n=751)	Total
Walking	45%	62%	54%
Visiting museums and exhibitions	25%	56%	41%
Visiting historic properties	26%	54%	41%
Visiting country park / forest park / gardens	31%	31%	31%
Attending a festival or event	15%	11%	13%
Visiting farm / animals	6%	3%	5%
Shopping	3%	3%	3%
Cycling	2%	3%	2%
Sailing / Boating	2%	2%	2%
Other water sports e.g. canoeing	3%	2%	2%
Fishing	2%	2%	2%
Golfing	1%	2%	2%
Horse riding / equestrian activities	1%	2%	1%
Other sports	1%	0%	1%
Other sightseeing / tourist information	1%	1%	1%
Climbing	0%	1%	1%
Other	2%	1%	2%
	100%	100%	100%

Interestingly those visiting Co Tyrone were less likely to say that they would be walking during their visit (Table 5.8). However, this may be influenced by the ratio of domestic to out-of-state visitors to this county who took part in the survey.

Those visiting Co Londonderry were more likely to have museums and exhibitions on their agenda compared to those visiting either Fermanagh or Tyrone.

Table 5.8: Activities undertaken by visitors by place of interview

Type of activity (Multi-response question)	Fermanagh (n=432)	LDerry (n=561)	Derry City (n=439)	Tyrone (n=414)	Total
Walking	64%	60%	64%	36%	54%
Visiting museums and exhibitions	26%	65%	76%	25%	41%
Visiting historic properties	44%	55%	59%	18%	41%
Visiting country park / forest park / gardens	37%	24%	22%	34%	31%
Attending a festival or event	7%	15%	7%	15%	13%
Visiting farm / animals	1%	0%	0%	15%	5%
Shopping	4%	1%	1%	5%	3%
Cycling	1%	4%	3%	2%	2%
Sailing / Boating	4%	2%	1%	1%	2%
Other water sports e.g. canoeing	3%	2%	1%	2%	2%
Fishing	4%	1%	0%	1%	2%
Golfing	2%	1%	1%	1%	2%
Horse riding / equestrian activities	2%	2%	1%	0%	1%
Other sports	0%	1%	1%	1%	1%
Other sightseeing / tourist information	0%	1%	1%	1%	1%
Climbing	0%	1%	1%	1%	1%
Other	0%	1%	1%	4%	2%
	100%	100%	100%	100%	100%

Gaps in activities

Those interviewed were asked what other activities could be made available, if any. 12% of respondents felt that activities were currently fine as they are, and a total of 69% did not respond to this question. However those that felt there were gaps in provisions suggested play areas, children’s park, things for kids (4%) and indoor activities for wet days (2%).

Table 5.9: Suggested additional activities for the area by visitors

	Domestic (n=656)	Out-of-state (n=751)	Total
Play areas, children's park, things for kids	6%	2%	4%
Indoor activities for wet days	3%	1%	2%
Horse riding	2%	0%	1%
Eating facilities (in parks)	2%	0%	1%
Water sports	1%	0%	1%
More fishing/activities/ competitions	1%	1%	1%
Swimming pool	0%	1%	1%
Other	11%	4%	7%
Activities fine as they are	10%	14%	12%
Not stated	63%	74%	69%
	100%	100%	100%

6. Overnight stays

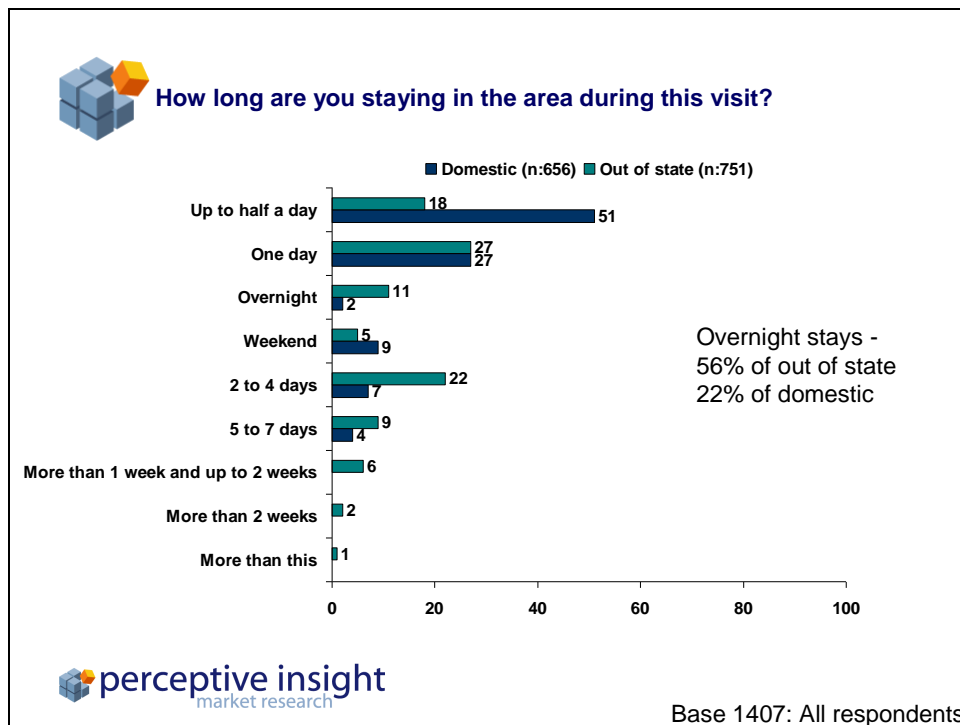
In this section we provide details on the length of visit, the type of accommodation used and perceptions of the accommodation.

Length of stay in the area

The majority of domestic visitors were either in the area for up to half a day (51%), or one day (27%) (Figure 6.1). On average, out-of-state visitors tended to stay in the area for longer, with 56% staying at least one night compared to 22% of domestic visitors.

18% of out-of-state visitors had planned stays of 5 days or more compared to just 4% of domestic visitors.

