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# Belfast City Council Tourism Monitor Events Evaluation

**TALL SHIPS ATLANTIC CHALLENGE**

**AUGUST 2009**



 **MillwardBrownUlster**

Impact • Quantitative • Intelligence • Loyalty • Online • Measurement • Clarity • Attitudes • Marketing • Internet • Conceptual • Emotion  
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Advertising • Evaluation • Multicultural • Information • Opportunity • Qualitative • Crossmedia • Optimisation • Global • Attitudes • Predictive

## BACKGROUND & METHODOLOGY

- ❑ Millward Brown Ulster have conducted the Belfast Tourism Monitor since 2002. The project examines visitor numbers, the visitor profile and the economic impact of tourism to the Belfast City Council area.
- ❑ The Belfast Tourism Monitor encompasses a suite of different surveys including a visitor survey, accommodation monitor, conference delegate survey, business visitor survey and events economic monitoring. The data derived from the surveys is used to model the impact of tourism in Belfast across the full year in order to calculate the net economic benefit of the industry to the city.
- ❑ Each year the events economic monitor measures visitor profiles, spend & attitudes at key events run by Belfast City Council culminating in calculation of total economic impact of each event.
- ❑ Typically 8-10 events are covered across the course of one calendar year.

## BACKGROUND & METHODOLOGY

- ❑ The events monitor is conducted via a face to face interview methodology, with recourse to conduct a proportion a post event telephone interviews where respondents don't have time to participate in a 10 minute interview at the event.
- ❑ The fieldwork for the Belfast Tall Ships 2009 event was conducted between Thursday 13<sup>th</sup> and Sunday 16<sup>th</sup> August.
- ❑ We employed a random sampling method with every nth person passing a designated point being approached for interview. On each day 5 Millward Brown interviewers were in attendance interviewing at a number of locations across the Belfast event site.
- ❑ The majority of interviews were conducted face to face on site, with a small proportion being conducted post event via telephone. All post event interviewing was conducted within three working days of close of event.
- ❑ We interviewed a total of 413 respondents. All fieldwork complied fully with the Market Research Society ethical Code Of Conduct.

## EXECUTIVE SUMMARY

- ❑ Visitors from Greater Belfast spent on average £11.87 during their visit. In the case of visitors from elsewhere in Northern Ireland average spend was £13.92 per head. Out of state visitors' spend per head was much higher at £58.54.
- ❑ The gross level of spending in Belfast associated with the event is estimated at over **£8.3 million.**
- ❑ Net additional expenditure in Belfast, that is the expenditure associated with the visitors who would not have come to Belfast had the event not been staged is estimated at over **£8 million.**
- ❑ Allowing for the direct and indirect expenditure generated as a result of this net additional expenditure the total estimated economic impact to Belfast of the Belfast Tall Ships event is over **£14.5 million.** These being the monies brought to the City as a direct result of staging the Belfast event.
- ❑ In addition to this out of state attendees who came to Belfast specifically for the Tall Ships event spent almost £300,000 outside Belfast. Taking into account indirect and induced expenditure we estimate the total economic impact of the Belfast centric element of the Tall Ships event to be in excess of **£15 million.**

## EXECUTIVE SUMMARY

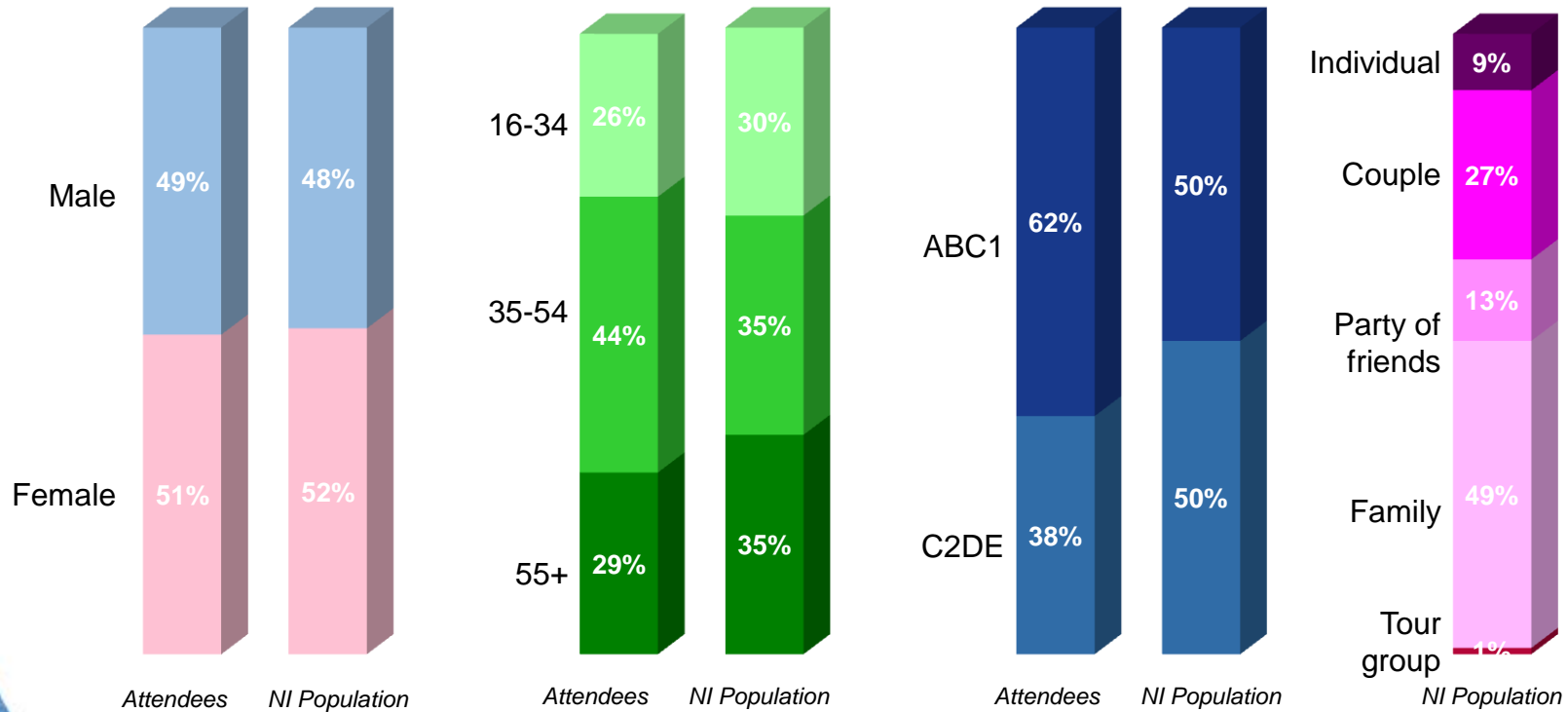
- ❑ Visitors to the Belfast Tall Ships 2009 event were most likely to be from an ABC1 background and aged 35-54. Visitors were most likely to be attending as a family.
- ❑ Over a third (35%) of those visiting the Belfast event were from Greater Belfast. More than half (51%) were from the rest of Northern Ireland whilst 8% were from outside Northern Ireland.
- ❑ Less than a third (30%) of visitors to the Belfast Tall Ships 2009 event had visited the Maritime Festival previously.
- ❑ Advertising was the most popular source of information about the Belfast Tall Ships 2009 event; Almost all respondents (96%) saw or heard some advertising for the event. The most frequently mentioned media medium cited as source information on the event was television (79%).
- ❑ More than four fifths (85%) of those who visited the Belfast Tall Ships 2009 event would not have visited Belfast that day had the event not been staged.

## EXECUTIVE SUMMARY

- ❑ Regarding the rating of the Belfast Tall Ships 2009 event by those who attended:
  - 94% of visitors rated the event positively (6+) and 83% rated it very positively (8+).
  - 89% stated that the event had met or exceeded their expectations
  - 88% would recommend attending a similar event such as the Belfast Maritime Festival to family and friends.
  - 85% intend to revisit a similar event such as the Belfast Maritime Festival in the future.
  
- ❑ More than two fifths (41%) of respondents could not think of any improvement that could be made to the Belfast Tall Ships 2009 event.
  
- ❑ More than two thirds (68%) of respondents participated in no further activity whilst in Belfast for the Tall Ships event. The most popular additional activities were eating out (21%) and shopping (15%).
  
- ❑ The most popular attraction the Belfast event site was the ships (59%).

## ANALYSIS OF SAMPLE

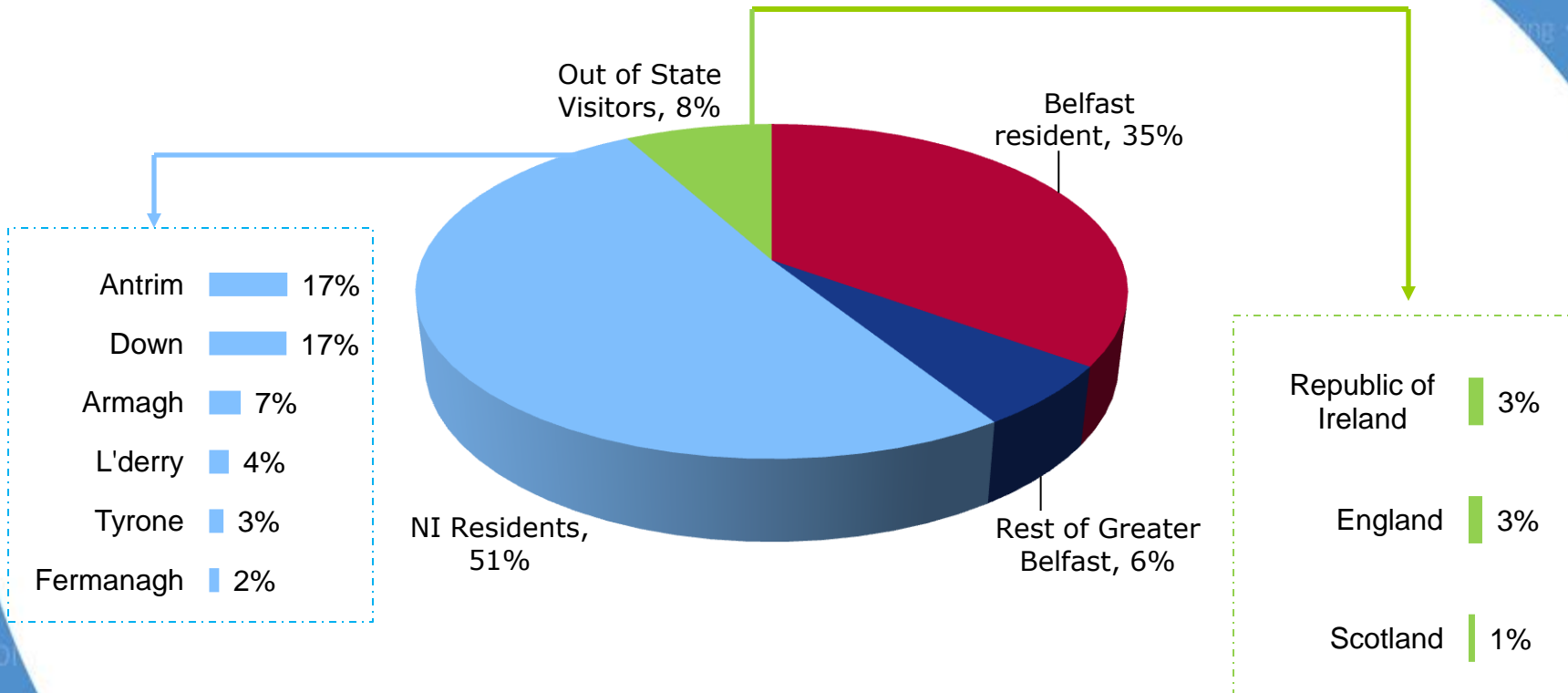
(Base: All respondents - 413)



