

BELFAST 2005

Tourism

Facts & Figures



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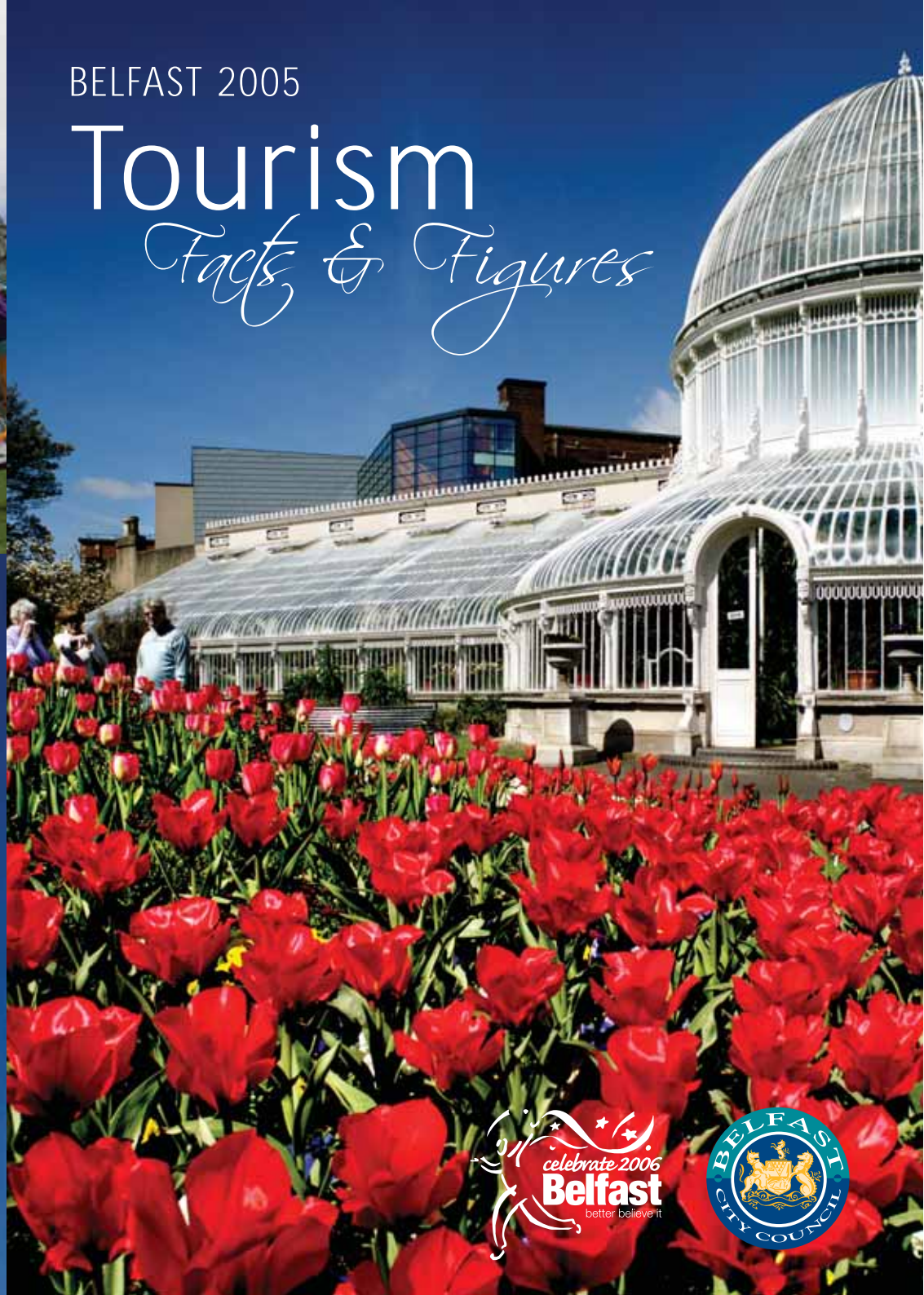
www.gotobelfast.com



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In the year that the magnificent Belfast City Hall celebrates its centenary year, it is abundantly clear that Belfast is once more perceived around the world as a vibrant and confident City



2005 was another record year for Belfast tourism and we can look to the future with great confidence in our continued success

Diane Dodds



Greetings and Salutations

In the year that the magnificent Belfast City Hall celebrates its centenary year, it is abundantly clear that Belfast is once more perceived around the world as a vibrant and confident City.