Figure 6.1: Length of visit to the area



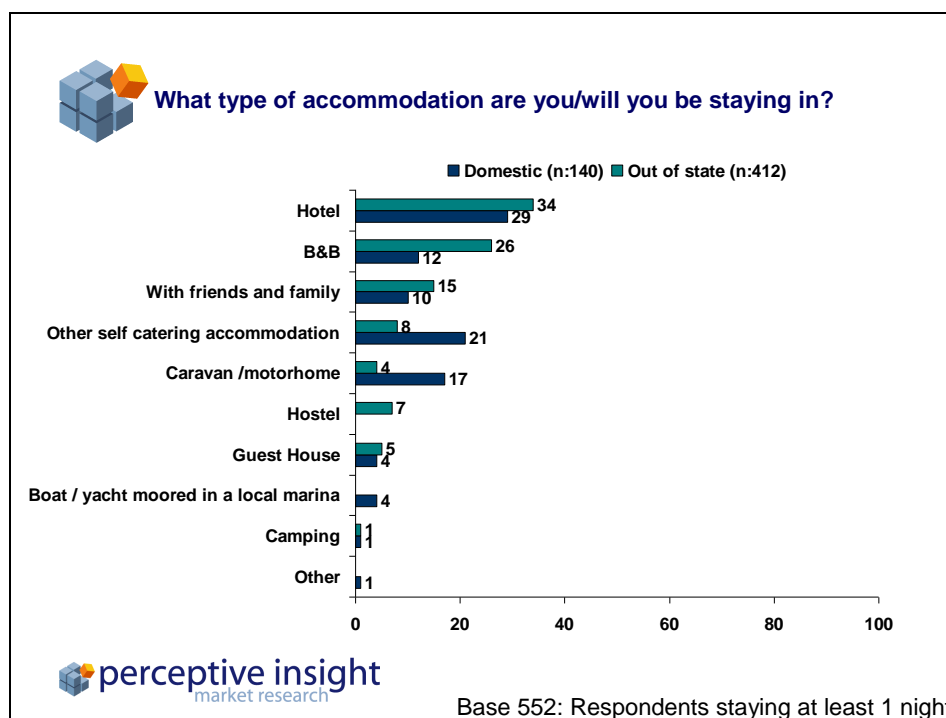
Type of accommodation used

Of the 552 interviewed that were staying overnight, hotel accommodation was the most popular with 34% of out-of-state and 29% of domestic visitors using it (Figure 6.2).

In addition to hotels, B&Bs (26%) and staying with a family or friends (15%) were the next most popular types of accommodation among out-of-state visitors.

Among domestic visitors 21% were staying in self catering accommodation, 17% in a caravan/motorhome and 12% were using B&B's.

Figure 6.2: Type of accommodation used



As Table 6.1 shows, among out-of-state visitors, those in Fermanagh were less likely to use hotel accommodation and more likely to use B&B or self-catering.

Those visiting Derry City were most likely to use hostels. Self-catering and caravans/motorhomes were less popular among those staying in Co Londonderry.

Those visiting Co Tyrone were slightly more likely to use hotels, self-catering accommodation and to be staying with family or friends. They were less likely to stay at B&B's/guesthouses or hostels.

Table 6.1: Type of accommodation used by place of interview for out-of-state visitors

	Fermanagh (n=140)	LDerry (n=204)	Derry City (n=184)	Tyrone (n=68)	Total (n=412)
Hotel	28%	37%	38%	38%	34%
B&B/Guesthouse	33%	32%	32%	23%	31%
With friends and family	16%	12%	11%	21%	15%
Self catering	16%	2%	1%	9%	8%
Caravan/motorhome	6%	2%	1%	6%	4%
Hostel	1%	13%	15%	0%	7%
Boat/yacht	1%	0%	1%	0%	0%
Camping	0%	1%	1%	3%	1%

As Table 6.2 shows, the number of domestic visitors staying overnight by county were lower. Therefore care should be taken when interpreting the results.

In Co Fermanagh (35%) and Co Londonderry (37%) hotels were more likely to be used compared to those visiting Co Tyrone (11%). Self catering accommodation was more likely to be used in Co Tyrone (40%) and Co Fermanagh (19%) compared to Co Londonderry (0%). Caravans/motorhomes were more popular among those visiting Co Tyrone (23% compared to 17% overall).

Table 6.2: Type of accommodation used by place of interview for domestic visitors

	Fermanagh (n=86)	LDerry (n=19)	Tyrone (n=35)	Total (n=140)
Hotel	35%	37%	11%	29%
B&B/Guesthouse	17%	16%	14%	16%
With friends and family	10%	21%	3%	10%
Self catering	19%	0%	40%	21%
Caravan/motorhome	15%	16%	23%	17%
Hostel	0%	0%	0%	0%
Boat/yacht	3%	11%	3%	4%
Camping	0%	0%	3%	1%
Other	0%	0%	3%	1%

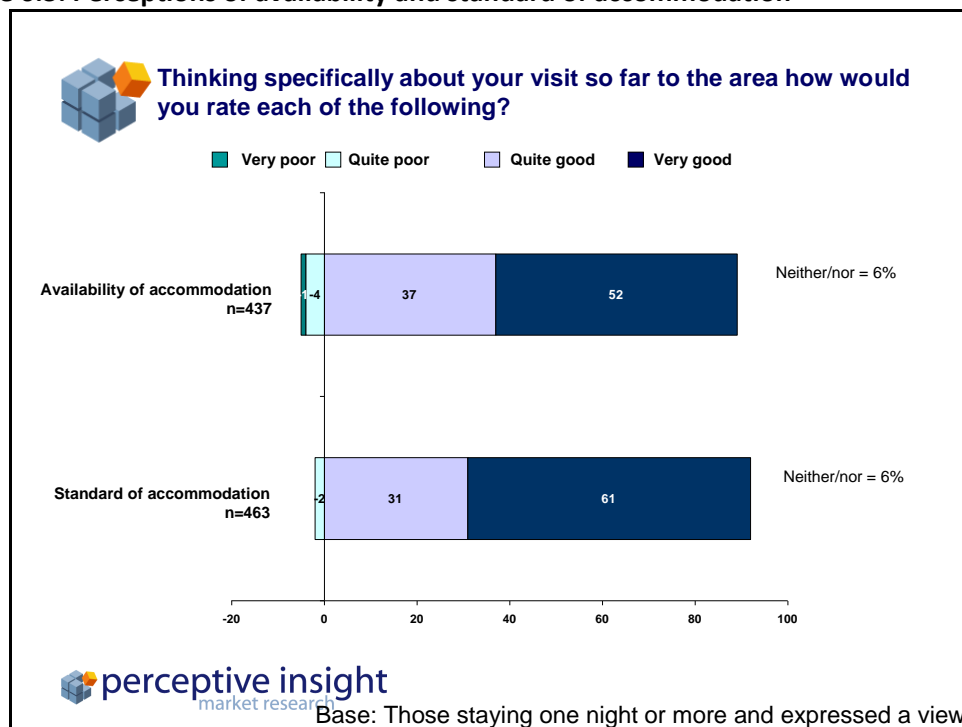
Perception of accommodation

Those staying one night or more were asked their views on the availability and standard of accommodation.