- The Belfast Tall Ships 2009 event attracted almost an exactly even proportion of males and females (49% / 51%).
- In terms of socio-economic group the event attracted a larger proportion of respondents from an ABC1 background (62%).
- In terms of age the event was most attractive to the 35-54 age group (44%).
- Those visiting the event were most likely to be attending as a family (49%).

# COUNTRY OF ORIGIN OF EVENT ATTENDEES

[ Base: All Respondents - 413 ]

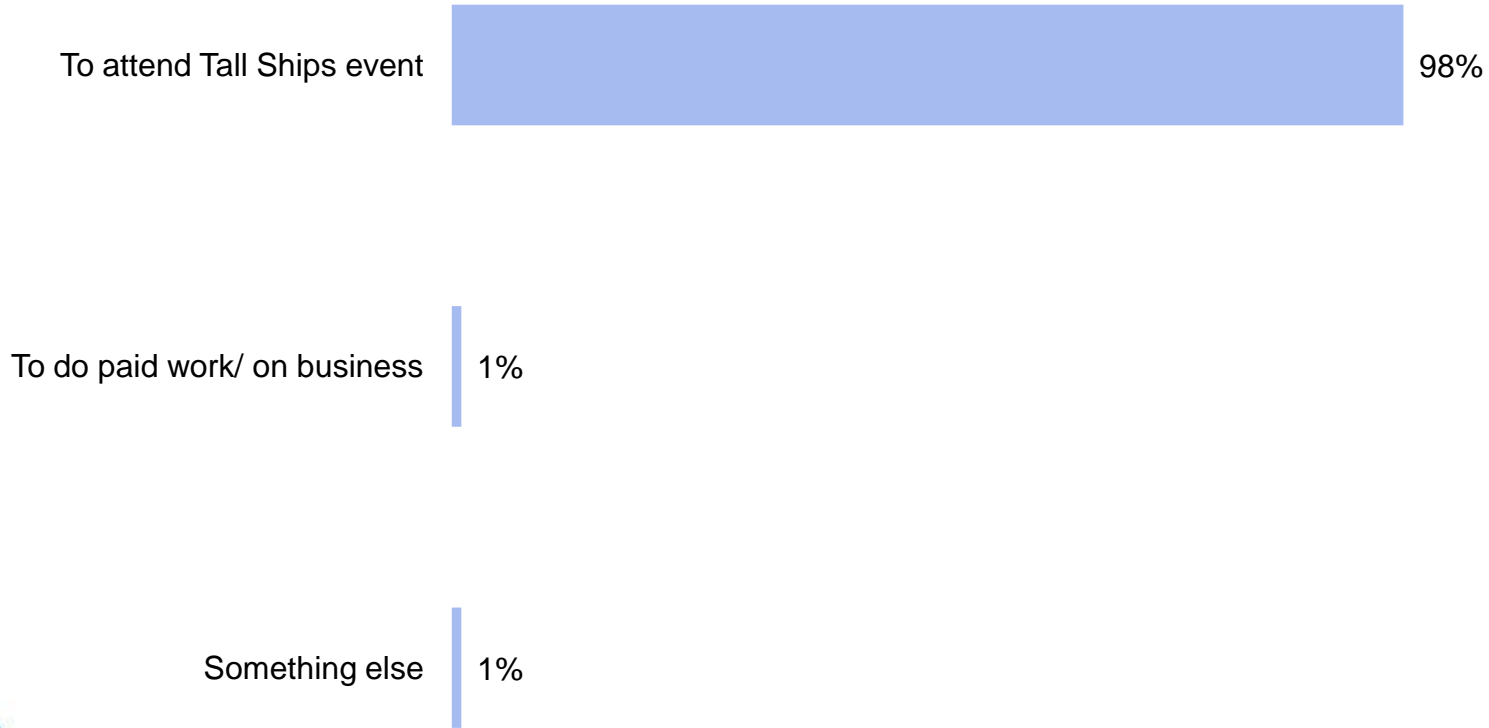


- Over a third (35%) of those attending were Belfast City Council residents and a further 6% came from the outer Belfast area. Greater Belfast accounting therefore for two fifths (41%) of visitors.
- Half of visitors were from elsewhere in Northern Ireland (51%), principally from the rest of County Antrim(17%) and the rest of County Down (17%)
- Under 1 in 10 (8%) who attended the event were from outside Northern Ireland (primarily from Great Britain and Rep. of Ireland).



# MAIN REASON FOR TRIP TO BELFAST

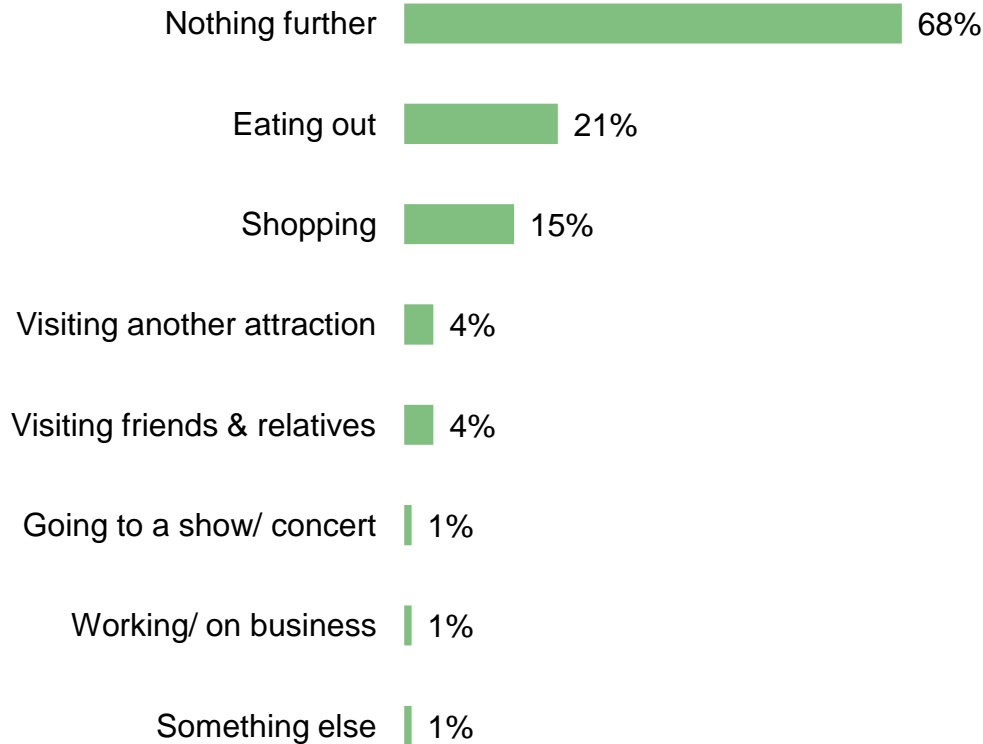
[ Base: All Respondents - 413 ]



•The vast majority of attendees (98%) to the Belfast event site stated that the Tall Ships were their main reason for visiting Belfast.

## OTHER ACTIVITIES PARTICIPATED IN TODAY

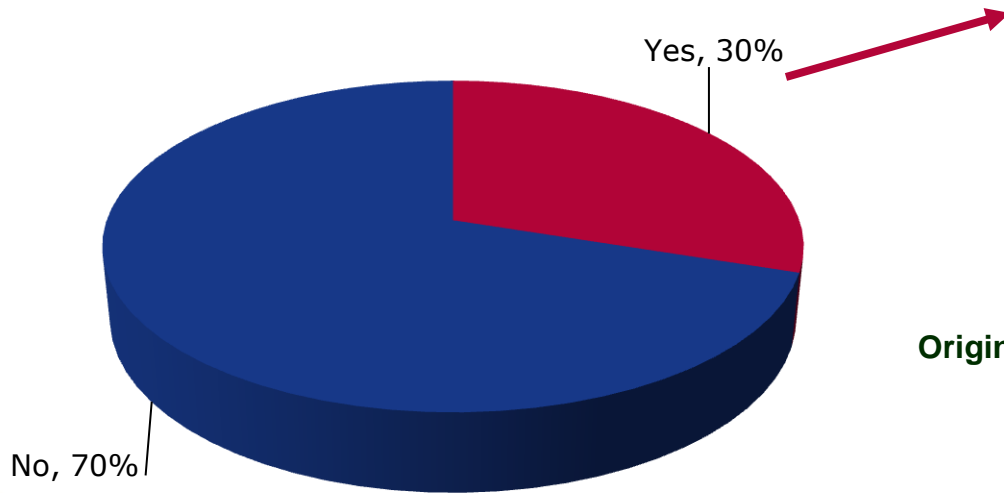
[ Base: All Respondents – 413 ]



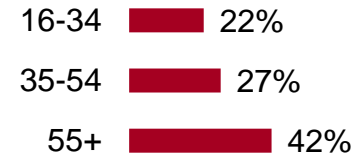
- More than two thirds (68%) of those attending Belfast Tall Ships 2009 event did not take in (or plan to take in) any other activity in Belfast that day.
- Of those who did participate in another activity the most popular activities were eating out (21%) and shopping (15%)