What better proof of that than the **incredible 6.4 million people visiting our City in 2005**. Today, these visitors enjoy a **wealth of top visitor attractions, wonderful festivals, world-class accommodation and restaurants**, with our **magnificent venues** regularly graced by the giants of the entertainment world.

The remarkable growth of Belfast to become one of Europe's most popular destinations has not been by chance. Along with the many millions of pounds invested in our tourism infrastructure, there has been a careful analysis of market trends and visitor expectations within the sector and a dedication to continually improving our tourism product offering.

The independent research commissioned by Belfast City Council for each of the last eight years has played an important role in revealing these trends and indicating where our strengths and weaknesses lie, thus helping our Tourism Development Unit plan their strategy for the future.

In introducing this summary for the last tourism year, it gives me great pleasure to reveal that the findings for 2005 are, again, hugely encouraging. Those 6.4 million visitors, both indigenous and out of state, represent an increase of 8.5% on the previous year; while **the importance of tourism to Belfast's economy is reinforced by the fact that the total of £285.2 million spent by these visitors helped sustain nearly 16,000 full-time jobs**.

2005 was another record year for Belfast tourism and we can look to the future with great confidence in our continued success.

Councillor Diane Dodds, Chairman
Development (Tourism & Promotion of Belfast) Sub Committee 2005



The 'Belfast Tourism Success Story' continues to develop, flourish, thrive and triumph



Belfast's popularity as a top European destination is measured by footfall and spend, as revealed in the 2005 research findings



The total number of visitor nights spent in commercial accommodation increased by 25% from 2004

Belfast's Continued Success

The *'Belfast Tourism Success Story'* continues to develop, flourish, thrive and triumph.

Drawn by its vibrancy, warmth and charm, increasing numbers of visitors from around the world are making Belfast one of the most popular City destinations in Europe. In 2005 tourists flocked to Belfast from as far away as North and South America, Australia, China, Africa, Poland, Canada, France, Germany and Italy, as well as closer to home with the UK and Republic of Ireland.

Those visitors discovered **a City with a unique heritage** and a genuinely **warm welcome**, which has been transformed by astonishing levels of investment over the last few years. They enjoyed **magnificent visitor attractions, award-winning restaurants**, a range of **superb hotels**, from budget to luxurious boutique, and an ever-growing number of **fascinating tours**; by bus, taxi, foot and boat. To that you can add **atmospheric bars, cutting-edge dance clubs, a burgeoning shopping scene, world-class music** and **entertainment** and **fabulous festivals** throughout the year.

Open and compact, with acres of idyllic parkland, Belfast could not be easier to get around and explore on foot. Belfast encompasses the **historic cultural heartland of the Cathedral Quarter**, the **cosmopolitan charms of Queen's Quarter**, the **waterfront development of the Titanic Quarter** and the **cultural diversity of the Gaeltacht Quarter**. Not forgetting the **vibrant City Centre**; Belfast is a City with something for everyone.

Belfast's popularity as a top European destination is measured by footfall and spend, as revealed in the 2005 research findings.

Record Year for Belfast

A remarkable 6.4 million people visited Belfast in 2005, that's up an impressive half-a-million on the previous year. Those visitors made a huge contribution to the local economy too, **spending a total of £285.2 million** while in the City, thus **helping to support 15,686 full-time jobs**.

1.2 million of these visitors were out of state and contributed in large part to this overall amount, **spending an astonishing £135.4 million in the City**.

With **5.2 million indigenous visitors to the City**, they managed to top even this figure, with a **substantial total spend of nearly £150 million**.

Belfast welcomed **over 1 million overnight visitors**, 72% of which stayed in commercial accommodation with the duration of stay averaging 3 nights. Taking visitor numbers and average duration of stay into account, **the total number of visitor nights spent in commercial accommodation increased by 25% from 2004**.