The results overall were positive with 89% rating availability as good and only 5% reporting it as poor (Figure 6.3)

In relation to the standard of accommodation, 92% said it was good and only 2% rated it as poor.

Figure 6.3: Perceptions of availability and standard of accommodation



Views on the availability of accommodation varied by county (Table 6.3). Those staying in Derry City (8%) were slightly more likely to rate it as poor compared to 5% of those overall. Co Fermanagh was more much more likely to be rated as very good in this regard.

Table 6.3: Perception of availability of accommodation by county for visitors staying at least one night and expressing an opinion

	Co Fermanagh n=(174)	Co LDerry n=(180)	Derry City n=(152)	Co Tyrone n=(83)	Total n=(437)
Very good	64%	38%	37%	59%	52%
Quite good	29%	45%	47%	34%	37%
Neither/nor	4%	9%	9%	4%	6%
Quite poor	2%	5%	5%	4%	4%
Very poor	1%	3%	3%	0%	1%
Total	100%	100%	100%	100%	100%

In relation to the standard of accommodation 89% of both domestic and out-of-state visitors rated it as good (Table 6.4). Out-of-state visitors were slightly more likely to rate the accommodation as poor (6%) than domestic visitors (4%).

Table 6.4: Perception of the standard of accommodation by domestic and out-of-state visitors staying at least one night and expressing an opinion

	Domestic n=(118)	Out-of-state n=(319)	Total n=(437)
Very good	55%	51%	52%
Quite good	34%	38%	37%
Neither/nor	7%	6%	6%
Quite poor	3%	4%	4%
Very poor	1%	2%	1%
Total	100%	100%	100%

7.Visitor spend

In this section we look at the proposed spend of visitors to the region. The spend has been worked on an individual basis, with comparisons made between domestic and out-of-state visitors and day trippers and those staying at least one night.

How much do visitors spend?

Visitors were asked how much they had or intended to spend while in the area. The spending of domestic and out-of-state visitors varied as did the spend of day trippers and those staying at least one night (Table 7.1).

Domestic daytrippers were most likely to report that they would be spending nothing during their visits. A further 65% reported that they would spend up to £30. The spend of out-of-state daytrippers was slightly more with only 3% intending to spend nothing and 60% up to £30.

Not surprisingly those staying one night or more reported higher levels of spend with out-of-state visitors slightly more likely to spend more.

Table 7.1: Spend of domestic and out-of-state visitors by length of visit

Spend	Daytrippers		Those staying one night or more		Total (n=1346)
	Domestic	OOS	Domestic	OOS	
Nothing	12%	3%	2%	1%	6%
Up to £30	65%	60%	12%	8%	42%
£31 to £50	16%	20%	7%	10%	14%
£51 to £100	6%	11%	23%	24%	14%
£101 to £500	2%	5%	52%	46%	21%
£501 to £1000	0%	1%	4%	7%	3%
More than £1000	0%	0%	1%	5%	1%
Total	100%	100%	100%	100%	100%

8. Perceptions of the region and venues

In this section we provide details of the views expressed in relation to the standard and availability of facilities, the services and activities on offer as well as overall perceptions of the region and venues.

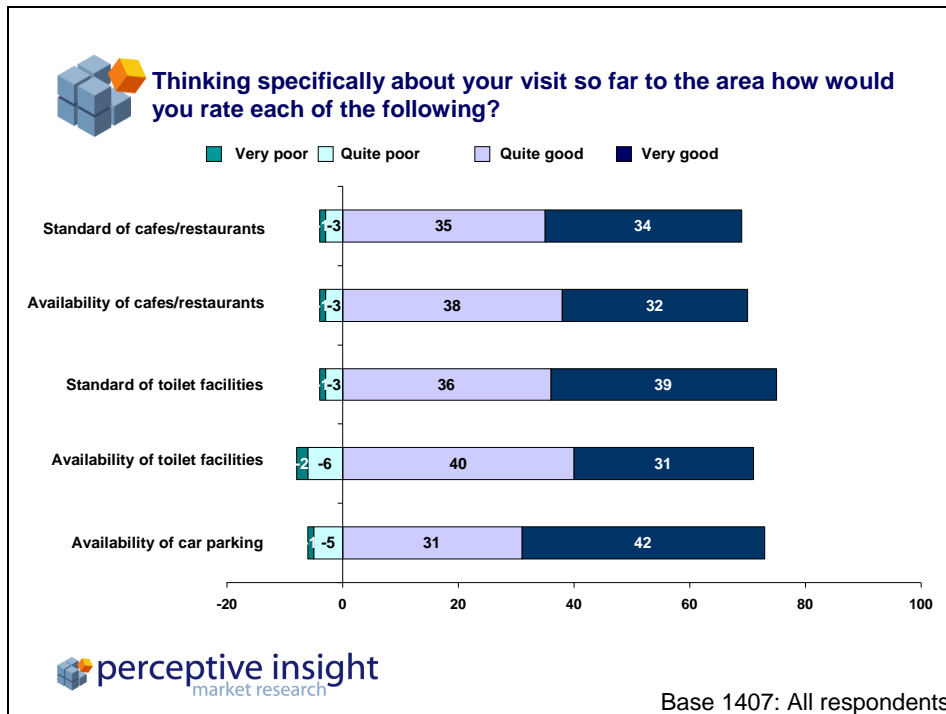
Perceptions of facilities

Views of cafes and restaurants tended to be positive with 69% rating the standard as good and 70% rating the availability as good (Figure 8.1). Only 4% rated the standard or availability as poor.

Respondents were slightly less positive about the availability of toilet facilities with 8% rating them as poor, although only 4% rated the standard as poor.

Just less than three quarters (73%) considered the availability of car parking to be good, while 6% rated it as poor.