# PREVIOUS ATTENDANCE AT MARITIME FESTIVAL

[ Base: All Respondents – 413 ]



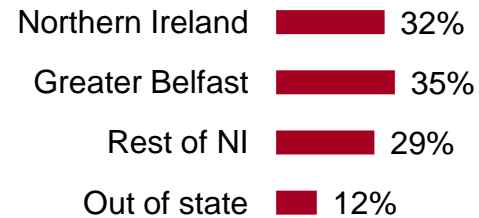
## Age:



## Class:



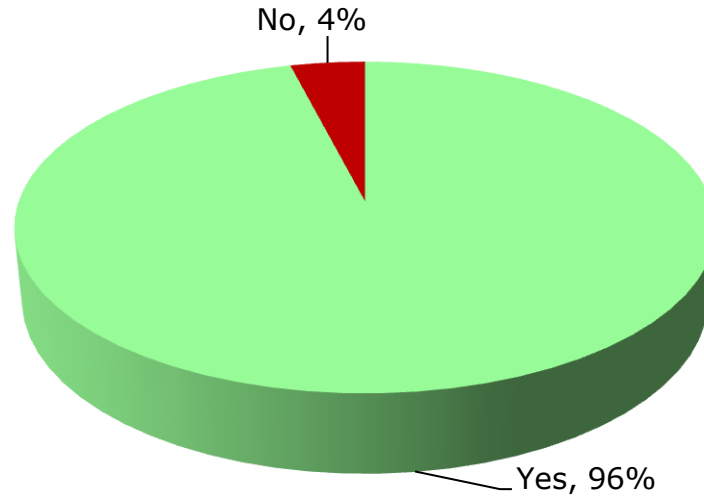
## Origin Of Visitor:



- Less than a third of those attending the event (30%) had previously attended the Belfast Maritime Festival.
- Previous attendance was highest amongst those aged 55+ (42%).

## HEARD OR SAW ADVERTISING FOR THE EVENT

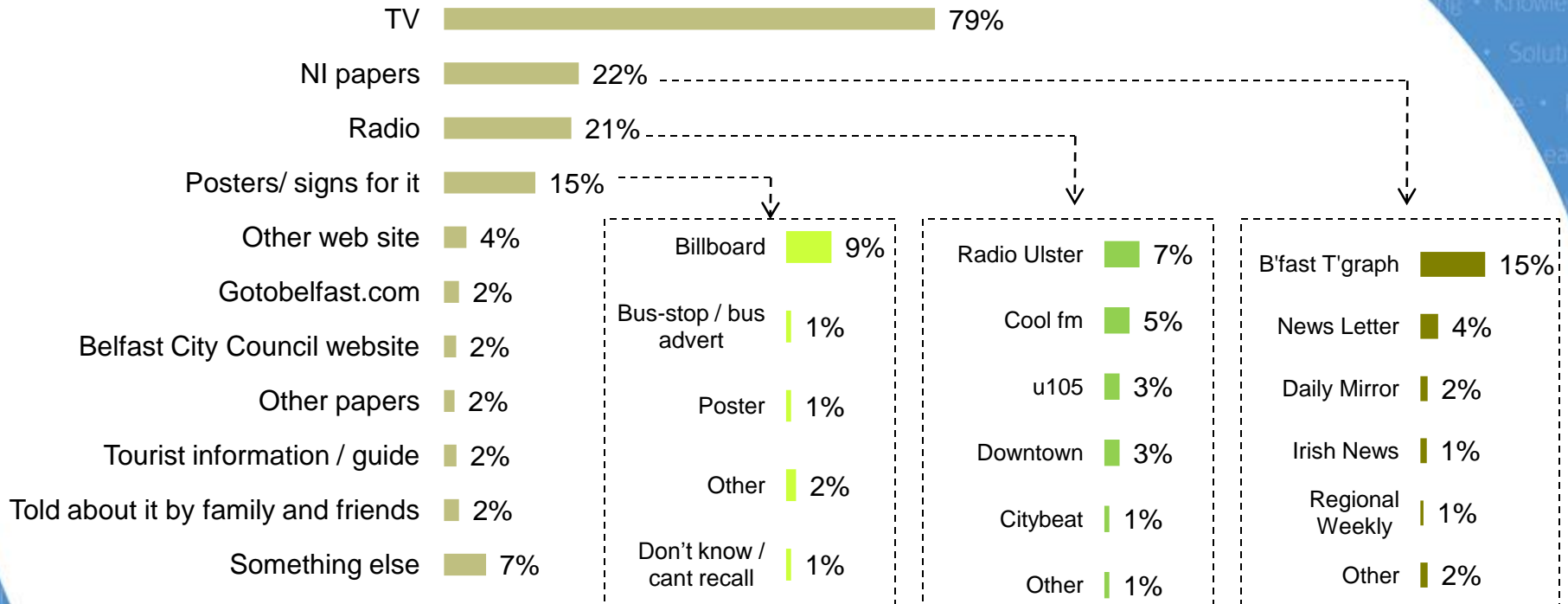
[ Base: All Respondents – 413 ]



•Advertising in media formed the major communications platform for the Belfast Tall Ships 2009 event with 96% of those who attended the event having seen or heard the event advertised.

# SOURCES OF INFORMATION ABOUT TALL SHIPS EVENT

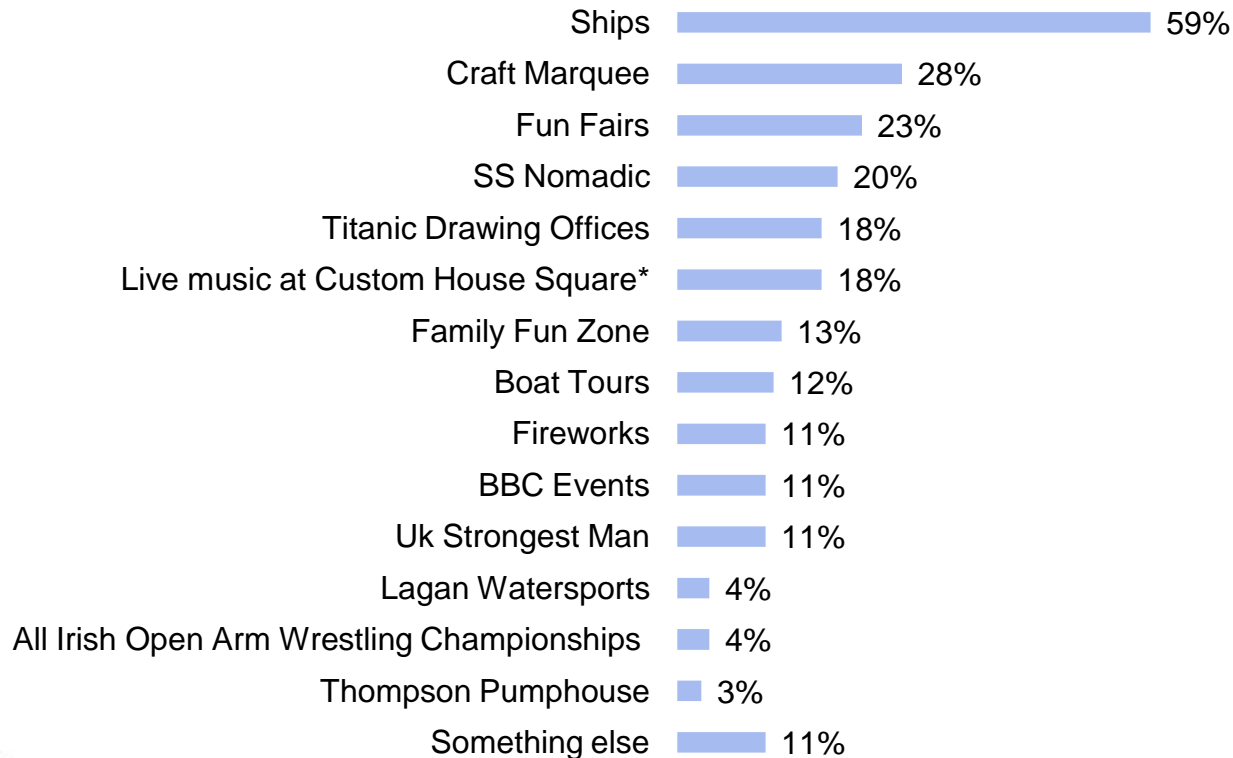
[ Base: All respondents– 413 ]



• The main sources of information on the event were TV (79%), NI papers (22%), Radio (21%) and posters / signs (15%).

# ATTRACTIONS ATTENDED AT EVENT

[ Base: All Respondents – 413 ]



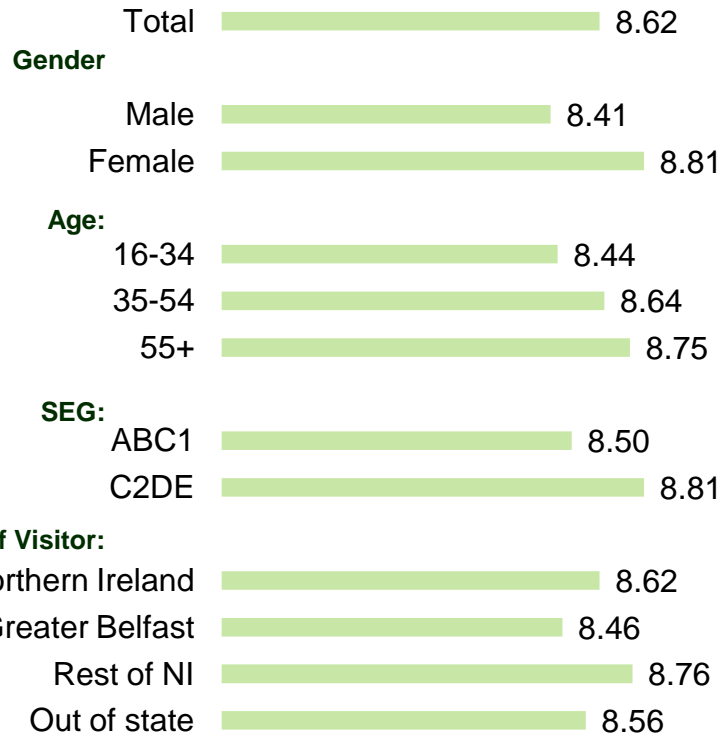
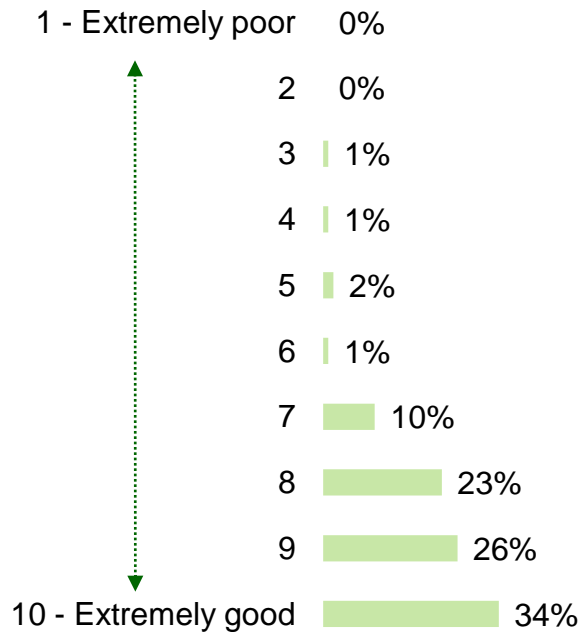
- The most popular attraction at the Belfast Tall Ships 2009 event was the ships themselves with almost three fifths (59%) stating that they had or were planning to visit the ships.