5.2 million day trippers in 2005, who spent a total of £147 million



Out of 1.2 million overnight visitors, 916,000 were out of state



Day and Night... Belfast is Buzzing

By Day

Our domestic market (Northern Ireland) continues to play an important role in the Belfast Tourism Success Story, particularly when it comes to day visits. Of the **5.2 million day trippers in 2005**, who **spent a total of £147 million** between them, **almost 95% came from Northern Ireland**. Out of state day trippers included 3.6% from Great Britain, 1% from the Republic of Ireland, 0.2% from Europe and 0.2% from North America and 0.2% from other parts of the world.

By Night

As you would expect, out of state visitors were responsible for a much greater percentage of overnight stays. **Out of 1.2 million overnight visitors, 916,000 were out of state** - 672,000 came from Great Britain, 121,000 from the Republic of Ireland, 39,000 from North America, 35,000 from Europe and 49,000 from the rest of the world. **In total the out of state overnight visitors spent £123.2 million in Belfast.**

Belfast is Buzzing!



Over half (51%) of all visitors revealed that they were drawn to Belfast by pure holiday factors

19% of overnight visitors and 21% of day trippers came specifically to visit a particular attraction

Motivating Factors

Of the many reasons to visit Belfast, **over half (51%) of all visitors revealed that they were drawn to Belfast by pure holiday factors** - to holiday and to enjoy Belfast's scenery and relaxing ambiance. **Visiting friends and relatives was another principal motivator helping to attract 24% of all visitors.** While **12% came on business or to attend a conference**, a sign of Belfast's growing importance as a conference destination.

It is interesting to note that visitors were attracted to Belfast all year round.

The figures also reveal that people are choosing to visit Belfast on a frequent basis. **20% of visitors to Belfast in 2005 were regular visitors**, coming at least once every few years. The continuing success of Belfast's marketing strategy and its growing status around the world was reflected in the fact that 68% of out of state visitors were coming to the City for the first time.

The Belfast Appeal

As a **short break and holiday destination**, Belfast has become one of the most popular choices in Europe and the word is obviously getting around. Clearly reflecting the growing interest in Belfast around the world, a striking proportion of visitors cited **'curiosity'** about the City as the motivation behind their decision to visit. This was true of 42% of overnight visitors and half (50%) of day trippers.

Belfast's unique appeal attracted 16% of overnight visitors and 12% of day trippers, who felt the City was **'somewhere a bit different'**. An **interest in Belfast's political history** accounted for 12% of overnight visitors and 8% of day trippers who acknowledged they were **'curious about the Troubles'**.

With such an abundance of attractions, world-class concerts and shows, as well as the number of budget airlines making flying to Belfast so reasonable, it is no surprise that **19% of overnight visitors and 21% of day trippers came specifically to visit a particular attraction.** For instance, 5% of overnight visitors and 10% of day trippers came to visit an exhibition, while Belfast's atmospheric pubs were the lure for 10% of overnight visitors and 8% of day trippers.



£27.7 million on the elaborate range of Belfast's eating out establishments

Overall, 74% of day trippers and 83% of overnight visitors enjoyed at least one City Centre attraction



A Profusion of Attractions

Overnight visitors and day trippers were in agreement – out of Belfast's many wonderful attractions, **they made visits to City Hall and bus tours of the City their top choices in 2005.** A strong 61% of overnight visitors made City Hall their first choice, along with 48% of day trippers.

Bus tours have increased somewhat in popularity in the last year and are now the second most popular visitor attraction in Belfast, chosen by 14% more day trippers and 13% more overnight visitors than in 2004.

The Botanic Gardens were particularly popular with overnight visitors with a third (33%) of these visitors and 14% of day trippers paying a visit to this charming Queen's Quarter park. The **Crown Liquor Saloon testifies to its reputation as one of the world's most famous Victorian pubs** with a high 28% quota of overnight visitors passing through its doors. The **captivating historical Queen's University Lanyon Building** was an architectural must-see and welcomed 26% of overnight visitors and 11% of day trippers.

Overall, 74% of day trippers and 83% of overnight visitors enjoyed at least one City Centre attraction.