Figure 8.1: Perceptions of facilities

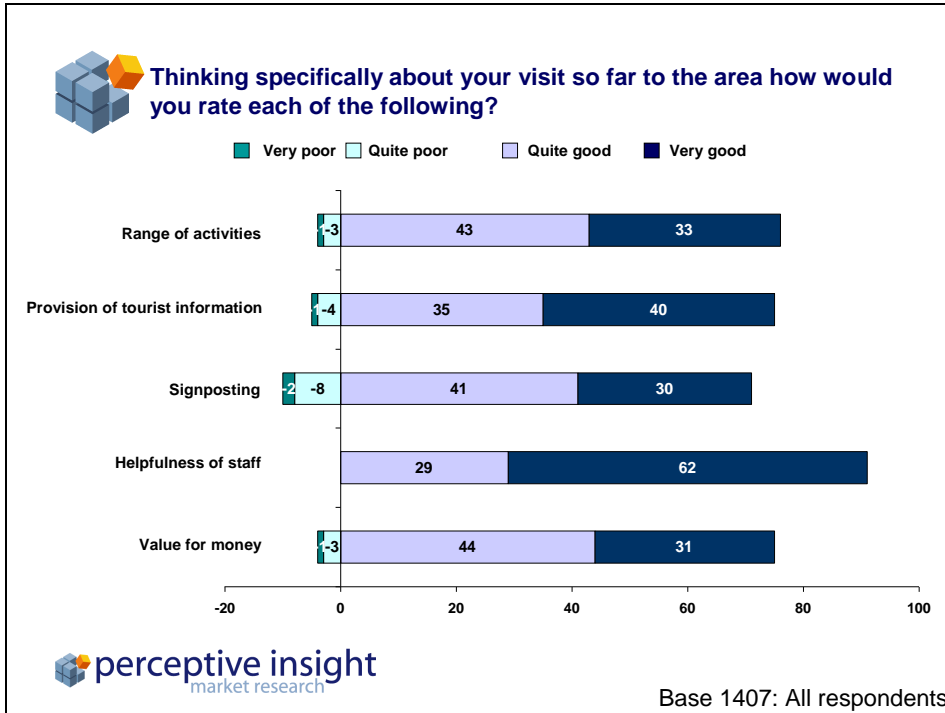


Respondents also tended to be positive about the range of activities and the provision of tourist information (76% and 75% respectively rated them as good) (Figure 8.2). Of particular note is the percentage rating the helpfulness of staff as good (91%, of which 62% considered them to be very good).

Three quarters (75%) rated value for money as good as 4% as poor.

The aspect that was least highly rated was signposting, 71% thought it was good and 10% rated it as poor.

Figure 8.2: Perceptions of facilities

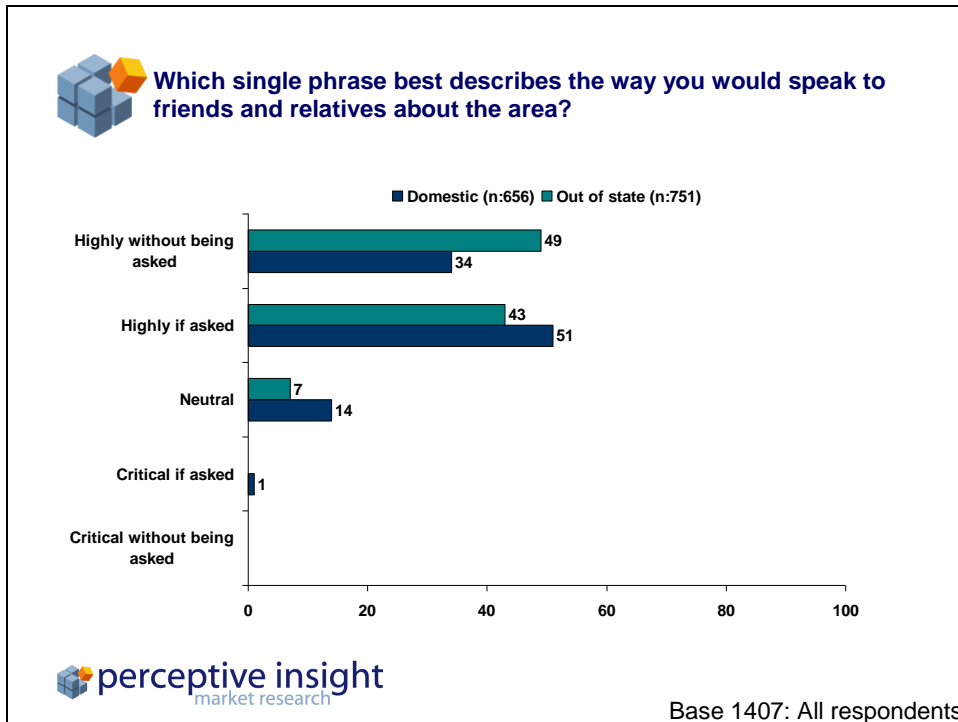


Respondents were asked which of a number of statements best described how they would speak of the area to family and friends (Figure 8.3).

Overall the majority said that they would speak highly of the area with out-of-state visitors more positive and proactive in this regard; 49% said they would speak highly without being asked compared to 34% of domestic visitors.

Only 1% of domestic visitors said they would be critical of the area.

Figure 8.3: Perceptions of the area



When probed further respondents said the aspects of the area which contributed to their positive views were the scenery (27%), the people (23%) and the activities (7%) (Table 8.1).

Respondents had few reasons contributing to a negative perception of the area.

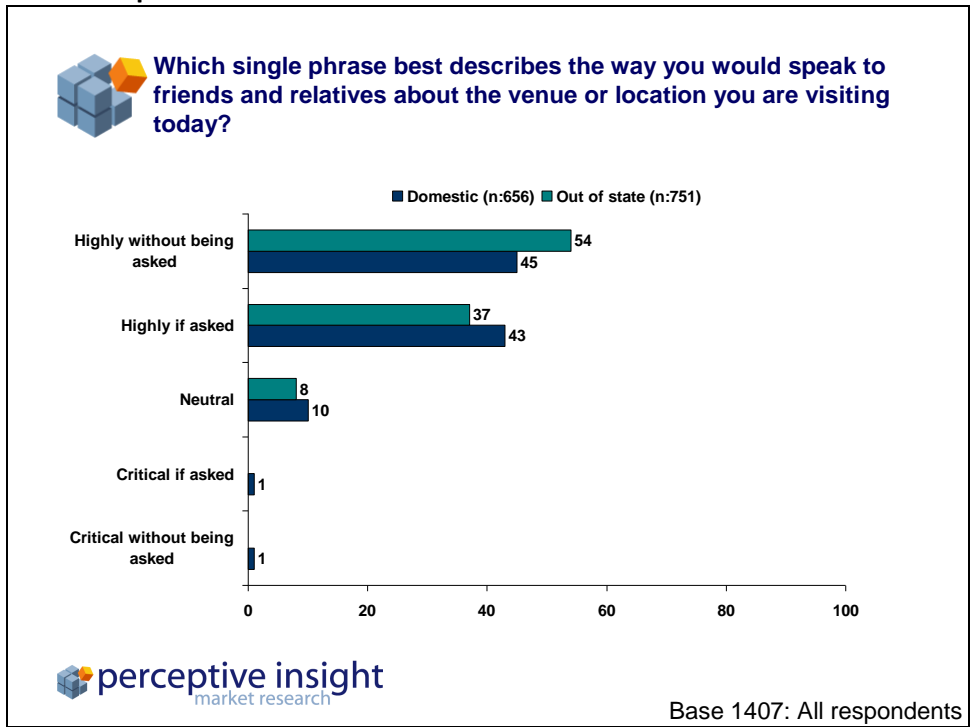
Table 8.1: Reasons given for perceptions of the area

