



northernireland
tourist board

Perceptions of Derry~ Londonderry

UK City of Culture

2013

Feedback on the perceptions of Derry~Londonderry UK City of Culture 2013 – NITB Industry and Consumer Barometer Survey Results

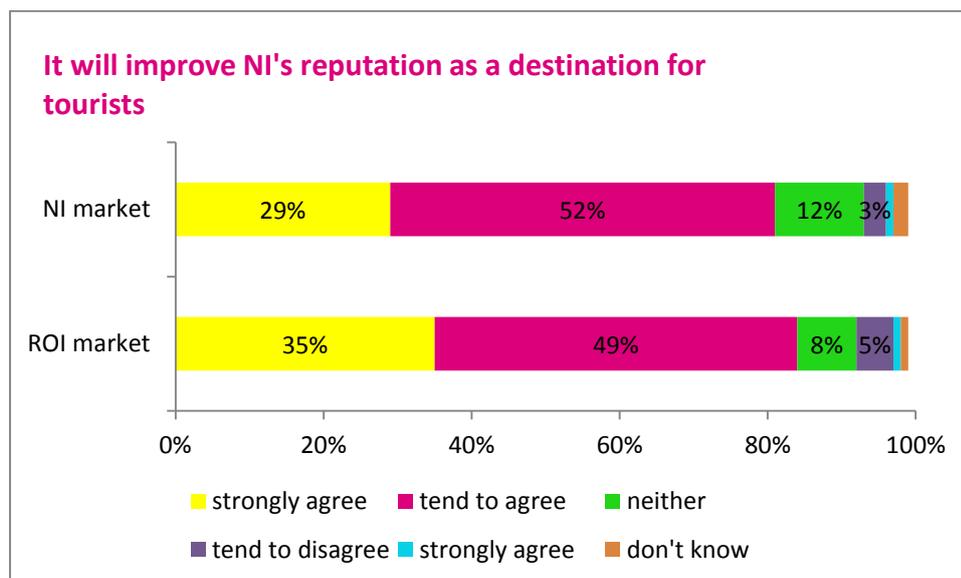
NITB included a number of questions regarding the perceived impact of Derry~Londonderry UK City of Culture in two recent surveys:

- NITB’s Leisure Consumer Barometer survey 2013 Wave 2 comprising a sample of 1,000 interviews in both NI and ROI, representative of the adult population in each respective market. Fieldwork was conducted between 15th and 29th August 2013.
- NITB’s Tourism Industry Barometer 2013 Wave 2 comprising 600 on-line interviews with tourism businesses in NI during September

Consumer Feedback

Awareness of the UK of City of Culture was very high in August among NI residents (88%), In ROI, two fifths of residents (40%) were aware of the event taking place in NI, with awareness higher in border counties and Dublin. The following views are based on those who were aware that the event is taking place in NI.

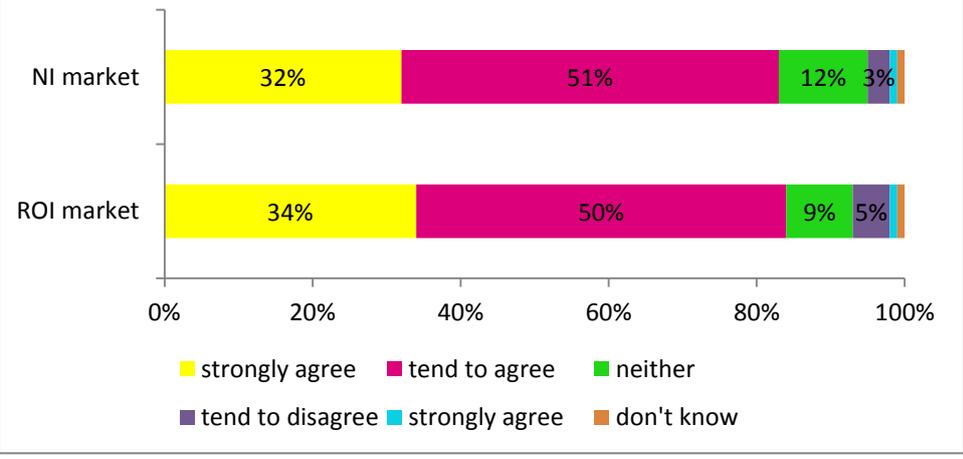
The NI and ROI markets agree that the Derry~Londonderry UK City of Culture 2013 will help **put NI on the tourist map** by enhancing the perceptions of the tourism potential of Northern Ireland.