It's not just bus tours whose popularity has rocketed. With so many fascinating tours by foot, boat and taxi now available as well, perhaps it is no surprise that a massive **70% of visitors took a City tour of some sort while in Belfast.** This was particularly true of out of state visitors, of whom 44% took a bus tour, 11% took a walking tour, 10% took a taxi tour and 5% enjoyed a boat trip, either Titanic-themed or down the Lagan River.

A Boost to Belfast's Economy

The importance of tourism to Belfast's economy was highlighted by the **incredible £285.2 million spent by visitors during 2005.** The contribution of out of state visitors was, once again, vital, bringing some £135.4 million to Belfast during the year. A significant £91.9 million of that was spent by visitors from Great Britain, with Republic of Ireland visitors responsible for a further £22.6 million. Of that overall total (£135.4) **£123.2 million was spent by out of state overnight visitors.**

How did they choose to spend their money?

Well, Belfast's retail therapy offering was a big draw again, with £35.7 million being spent on shopping, £27.7 million on the elaborate range of Belfast's eating out establishments, £24.6 million on the varied accommodation available, £22.2 million on the diverse mix of entertainment in the City and £13 million on transport.

The **overnight visitors from Great Britain were the biggest spenders - with a total spend of £82.6 million.** A further £22.7 million was spent by visitors from the Republic of Ireland, £3.5 million by Europeans, £6.9 million by North American visitors and £7.5 million by the rest of the world.

Closer examinations of that spend reveals that **visitors staying overnight while visiting friends and relatives spent £29 million.** Shopping (42%) was their main beneficiary, but eating out (24%) and clubs, pubs and cinemas (23%) were also popular.

The domestic market also played a big role in boosting the local economy, with a massive £149.8 million overall spend in Belfast.