	Domestic n=(656)	Out-of-state n=(751)	Total
Positive			
Beautiful areas/scenery/unspoilt	22%	30%	27%
People are friendly/nice – feel welcomed	16%	29%	23%
Lots to do/see (plenty of activities)	7%	8%	7%
History/culture	3%	10%	6%
Relaxing/quiet/peaceful	7%	3%	5%
Clean and tidy (well kept)	4%	4%	4%
From this area	7%	1%	4%
Have seen an improvement	2%	2%	2%
Good for children (educational)	3%	1%	2%
Worth a visit/good day out/enjoyed it	3%	2%	2%
Love it here/lovely city	2%	1%	1%
Negative			
Improvement needed	1%	0%	1%
Not a lot to do	1%	0%	1%
Bad weather	0%	1%	1%

Which best describes how you would speak of the venue

Respondents were also asked how they would speak of the venue they were attending. Again the results were positive with 91% of out-of-state visitors and 88% of domestic visitors saying that they would speak highly of them (Figure 8.4). 2% of domestic visitors said they would be critical of the venue they were attending.

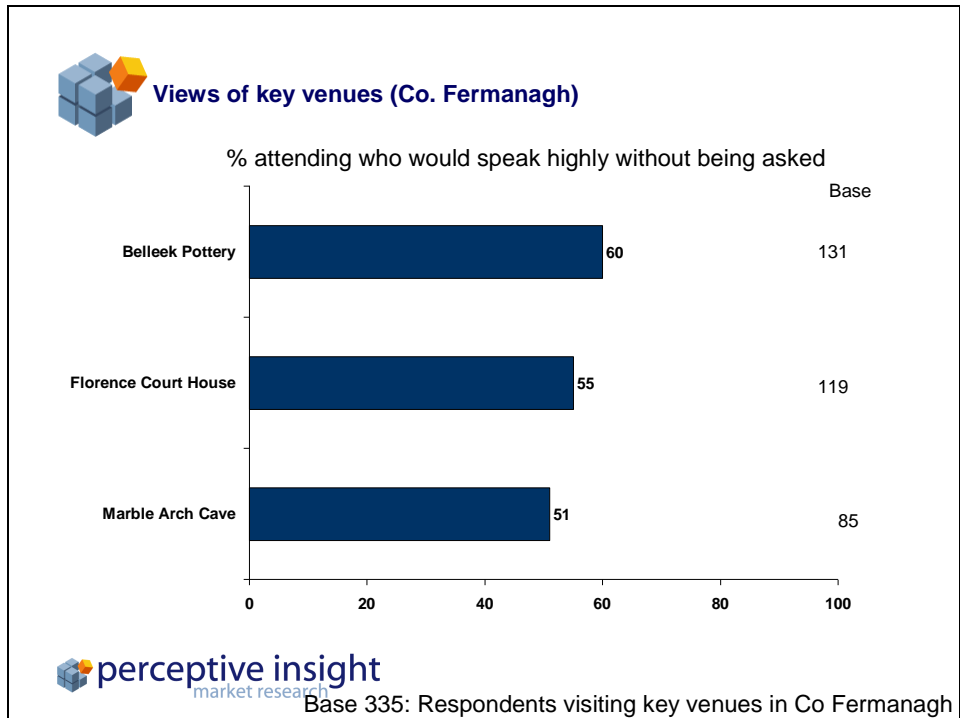
Figure 8.4: Perceptions of venues



We analysed the results of this question for those venues where 45 or more interviews were conducted. Presented in the following charts are the results based on those who said they would speak highly without being asked – the ‘active advocates’.

Of the venues located in Co Fermanagh, over half of visitors said they would speak highly without being asked (Figure 8.5).

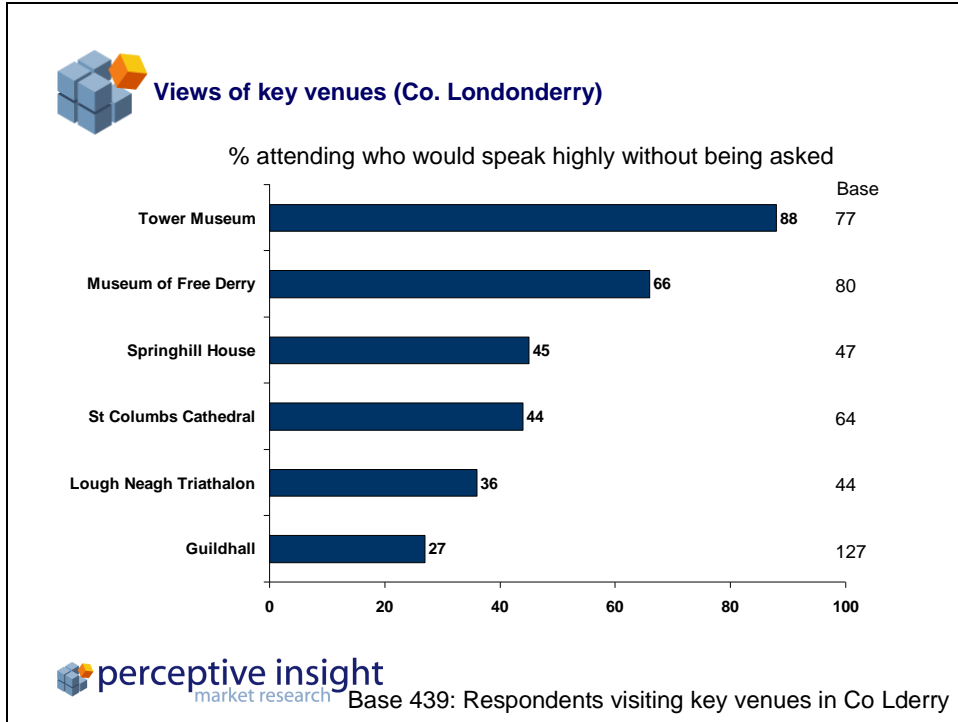
Figure 8.5: Visitors who would speak highly of key venues in Co Fermanagh without being asked



The venue which attracted the highest proportion of visitors overall who said they would speak highly without being asked was Tower Museum in Derry, with 88% reporting this (Figure 8.6). This is an excellent result.