Source: NITB NI and ROI Consumer Barometer

- Over 80% in both markets felt that it would improve NI’s reputation as a destination for tourists with a similar majority recognising that it would also improve our reputation as a place that can hold major events.

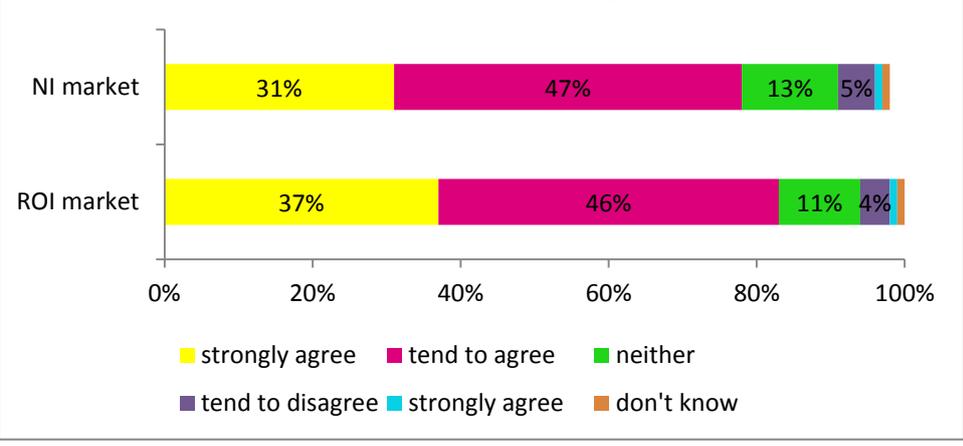
It will improve the reputation of NI as a place that can host major events