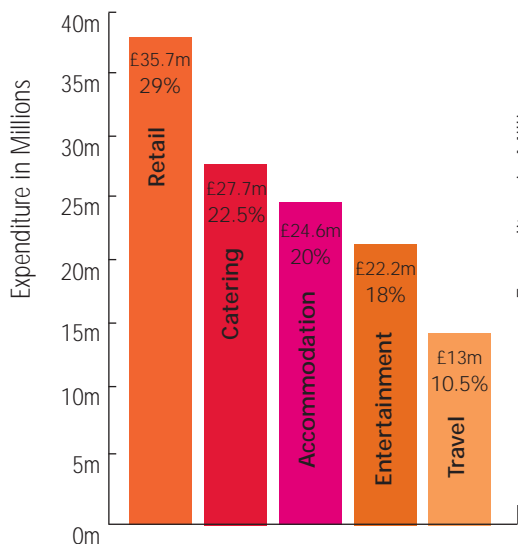
Total Number of Visitors: 6.4 million



Total Expenditure: £285.2 million

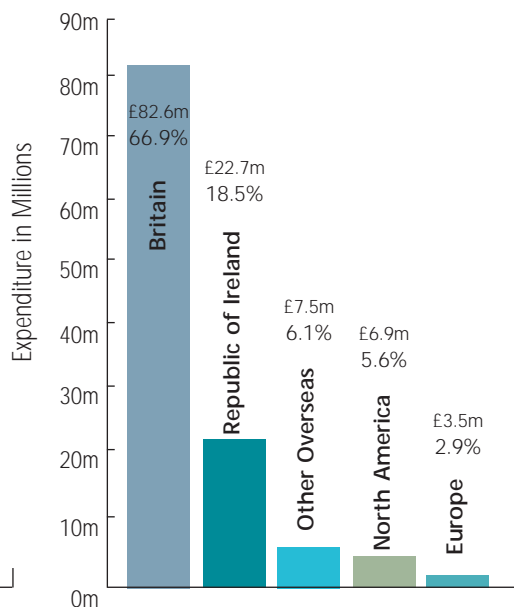
Out of State

Overnight Visitors - Allocation of Expenditure
Total £123.2 million

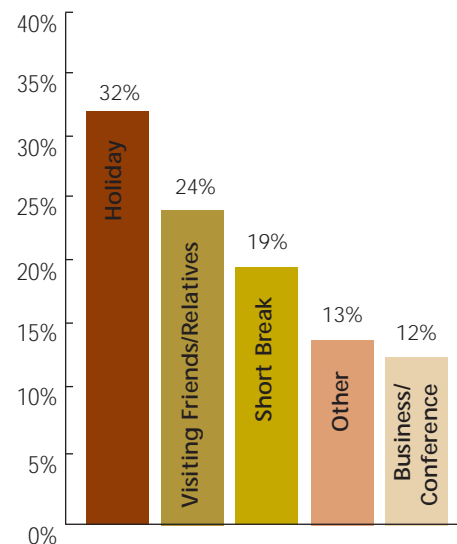


Out of State

Overnight Visitors - Expenditure by Market
Total £123.2 million



What Attracted People to Belfast?



Tourism Performance 2005

Total Number of Visitors	6.4m
Total Expenditure	£285.2m
Total Overnight Visitors	1,163,000
Total Overnight Expenditure	£138.2m
Number of Out of State Overnight Visitors	916,000
Out of State Overnight Expenditure	£123.2m
Total Day Trippers	5.2m
Total Day Visitor Expenditure	£147m
Out of State Day Visitors	271,000
Out of State Day Visitor Expenditure	£12.2m



One of the most important conference and exhibition destinations in Europe



Business visitors also take the opportunity to experience Belfast's cultural highlights and in doing so are also great advocates for Belfast tourism

Premier Conference Destination

Over the last few years Belfast has become one of the most important conference and exhibition destinations in Europe, offering world-class venues that range in size from intimate hotels to the huge capacities of internationally ranked locations such as the Belfast Waterfront Hall and the Odyssey.

The majority of the conference delegates who came to Belfast in 2005 were from Great Britain (61%), with a further 12% from Europe and 8% from North America. Some 6% came from the Republic of Ireland and 13% from the rest of the world. Of the out of state delegates, 60% were visiting Belfast for the first time, while 1 in 10 were regular visitors.

The City clearly made a good impression with **70% of the out of state delegates expressing a desire to return to Belfast for a leisure break and 75% willing to recommend Belfast to their family and friends** - trends which augur well for the increasing popularity of tourism in the City.

Good Business Sense

Once more **the great majority of overnight business visitors were from Great Britain with 76%** and a small percentage (7%) coming from the Republic of Ireland. Significantly, almost two thirds of these business overnight visitors were frequent visitors to Belfast, spending an average of 3.4 nights in the City. Business visitors also use other amenities in the City outside their accommodation with 70% of them dining in one of Belfast's many eateries and 47% visiting one of the Belfast's atmospheric bars.

Business visitors also take the opportunity to experience Belfast's cultural highlights and in doing so are also great advocates for Belfast tourism. Over two-thirds expressed an interest in visiting again for leisure purposes, and more than 4 in 5 are willing to recommend Belfast as a holiday destination to family and friends. Belfast's famous friendliness came up trumps again - it was cited by 27% of business visitors as one reason they would return to Belfast.



Some 41% of day trippers and 63% of overnight visitors arrived in Belfast by air

...a one-stop Tourist Information Centre



Ease of Access

The majority of out of state **visitors continue to access Northern Ireland directly** rather than via the Republic of Ireland with 74% of out of state overnight visitors and 62% out of state day trippers doing so.

Some 41% of day trippers and 63% of overnight visitors arrived in Belfast by air. Of these air passengers, there was a marked rise in the numbers using Belfast International Airport (66%) as against Belfast City Airport (30%). This may reflect the larger numbers of popular low cost airlines, such as Easyjet, and also the large numbers of new direct flight routes which have been introduced over recent years; and more continue to be developed.

The **cruise ship market is becoming increasingly popular with more and more docking at Belfast.** This figure has increased by 6% to 11%. With further marketing and awareness of Belfast tourism products this market can only continue to grow and prosper.