- Other popular attractions were the Craft Marquee (28%), Fun Fairs (23%) and the SS Nomadic (20%).

- **\*NB: the figure for Live Music may be inflated due to confusion with other free music events in the immediate vicinity of Custom House Square.**

# RATING OF EVENT

Min=1 & Max=10

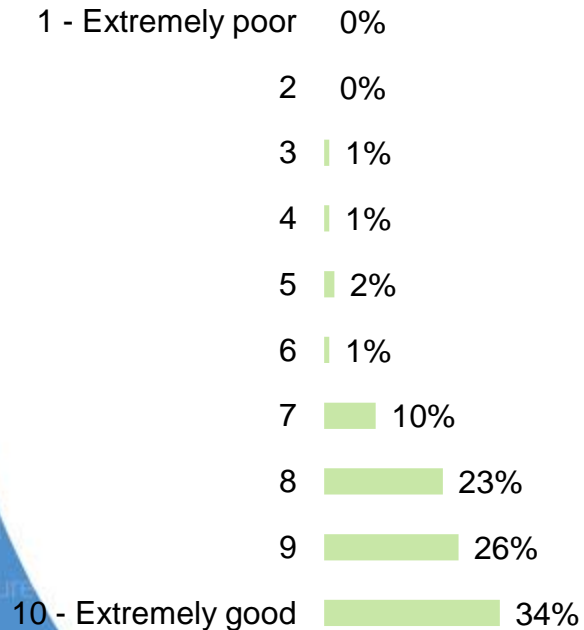


- The overall rating of the Belfast Tall Ships 2009 event was very positive with an average rating of 8.62 out of a possible 10.
- Females and those from a C2DE background were most impressed with the event.

# RATING OF EVENT

## Rating of Tall Ships 2009 Event

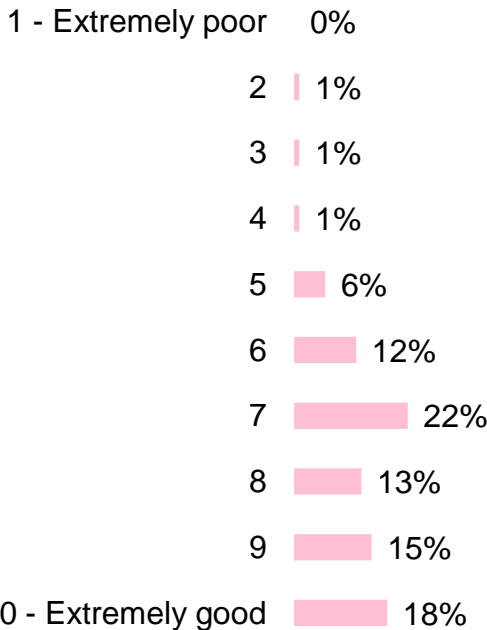
[ Base: All respondents – 413 ]



Average 8.62

## Rating of Previous Similar Event – Maritime Festival

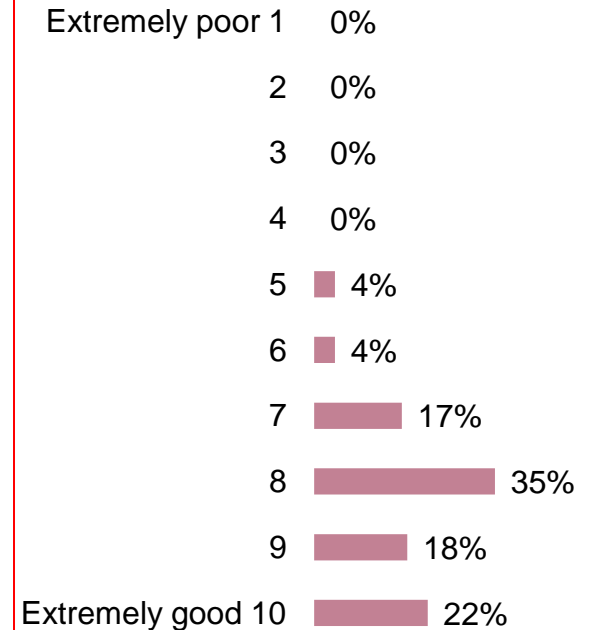
[ Base: Previously attended – 124 ]



Average 7.72

## Actual Rating of Maritime Festival (2008)

[ Base: All respondents – 100 ]



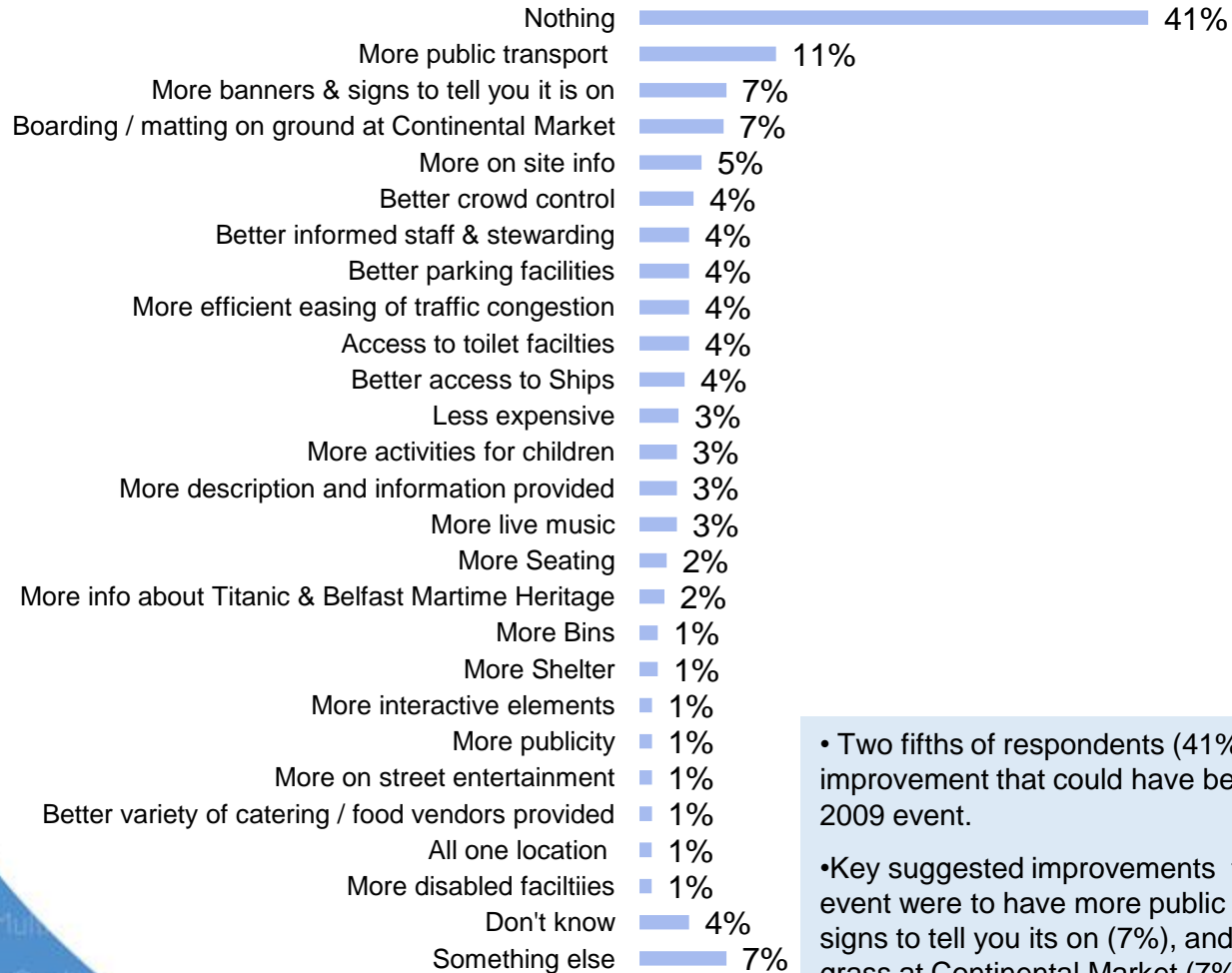
Average 8.25

• Those who attended the Belfast Tall Ships 2009 event rated it more positively (8.62) compared to their previous visit to the Maritime Festival (7.72). Moreover the actual average rating of the Belfast Maritime Festival in 2008 was lower than the average rating of the Belfast Tall Ships 2009 event.