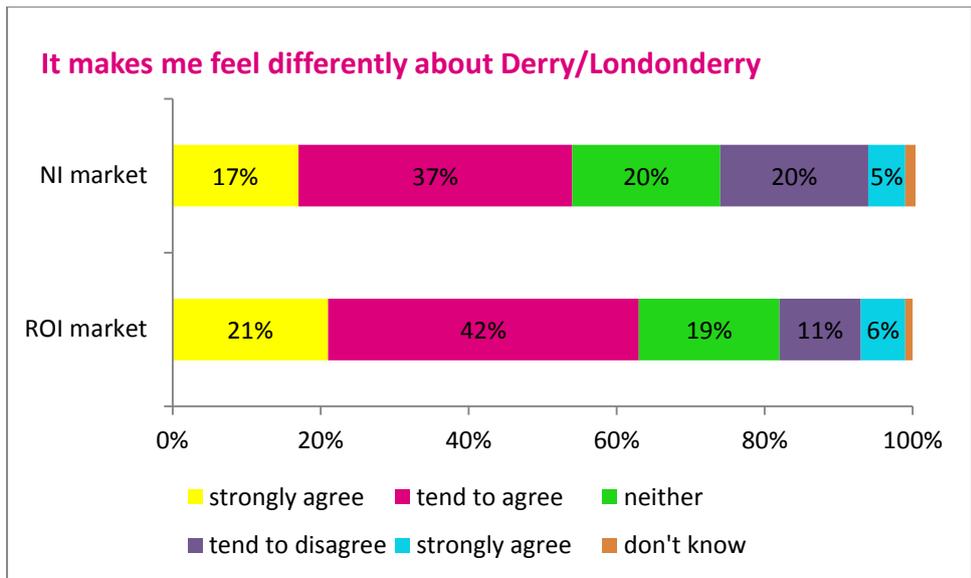


Source: NITB NI and ROI Consumer Barometer

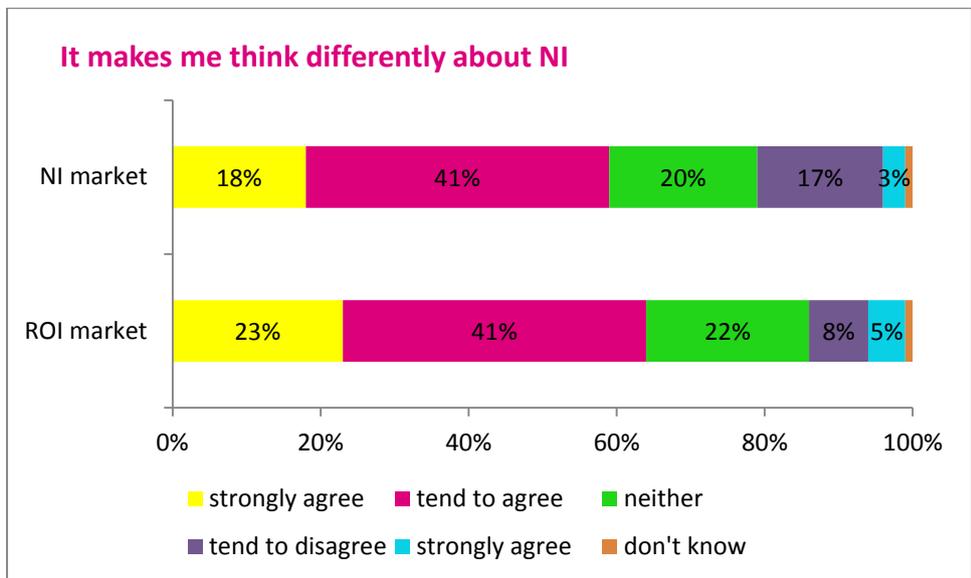
Furthermore, they also believe that the City of Culture impact goes beyond tourism, helping to **create a legacy** of an improved image and changed perceptions not just of Derry/Londonderry but the country itself conveying the message that Northern Ireland is confidently moving on.

Choosing Derry/Londonderry as the UK City of Culture in 2013 demonstrates that people from outside NI feel that NI is confidently moving on





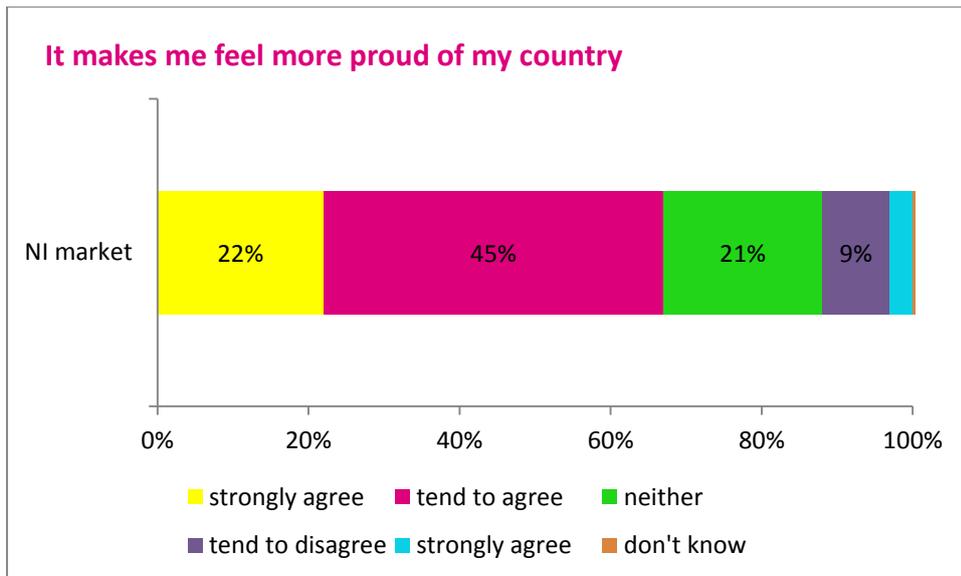
Source: NITB Consumer Barometer



- The prevalent view in both the domestic and ROI markets was that the selection of Derry/Londonderry as UK City of Culture demonstrates that people outside NI think that NI is confidently moving on (around 80% in agreement).
- Not only did the majority agree that it made them think differently about Northern Ireland, but the positive impact that UK City of Culture has also had on perceptions of Derry~Londonderry is evident within both markets.
- Almost two thirds of ROI agreed that it made them think differently about Derry~Londonderry, and over half of respondents in NI also agreeing .