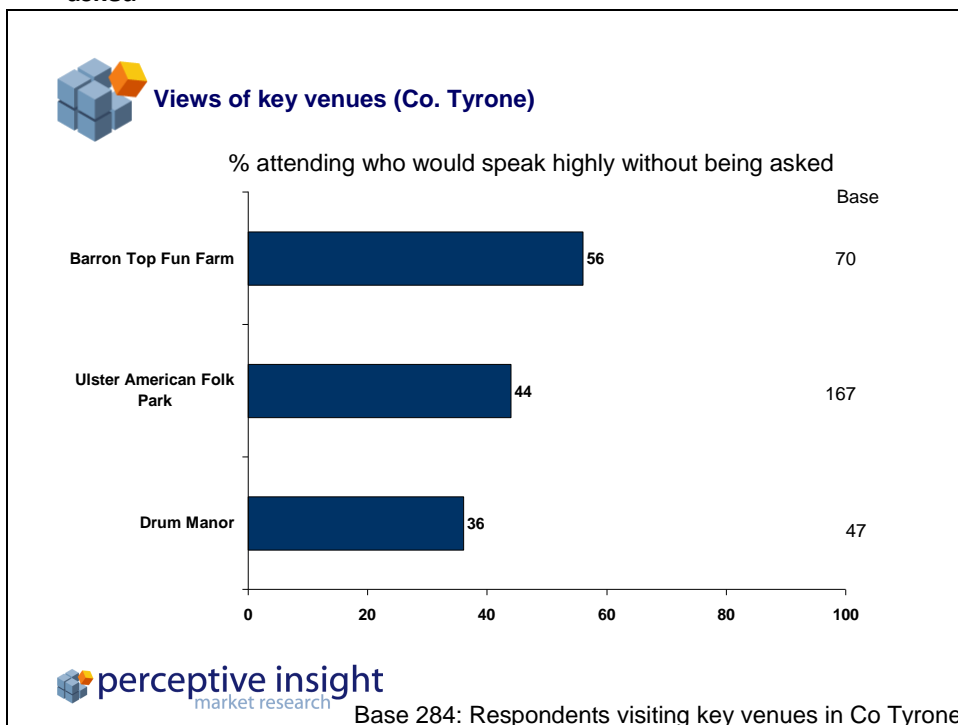
Two thirds of those attending the Museum of Free Derry (66%) said they would speak highly without being asked, while 45% said the same of Springhill House and 44% of St Columb’s Cathedral. Lough Neagh Triathlon and the Guildhall attracted fewer ‘active advocates’, however this could be due partly to the type of venues that they are.

Figure 8.6: Visitors who would speak highly of key venues in Co LDerry without being asked



In Co Tyrone, 56% of those attending Barron Top Fun Farm were ‘active advocates’ (Figure 8.7). In comparison to other main tourist attractions Ulster American Folk Park attracted less proactive positive comments (44%).

Figure 8.7: Visitors who would speak highly of key venues in Co Tyrone without being asked



9. Conclusions

In this section we bring together the main findings from the research.

Who visits the Western Region

The profile of visitors to the region indicates that it has broad appeal across ages and gender.

Among domestic visitors it has particular appeal to women, those aged 35 to 55, and those classed as socio-economic groups ABC1. It is worth noting that 43% of domestic visitors travelled with children and young people aged under 18. Also over half (54%) had travelled more than 30 miles to visit the venue.

While just over one third of domestic visitors travelled in pairs this rose to 46% for out-of-state visitors. However most visitors were travelling as part of a larger group. Out-of-state visitors were less likely to travel with children and young people aged under 18 (23%) although this still made up almost one quarter of all parties.

About the visit

Domestic visits are dominated by daytrippers (78%), while 56% of out-of-state visitors chose to stay overnight.

The majority of visits are conducted by car which allows a degree of flexibility over the destinations visited. Not surprisingly a higher proportion of out-of-state visitors than domestic visitors travel by coach, bus, train or on-foot (28% vs 10%).

As part of the visit there appeared to be a limited amount of travel within the region among domestic visitors. However, almost one third of those out-of-state visitors interviewed in Co Tyrone were planning trips to the other counties, and 18% of those interviewed in Co Fermanagh were visiting Derry and 10% of those in Co Fermanagh visiting Derry. Although many within the workshops expressed the view that there was limited travel within the three counties of the region and that the infrastructure did not support this, some out-of-state visitors appear to be widening the scope of their trip.

The most effective marketing tool for the region appears to be 'word of mouth'. This emphasises the need for maintaining visitor satisfaction and to create visit itineraries that give visitors something to talk about. Out-of-state visitors also rely on brochures, tourist information centres and tour guides to inform their trip. Surprisingly few mentioned the internet as a source of information. However it must be questioned whether this is due to a lack of using the internet or not being able to find the information they need on it.

Walking was the most popular activity undertaken during the visit. However at the workshops the point was made that it would be beneficial to distinguish between serious walkers and those who undertake it as part of their overall visit to a site. Museums, historic properties and country, forest and garden parks were also popular among visitors. One in 10 had planned sport as part of their visit.

Overnight stays

Of those staying in the region most visited for two to four nights. The stays of out-of-state visitors tended to be longer than domestic visitors. Only 4% of domestic visitor planned to stay for 5 days or more compared to 18% of out-of-state visitors.

Among out-of-state visitors both hotels (34%) and B&Bs (26%) were popular and 15% stayed with family and friends.

Although 29% of domestic visitors used hotels, 21% stayed in self-catering accommodation and 17% in caravans/motorhomes.

Overall the perceptions of the standard and availability of accommodation was good. This was particularly the case for those visiting Co Fermanagh and Co Tyrone.