# WHAT COULD HAVE BEEN DONE TO IMPROVE THIS EVENT

[ Base: All Respondents - 413 ]



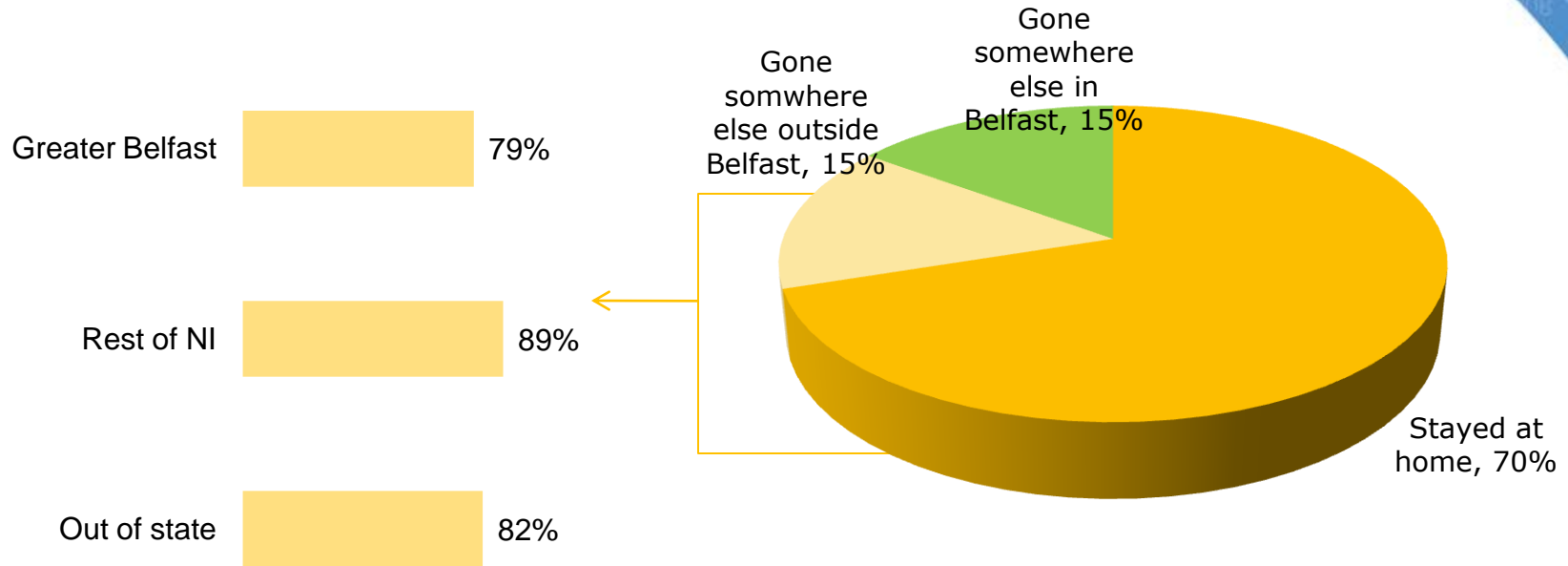
- Two fifths of respondents (41%) could not think of any improvement that could have been made to the Belfast Tall Ships 2009 event.

- Key suggested improvements to the Belfast Tall Ships 2009 event were to have more public transport (11%), more banners & signs to tell you its on (7%), and to have boarding / matting on grass at Continental Market (7%).

# ADDITIONALITY

## – Alternate activities had event not been staged

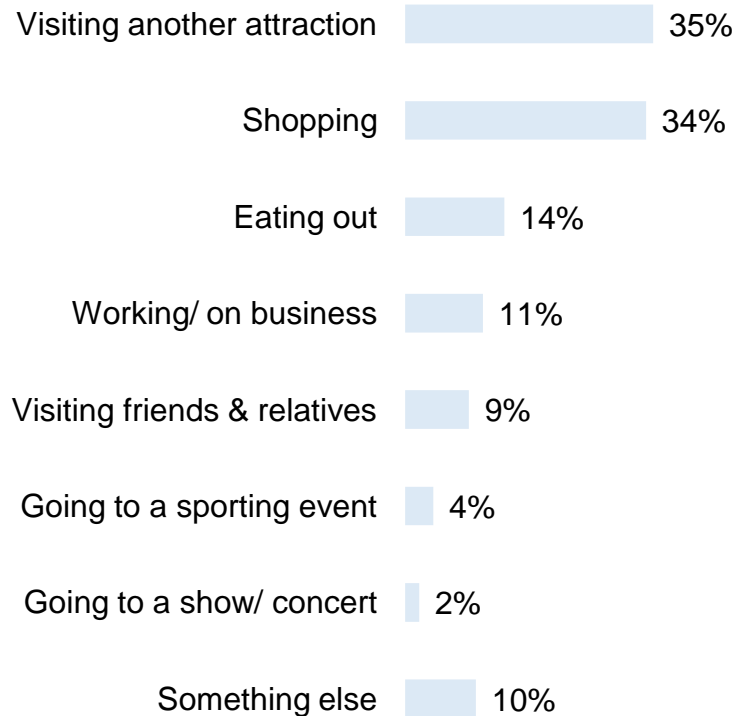
[ Base: All Respondents - 413 ]



- Had Belfast Tall Ships 2009 event not been staged, over 3 in 20 (15%) would have gone somewhere else in Belfast on the day.
- The same proportion (15%) would have gone somewhere else outside Belfast whilst 7 in 10 (70%) would have stayed at home.
- Thus the spend accrued by the 85% who would have stayed at home or gone somewhere outside Belfast can be regarded as the additionality brought about specifically by this event.

# ALTERNATE ACTIVITIES IF EVENT HAD NOT BEEN STAGED

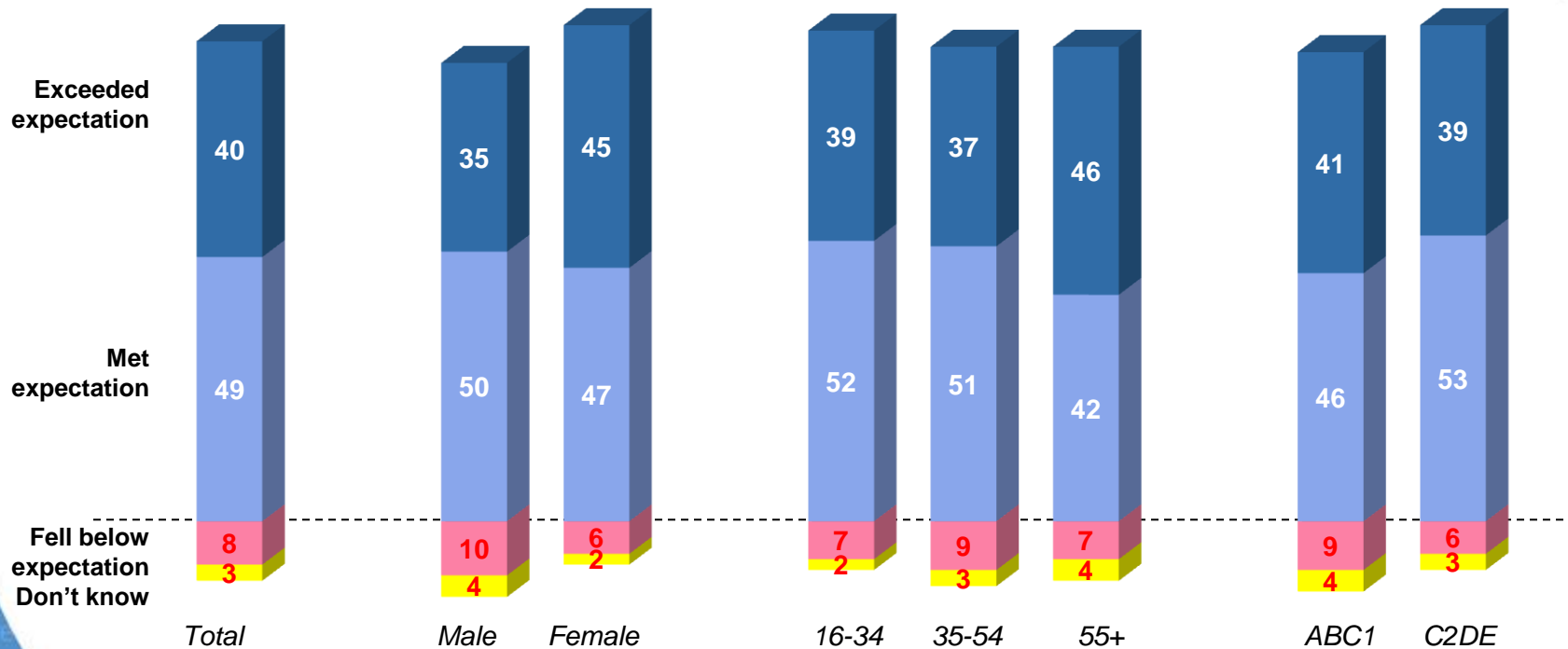
[ Base: All who would not have stayed at home n=125 ]



- Of those who stated they would not have stayed at home a third (35%) anticipated that they would have visited another attraction.
- Shopping was another popular option (34%).