Belfast Welcome Centre

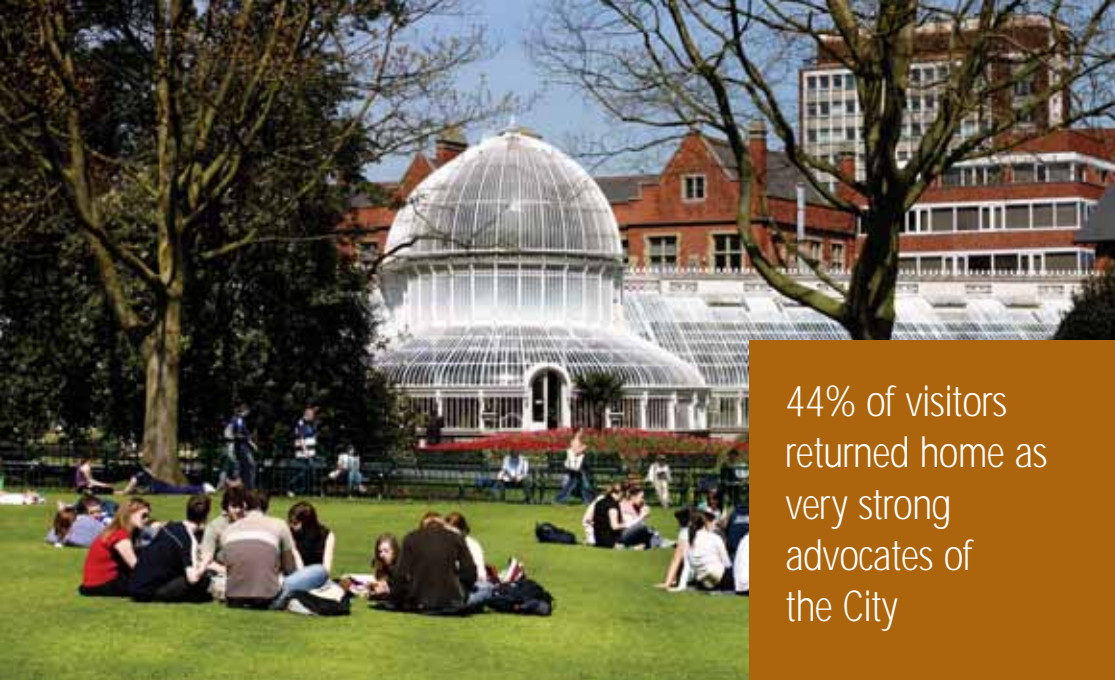
The Belfast Welcome Centre is a one-stop Tourist Information Centre, which provides visitors with information on everything they will need for their stay - from free literature and information to accommodation booking and entertainment.

Its multi-lingual staff offers a range of services including an all-Ireland accommodation reservation service, an internet café, a Bureau de Change, a superb range of local gifts and crafts and free leaflets and brochures.

There was a significant rise in out of state overnight visitors utilizing the services of the Belfast Welcome Centre in 2005, up 7% on the previous year to 29% in 2005. Satisfaction levels with the centre were very high too, with **90% of visitors expressing satisfaction with the welcome they received, 84% being satisfied with the range of information available** and a positive **508 out of 519 interviewees being satisfied with the choice of gifts and souvenirs on offer.**

Over 30% of overnight visitors, including regular visitors and first-timers, used the Belfast Welcome Centre during their stay, a figure nearly matched by day trippers (28%).

Visitor awareness of the Belfast Welcome Centre was largely through advice from family or friends, or picked up via tourist guides, signs or maps. A positive 90% of visitors found the tourist signs available in the City to be of use and nearly all visitors rated the Belfast Visitor Map as useful, with two thirds finding it very useful.



44% of visitors returned home as very strong advocates of the City

Promising Trends for the Future

The global-wide marketing of Belfast as a world-class destination for tourism and business travellers has paid extraordinary dividends over the last few years and figures for 2005 show that a positive trend is continuing.

It's been another record year for Belfast's tourism industry, with the arrival of an incredible 6.4 million visitors, an increase of 8.5% on the previous year. The influx of visitors has been great news for Belfast business too; with the overall tourism spend up 8.7% on the previous year at a phenomenal £285.2 million.

The research for 2005 also reveals promising trends for the future with Belfast clearly matching expectations. Nearly 90% of visitors would recommend it to their friends and family, while 44% of visitors returned home as very strong advocates of the City.