Visitor spend

Not surprisingly those staying at least one night were more likely to have a higher level of spending than day trippers. Data presented previously shows that out-of-state visitors are more likely to stay overnight and therefore will have higher levels of spend compared with domestic visitors. Indeed when the figures are analysed further, the spend of out-of state daytrippers is more than domestic daytrippers.

Perceptions of the region and venues

Perceptions of the facilities within the region are very positive with respondents being particularly complimentary about the helpfulness of staff – 62% rated them as very good. Also 49% of out-of-state visitors and 34% of domestic visitors would speak highly of the region without being asked (43% and 51% respectively would speak highly *if asked*).

The aspects of the area which contributed to the positive views were the scenery, the people and the activities.

In relation to areas for improvement this focused on sign-posting, toilet facilities and availability of car parking. Indeed a point that was made very strongly at the workshop in Derry was the requirement for toilets that could accommodate the needs of visitors travelling by coach and in particular those arriving on a Sunday morning.

Respondents were also very positive about the venues they visited with 54% of out-of-state visitors and 45% of domestic visitors saying that they would speak highly of them without being asked. Of particular note is the Tower Museum, where 88% of those interviewed there said that they would speak highly of it without prompting.

10. Appendix A – List of attendees

The following tables list the attendees present at each workshop and the organisation they were representing.

Co. Fermanagh workshop – Enniskillen town hall

<i>Name</i>	<i>Organisation</i>
Tanya Cathcart	Fermanagh Lakeland Tourism
Terry McCartney	Belmore Court Motel
Patricia McCauley	Belleek Pottery
Eddie McGovern	Fermanagh District Council
Valentina Nixon	Erne Tours
Oliver Wilkinson	Share Centre
Charlotte Wilson	Fermanagh Tourist Information Centre
Unnamed Attendee	N/A

Co. L'Derry workshop – Derry City council offices

<i>Name</i>	<i>Organisation</i>
Odhran Dunne	Derry Visitor & Convention Bureau
Pamela Green	National Museums NI
Amanda Hamilton	Millennium Forum
Angela Hughes	ILEX Urban Regeneration Company
Kathleen Hughes	City Centre Initiative
Dessie Lynch	Executive Travel Coach Hire
Gerry McCloskey	Monico Lounge
Sharon McCrossan	City Tours
Catherine O'Connor	Derry Visitor & Convention Bureau
Terrance O'Kane	Tower Museum
J.P. Roberts	NW Regional College
Eileen Walsh	The Donegal Shop

Co. Tyrone workshop - Cookstown council offices

Name	Organisation
Maeve Curran	Dungannon & South Tyrone Council
Paula Doherty	Barrontop Fun Farm
Jayne Greer	Friends of Lissan Trust
Mary Majer	Flavour of Tyrone
Mary McKeown	CDC
Jennifer McLernon	Tourist Guide

Appendix B – Workshop findings

The workshops which took place provided an open forum for stakeholders and providers in each area of the WRTP to present their views. Workshops consisted of a presentation showing draft findings and a final discussion, however attendees were encouraged to add comments and ask questions throughout should they feel the need.

Below are summaries of comments and suggestions made by the attendees at each workshop.

Co. Fermanagh workshop

General comments on findings

- With regards to origin of visitor, it was felt that the ROI visitor intake (14%) was lower than expected. It was suggested this may be due to residents coming up to shop but not to stay in the area.
- It was commented that there was perhaps a higher percentage of ABC1 visitor now compared to previous research carried out in 1999-2004.
- Compared to previous research, there appeared to be more people learning about the region and venues through brochures and the internet.
- Some attendees commented that people doing water activities such as sailing and boating weren't coming off the water to spend money or get involved in activities on 'dry' land.
- Consistent with our findings, it was felt that in Fermanagh (more specifically, Enniskillen), there was a lack of indoor activities such as bowling or play areas, where children can play by themselves whilst parents have refreshments.
- It was felt that Co. Fermanagh is the most popular of the three Western counties for domestic visitors. It was suggested this was perhaps due to the marketing budget being higher for domestic marketing as well as the relative ease of attracting domestic visitors compared to out-of-state visitors.
- Most attendees agreed with the finding that 11% of visitors suggested better signposting as an improvement. It was also commented that it is important to get a balance between erecting more signs, and having too many signs which could then lead to confusion. It was thought that ordinary road signs were lacking, even before brown coloured tourist signposts are taken into consideration.
- There was surprise at the result that only 51% of visitors to Marble Arch Cave would speak highly without being asked. There was interest expressed as to how other attractions such as Belleek Pottery rated higher.
- It was felt that there is a need to market differently to target various types of visitors as different sorts of people go to different locations.
- Attendees to the workshop felt that out-of-state visitors are attracted by the Western region as a whole, but when it comes to domestic visitors, there is a need to separate as counties and that is when things become competitive.

Suggestions for the final report

- In terms of 'top attractions to visit', some expressed a wish to have the attractions further broken down by county and to note that the findings may have been skewed by where interviewers were located.

- Attendees felt that the Erneside Shopping Centre may have been a good place to visit to carry out some of the interviews as this would provide a better mix of visitors. However, it was pointed out that this approach would be problematic logistically due to the difficulty in identifying which shoppers were visitors, which were tourists, and which were residents.
- In terms of walking in the list of activities, it was suggested that for marketing purposes, it was important to explicitly define walking. Were people walking as part of their leisure activity or were they serious walkers?
- For the findings on 'type of accommodation', some felt that the information may be more useful if broken down into counties. It was also thought that 'Guest House' and 'B&B' should be combined as most visitors probably did not know the difference between the two and therefore the difference between them may not be valid.
- It was felt that the report was important in highlighting how different the three counties are and how a joint approach may not be suited. It was noted that some felt it would have been more useful to have the findings broken down more into counties.