# WHETHER TALL SHIPS EVENT FULFILLED EXPECTATIONS

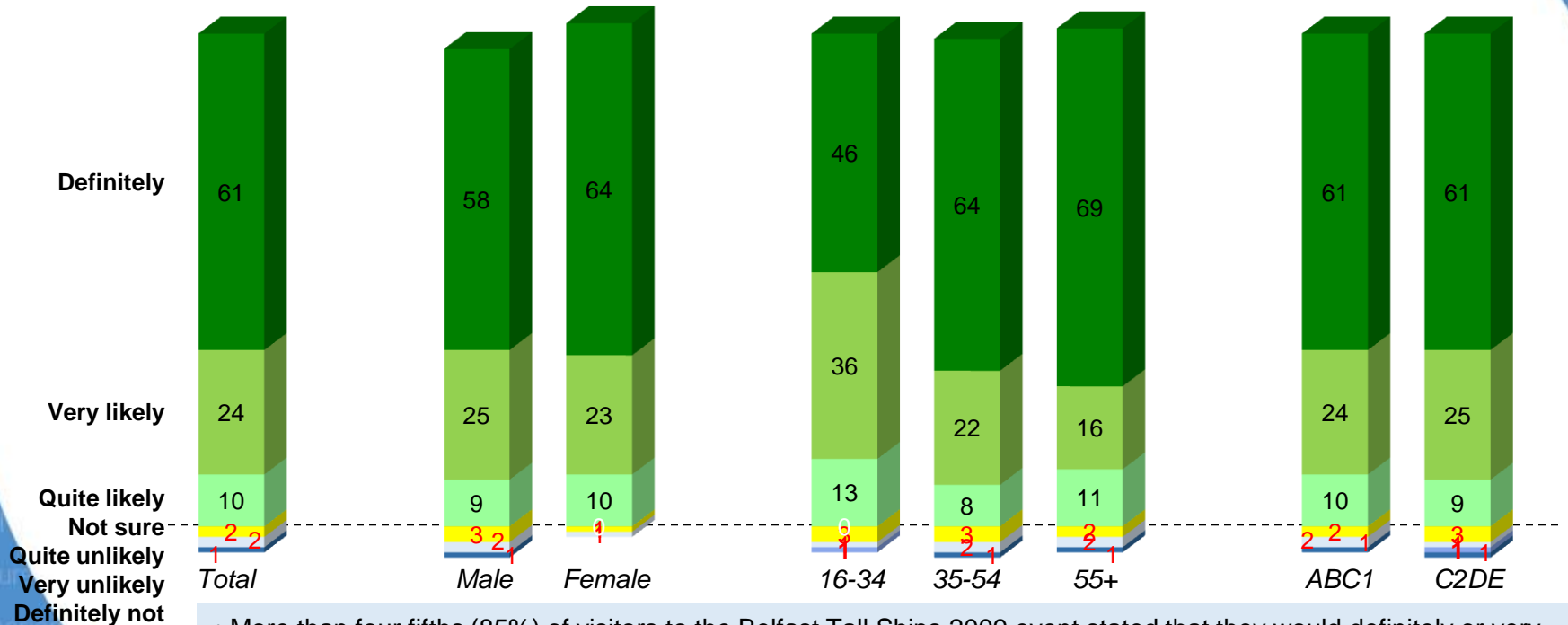
[ Base: All Respondents - 413 ]  
%



- Almost 9 in 10 (89%) of visitors to the Belfast Tall Ships 2009 event stated that the event met or exceeded their expectations.
- Females and C2DE respondents were most impressed with the event.
- Less than 1 in 10 (8%) were not impressed with the event, it having fallen short of their expectations.

# INTENTIONS TO REVISIT SIMILAR EVENT – e.g. MARITIME FESTIVAL

[ Base: All Respondents – 413 ]  
%

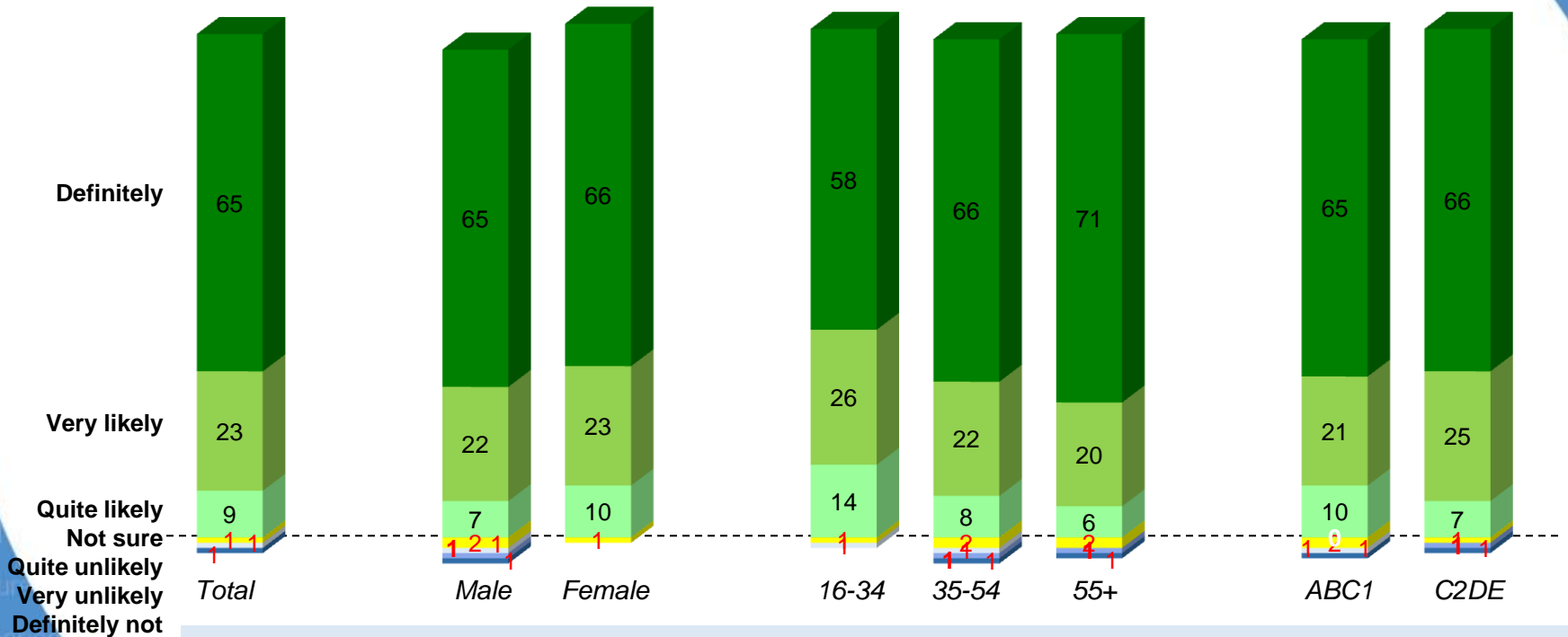


• More than four fifths (85%) of visitors to the Belfast Tall Ships 2009 event stated that they would definitely or very likely revisit a similar event such as the Maritime Festival on another occasion. A further 10% stated that they would be quite likely to revisit the event.

• Overall 95% visitors left with a positive intention to return to a future similar event such as the Maritime Festival. Females and those aged 16-34 were most likely to be strongly keen to revisit a similar event on a future occasion.

# WHETHER WOULD RECOMMEND OTHERS TO VISIT SIMILAR EVENT – e.g. MARITIME FESTIVAL

[ Base: All Respondents – 413 ]  
%

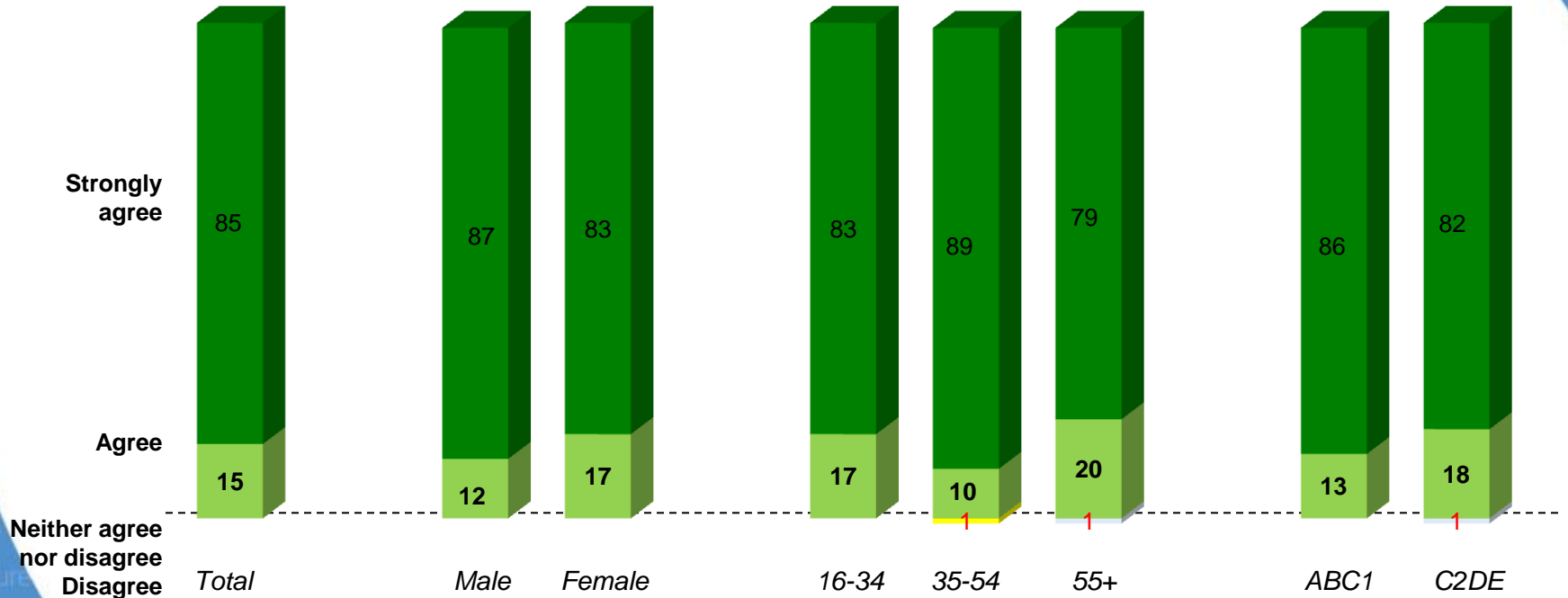


• Almost 9 in 10 (88%) visitors to the Belfast Tall Ships 2009 event stated that they would definitely or very likely recommend family and friends visit a similar event. Added to this were a further 9% indicating that they would be quite likely to recommend attending the event to others. In effect 97% visitors left the event as advocates.

• Females and those aged 16-34 were most likely to be the strongest advocates of the event.