Civic Pride

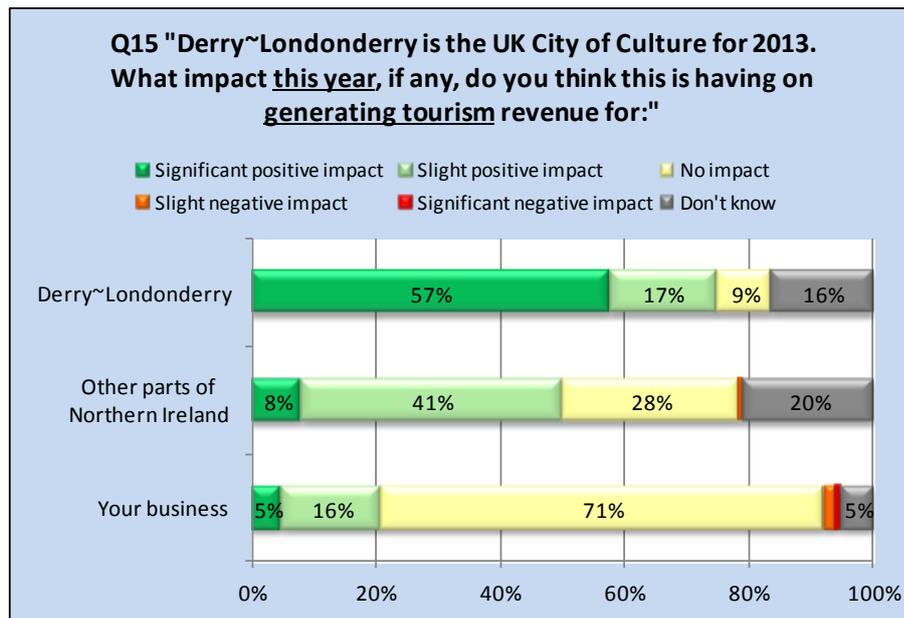
Furthermore, despite the UK City of Culture only taking place in Derry~Londonderry, it has engendered a sense of civic pride among residents across Northern Ireland. Two thirds of those who were aware of the event reported that it made them feel more proud of Northern Ireland.



Source: NITB Consumer Barometer

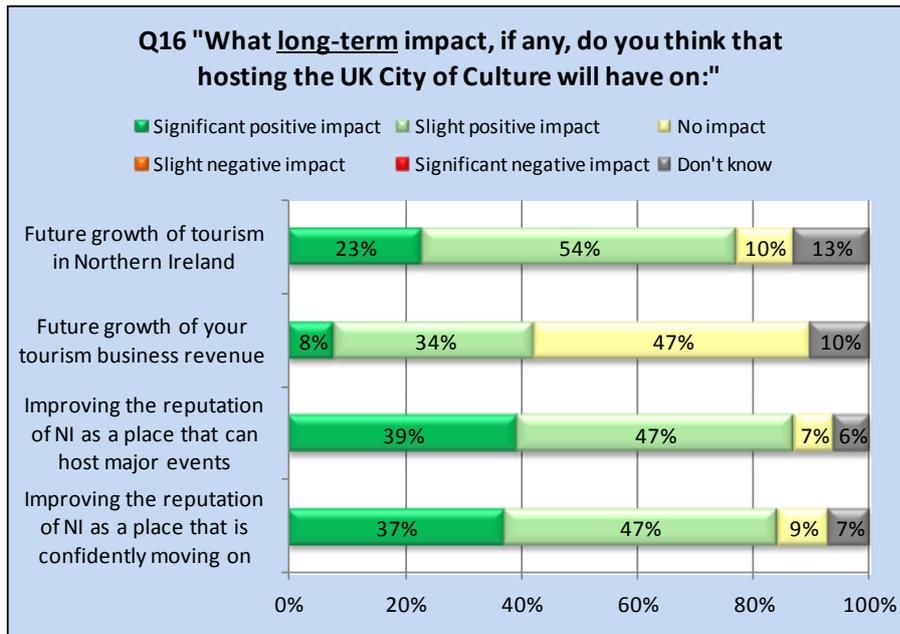
NI Industry View

The tourism industry shares the view that, so far, the 2013 UK City of Culture has delivered a **significant positive impact**, with recognition that the benefit is not just felt by Derry~Londonderry.



- 87% of tourism businesses from the North West felt a positive impact on tourism revenue
- Significantly, 49% felt that other parts of NI had also benefited, expressed by nearly half of respondents from Belfast (47%), North East(46%) and South East (49%). Those in the South West were most likely to perceived that benefits would spread beyond Derry~Londonderry
- Overall one fifth reported a direct financial benefit to their own business so far

Most importantly, the industry also **endorsed the legacy effect** of the UK City of Culture for future tourism growth. They appreciate the role it will play in raising the reputation of Northern Ireland.



- Widespread recognition that it's legacy not only significantly impacts on Northern Ireland's reputation as a place that can host r Source: NITB Tourism Industry Barometer place that is confidently moving on.
- Affirmation of the potential impact on the future growth of tourism in Northern Ireland as recognised by over three quarters of industry translates into an albeit smaller, but significant proportion, who anticipate a long term positive impact for their own tourism business.

NITB is in the process of completing full evaluations of the 5 City of Culture Events funded by NITB

- Return of Colmcille
- Fleadh Cheoil
- Walled City Tattoo
- Lumiere
- Turner Prize

These will measure impacts such as perceptions, civic pride and return on investment. Reports will be available in due course.