Overall, the 2005 Tourism Monitor reveals that Belfast is continuing to meet and exceed tourist expectation and demand. The City has reached very high standards in all aspects of its tourism offering but to maintain its status in such a competitive marketplace Belfast is continually developing its tourism product offer.



The global-wide marketing of Belfast as a world-class destination for tourism and business travellers has paid extraordinary dividends over the last few years and figures for 2005 show that a positive trend is continuing



Over half (52%) of all out of state visitors were highly positive about things to do and see in Belfast



An impressive 55% rating their accommodation very highly



Visitor Satisfaction

Despite the increasing popularity of Belfast as a tourist destination it is important not to be complacent and it is vital to get as complete a picture as possible of the strengths and weaknesses of our tourism offering. In 2005, visitors were asked to rate different aspects of their visit to Belfast on a scale of 1-to-10, with 1 representing an extremely poor performance and 10 an extremely good one.

The Belfast Welcome

Clearly the warmth of the Belfast welcome is one of the most important factors for visitors. A remarkable **73% of visitors were very positive about the welcome they received**, which they gave an impressive rating of 8.25.

Visitor Attractions

Another plus - **over half (52%) of all out of state visitors were highly positive about things to do and see in Belfast**, giving the City an overall rating of 7.54.

Nightlife & Entertainment

With an overall rating of 7.77, **Belfast's nightlife and entertainment were rated very highly.**

Eating Out

The diversity of eating experiences available in the City was praised by nearly half of all visitors (47%), achieving an overall rating of 7.70. However, there was slightly less satisfaction on the issue of cost in relating to eating out, which scored a rating of 6.36. As in previous years, there is a strong relationship between impressions of the cost of eating out in Belfast and the country of origin of the visitor.

Accommodation

The strength of Belfast's accommodation sector was reflected in an overall satisfaction rating of 7.56 by out of state overnight visitors, with an **impressive 55% rating their accommodation very highly** at 8 or above. There was a strong approval for the range of accommodation on offer too with a score of 7.15 and the quality it rendered at 7.56.



In 1999 Belfast City Council set up the Belfast Visitor and Convention Bureau to promote Belfast as a business and leisure tourism destination



The Belfast Tourism Monitor is an extensive programme of primary and secondary research

Appendix

The Belfast Tourism Monitor is an extensive programme of primary and secondary research commissioned by Belfast City Council and carried out by Millward Brown Ulster. Its main aim is to assess tourism performance in Belfast and its impact upon, and benefits, to the wider local economy.

Data was collected and analysed using two distinct categories as defined by the World Tourism Organisation:

Overnight Visitor

- The trip is taken in a place other than that of the usual environment.
- The stay in the place visited does not last more than 12 consecutive months.
- The purpose of the trip is other than the exercise of an activity remunerated from within the place visited.

Tourism Day Visitor

- Those travelling from their usual place of residence to Belfast.
- Those travelling away from home for 3 hours or more but less than one day for the purposes of leisure or business.
- Those for which Belfast is outside their usual environment and to which they travel on a non-routine basis.

Method

Belfast Tourism Monitor is based on a multi-staged research programme designed to establish an accurate picture of tourism performance in Belfast. Surveys with 1,200 out of state visitors (overnight and day-trippers) were undertaken at 30 different locations within Belfast during the summer and autumn periods. At the same time interviews with 5,000 Northern Ireland residents established the nature and level of indigenous day trips to Belfast and the nature of overnight stays within Belfast where tourists selected to stay with family and friends. In addition an on-line monitor measured levels of occupancy in the commercial accommodation sector. This, combined with air traffic movements, ferry and train carryings, built a picture of the overall volumes of out of state tourists.

Calculation of 15,686 full time equivalent jobs is based on Northern Ireland Economic Research Centre (NIERC) estimation of a ratio of 55 FTE jobs per one million of direct tourist expenditure.

Belfast Visitor and Convention Bureau

In 1999 Belfast City Council set up the Belfast Visitor and Convention Bureau, in partnership with the private sector and the Northern Ireland Tourist Board, to promote Belfast as a business and leisure tourism destination. The Bureau is based in Donegall Place along with the Belfast Welcome Centre.