# DO EVENTS LIKE TALL SHIPS ENCOURAGE PEOPLE TO COME TO BELFAST

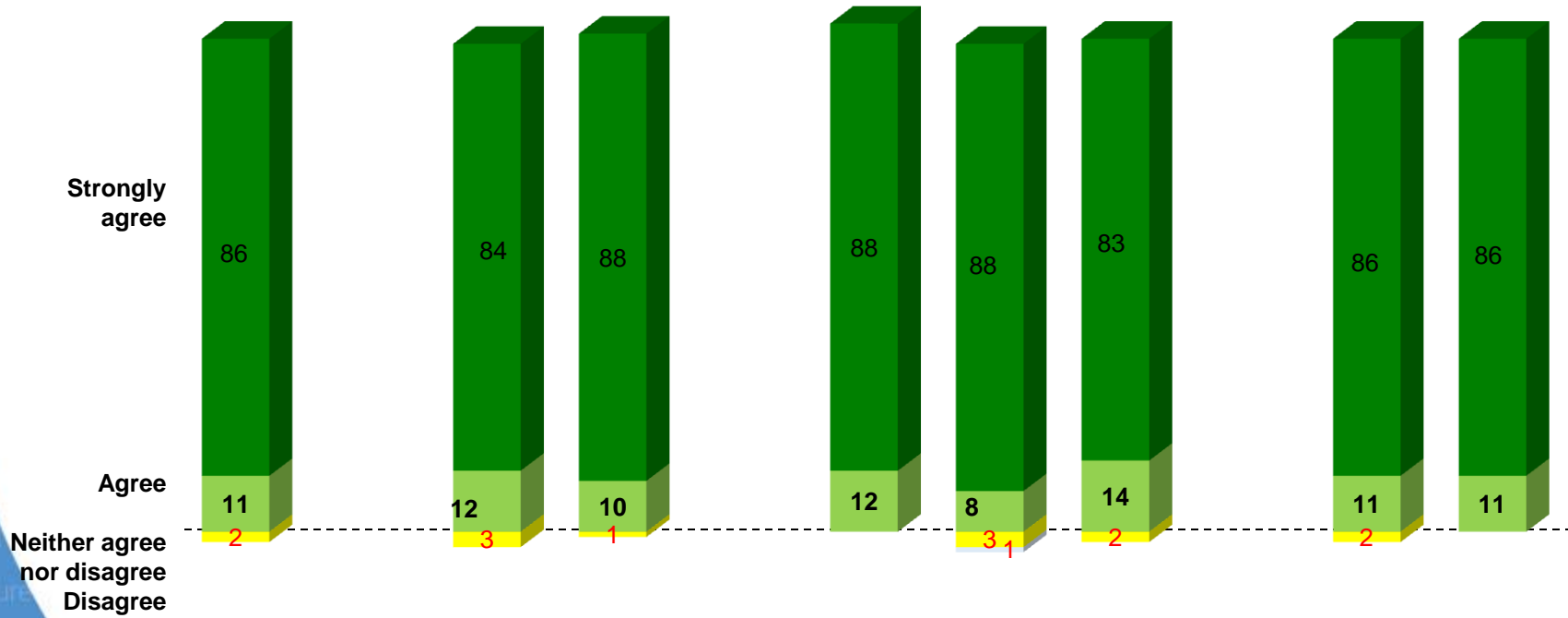
[ Base: All Respondents - 413 ]  
%



• Almost all (401/413) visitors to the Belfast Tall Ships 2009 event were of the opinion that events such as these encourage people to visit Belfast.

# AGREEMENT THAT THERE SHOULD BE MORE EVENTS LIKE TALL SHIPS IN BELFAST

[ Base: All Respondents - 413 ]  
%



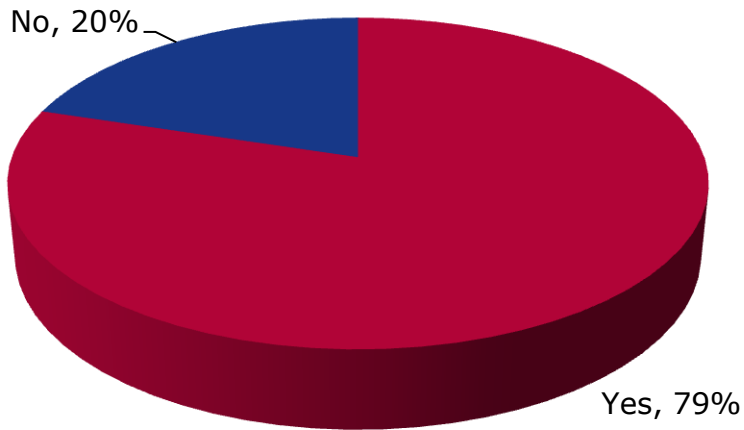
• There was almost universal agreement that there should be more events like the Tall Ships 2009 in Belfast, with 97% of respondents agreeing with this statement.



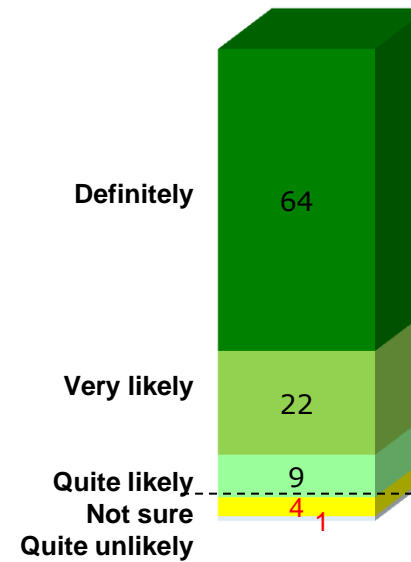
# AWARENESS & ATTITUDE TO PROPOSALS FOR A PURPOSE BUILT TITANIC ATTRACTION

[ Base: All Respondents – 413 ]

## AWARENESS



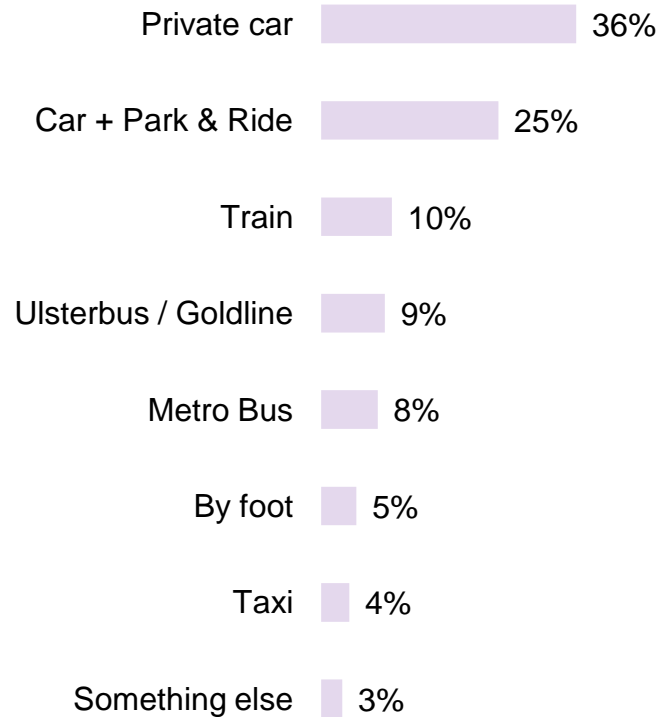
## LIKELIHOOD OF VISITING



- Almost four fifths (79%) of those attending the Belfast Tall Ships 2009 event expressed an awareness of the proposed Titanic attraction.
- 95% of attendees expressed some likelihood of visiting the said attraction.

# METHOD OF TRANSPORT

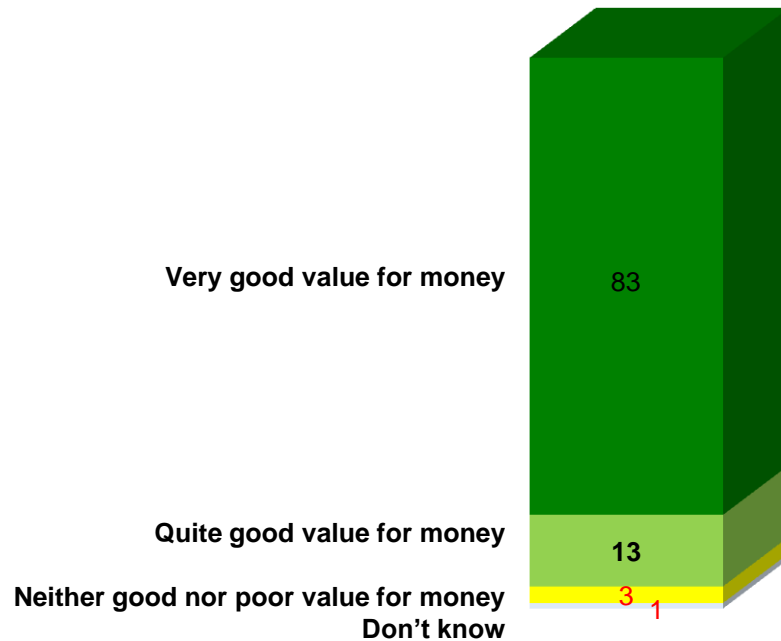
[ Base: All Respondents - 413 ]



- Private car was the most popular method of transport used to travel to the Belfast Tall Ship 2009 event; more than a third (36%) used their car for transport.
- Second most popular mode of transport was the park & ride facility (25%).

# PARK & RIDE VALUE FOR MONEY

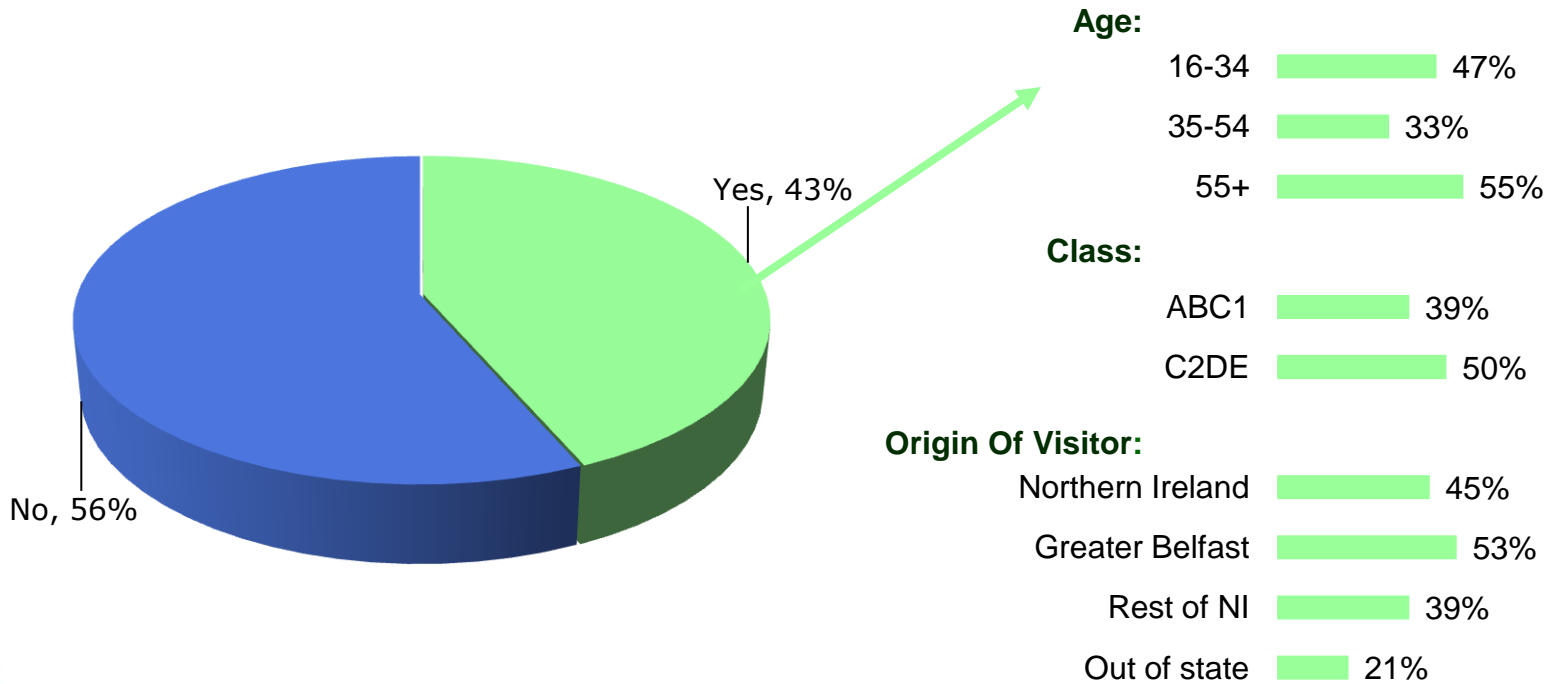
[ Base: All those who had used park & ride facility- 102 ]



- The vast majority (96%) of those who had used the park & ride facility stated that they felt it was good value for money.