Co. L'Derry workshop

General comments on findings

- There was surprise by one attendee that the average size of party was not higher as it was felt that there were a lot more coach trips to the region than is perhaps expressed by the figures.
- There was also surprise that the Bogside art gallery was not in the list of venues where interviews occurred as this was thought to be a popular venue.
- The suggestions of more/better toilet facilities by 4% of visitors seemed to correspond with attendees views that there are not enough toilets in Londonderry to cater for the amount of visitors. This was viewed as a particular problem when dealing with the arrival of coach loads of tourists.
- In terms of visitor spending, it is thought there is a challenge in how to get people to spend at the minute in the current economic crisis.
- A number of strengths and weaknesses were identified from the discussion. The strengths discussed for the area included:
 - Beautiful scenery. This is in keeping with the results which found 27% of visitors listed this as a positive for the area. Specifically, Derry has scenery such as the Foyle Bridge and Derry Walls.
 - The area also has a great history both in terms of industry and 'the troubles'.
 - The people working in the area, particularly in hospitality facilities are welcoming and very helpful.
 - Londonderry has great events which happen throughout the year, specifically the famous Halloween celebrations and jazz festivals.
 - The arts are well represented in Derry. There are a number of galleries and buildings such as the millennium forum to cater for this niche.

There were also a number of weaknesses and criticisms put forward for the area.

These included:

- The lack of toilet facilities was again strongly emphasised;
- Sunday opening of shops and amenities was also identified as a weakness. In comparison to most other parts of Europe, there is little to do in Derry on a Sunday, particularly in the morning;
- Signage was an issue thought to need to be addressed as a priority;
- Marketing was also identified as an issue. Some thought there is little in the way of co-ordinated marketing for Londonderry;
- There was thought to be a lack of co-ordination and communication between parties. The view was expressed that no one knows what the other party is doing which in turn causes confusion. It was also thought this lack of co-ordination meant that problems from years past, such as the lack of toilets, have still gone unresolved;
- There is nothing in Londonderry to reflect emigration from the area during the famine and troubles. Acknowledgment of past events may have appeal to visitors from North America. This could link in to genealogy and a method of allowing visitors to trace their family tree.

Suggestions for the final report

- One attendee expressed a wish for those visitors coming in coach trips to be examined more in the results as they perceive them as being a big segment of those visiting Derry.
- As with the other workshops, there was a need expressed for results to be further broken down into counties rather than the Western Region as a whole.

Co. Tyrone workshop

General comments on findings

- In terms of 'origin of visitor', it was commented that the 3% from Scotland was lower than expected.
- There was concern over why some popular attractions weren't visited in Co. Tyrone for research such as the Linen Green and Tyrone Crystal.
- The amount of people walking as an activity was thought to be quite high due to heavy promotions of the Sperrin mountains, and because people have to walk due to buses/coaches not being able to reach the area. The Sperrins walking festival was also on at the time of interviewing.
- It was felt that suggestion for play areas and things for children was due to the high number of visitors aged 5-8.
- There was a lot of discussion regarding the type of accommodation statistics. The number of visitors staying with friends and family was thought to be quite low. It was felt that perhaps this was due to there not being enough room to stay with them. The number of visitors using caravans or motorhomes was thought to exceed expectations and there was a worry that demand may outweigh supply in this sector as there is little in the way of facilities to cater for this market in Co. Tyrone.

- The statistics concerning where people were staying in the province was thought to be interesting. It was pointed out that Derry attracted a much higher number of out-of-state visitors compared to domestic visitors, but this was in fact the opposite for Enniskillen. A few reasons suggested for this difference included; a lack of transport options or routes from Derry to Enniskillen meaning that access was limited, a lack of marketing/promotion in Derry to bring visitors down to Enniskillen and the effect of the quantity and quality of places to stay in the two areas.
- Suggestions to improve the amount of visitor spend were to link together venues or areas and provide offers such as 2 for 1 entry, or to use a passport scheme, meaning tourists would get discount or special rates when they show their passport.
- In examining the views of key venues in Tyrone, it was thought the low numbers for the Ulster American Folk Park may have been due to weather conditions (as the park is primarily located outside). Another possible reason for the low visitor numbers compared to attractions such as the Tower Museum in Derry may have been due to the lack of a guided tour and active demonstration of the venue.
- The final discussion brought up a number of strengths and weaknesses. The strengths discussed for the area included:
 - An unspoilt, and to an extent undiscovered region;
 - The western province has something for everyone, from city breaks in Derry to the lakes in Fermanagh; and
 - Key visitor attractions such as Tyrone Crystal and Linen Green.

There were also a number of weaknesses and criticisms put forward for the area. These included:

- Lack of coordination and agreement between the councils involved in the three counties;
- ROI marketing spend should be increased to tap into this market which is 'on the doorstep';
- One tourist brochure combining the three regions and their attractions would be more beneficial and less confusing than a number of separate leaflets; and
- Lack of funds for marketing and promoting the area due to budgets being cut.

Suggestions for the final report

- A number of attendees asked for other figures to be included in the report which weren't carried out by PIMR. These included visitor numbers from Lissan House and Country Fest.
- There was a need expressed to differentiate more clearly between the terms 'sightseeing' and 'day trip' when it came to the main purpose of the visit.
- With regards to main cities and towns to visit, some attendees were curious to know some other regions which were visited from the three counties.
- In terms of accommodation, echoing the Co. Fermanagh workshop, there were comments made that it may be better to group Guest House and B&B together. There was also a wish expressed to have benchmark figures for the Republic of Ireland and other areas in Northern Ireland for comparison purposes.

- It was suggested that the statistics for how much visitors spend should be linked to their length of stay to see if those visitors staying longer are actually spending more. It was also proposed that if possible, the amount that visitors spend to be broken down per day.
- In terms of perception of accommodation, some attendees proposed that the standard and availability of accommodation be further broken down to present a clearer vision of where accommodation could be improved.

Appendix C – Venues at which interviewing was conducted

Venues Attended		
Drum Manor Forest Park	Prehen House	Fermanagh Show
Springhill House	Riverwatch Museum	Tourist Information Centre Derry
Wellbrook Beetling Mill	Open Top Tours	Walls festival
Ardboe Cross	Enniskillen Tourist Info Centre	Wakejam festival
Burnavon Arts and Culture Ctre.	Belleek Pottery	Killymaddy Tourist centre
Killymoon Golf Club	Marble Arch caves	Tyrone crystal visitors centre
Ulster American Folk Park	Florencecourt House	The Linen Green
An Creagan Visitor Centre	Enniskillen Castle	
Beaghmore Stone Circles	Barron Top Fun Farm, Donemana	
Bellaghy Bawn	Derry Tourist Information Centre	
Tower Museum	Moneymore Festival	
St Columb's Cathedral	Lough Neagh Triathlon, Ballyronan	
Museum of Free Derry	Lough Food & Drink Festival, Ballyronan	
Guildhall, Derry	Alley Centre Strabane	
City Walls	Killeter fair	