# USED PUBLIC TRANSPORT LAST 3 MONTHS

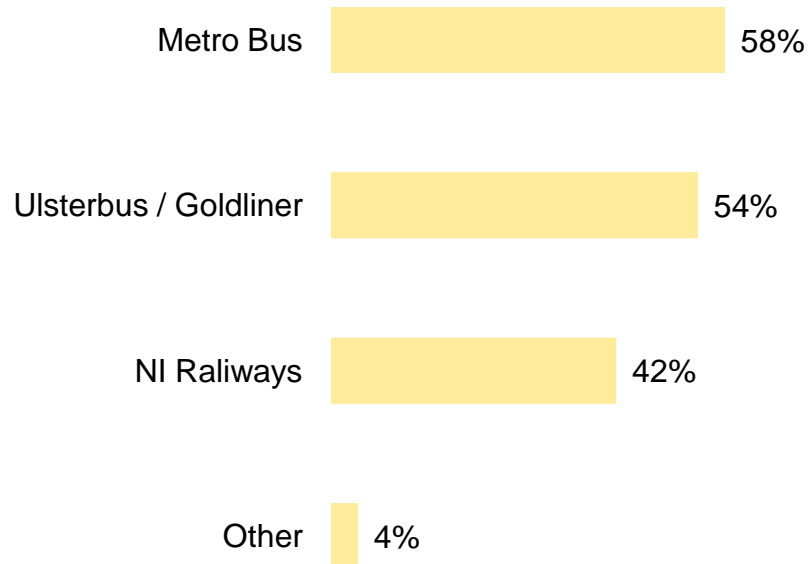
[ Base: All Respondents – 413 ]



- Over two fifths (43%) of attendees had used some form of public in the previous three months.
- Those aged 55+ and C2DE respondents were most likely to be users.

## TRANSPORT SERVICE USED LAST 3 MONTHS

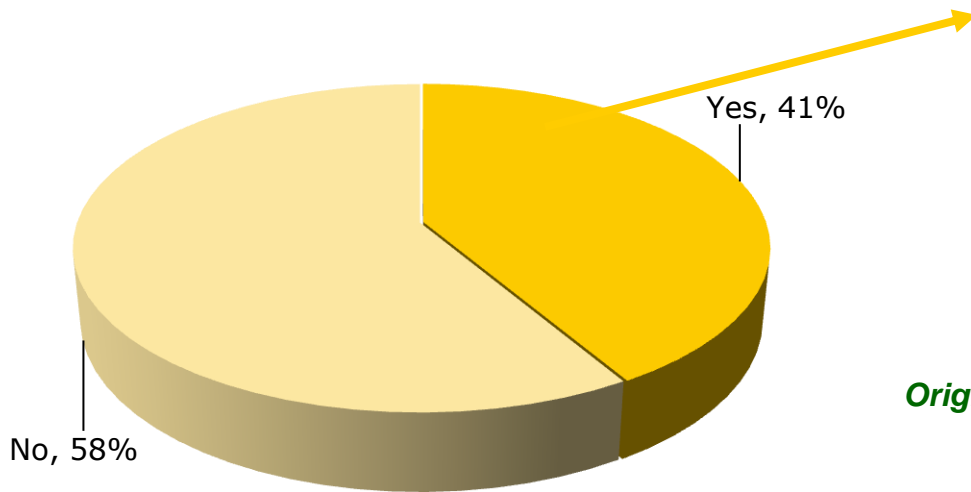
[ Base: All who had used public transport in the last three months – 179 ]



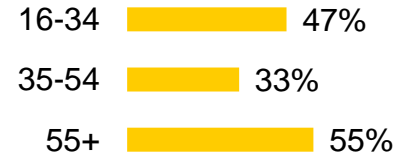
- Almost three fifths (58%) of those who had used public transport in the last 3 months had used a Metro Bus, whilst over half (54%) had used an Ulsterbus or Goldliner service.
- Around two fifths (42%) had used a NI Railways service.

# AWARENESS OF BELFAST 'B' BRANDING

[ Base: All Respondents - 413 ]



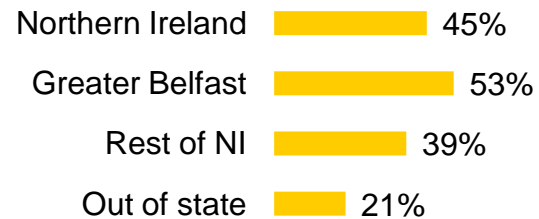
## Age:



## Class:



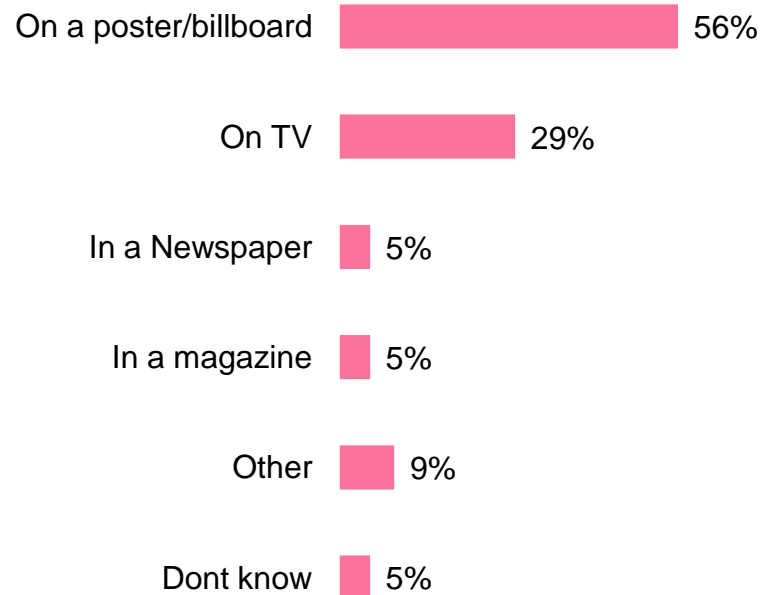
## Origin Of Visitor:



- Only two fifths (41%) of respondents were aware of the Belfast 'B' Branding.
- Those aged 55+ and those from Greater Belfast were more likely to be aware of the brand.

## WHERE SEEN BELFAST 'B' BRANDING

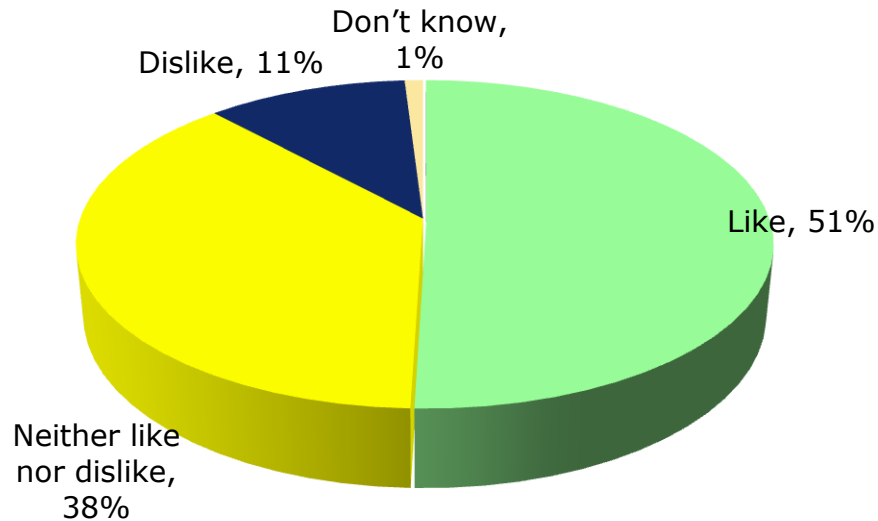
[ Base: All aware of 'B' branding – 169 ]



- The majority of those respondents who were aware of the 'B' brand saw it on a poster or billboard (56%), whilst almost 3 in 10 (29%) saw it on TV.

## IMPRESSION OF 'B' BRANDING

[ Base: All aware of 'B' branding – 169 ]



- Around half (51%) of those respondents (who aware of the new brand) stated that they like the 'B' branding .
- Over a third were 'on the fence' stating that they neither liked nor disliked the brand (38%).
- 1% preferred not to give an opinion answering 'don't know' – whilst 1 in 10 (11%) stated a dislike for the B Brand.



# VISITOR NUMBERS & AVERAGE SPEND IN BELFAST

	Total	Belfast	Rest of NI	Out of State
<b>Estimated Attendees</b>	<b>500,000</b>	<b>203,390</b>	<b>256,659</b>	<b>39,952</b>
<b>Spend per person</b>				
Accommodation		£0.00	£0.00	15.81
Eating out		£5.31	£6.49	£18.36
Shopping		£2.55	£4.00	£14.30
Entertainment		£2.31	£1.54	£5.34
Transport		£1.70	£1.88	£4.73
<b>Total</b>		<b>£11.87</b>	<b>£13.92</b>	<b>£58.54</b>

- Belfast City Council estimates that there were a total of 500,000 visitors to the Belfast Tall Ships 2009 event.
- Those surveyed were asked to estimate what they and their party would spend on that day in 5 categories as illustrated above.
- These expenditures have been averaged and adjusted to reflect an average spend per person.

## TOTAL ESTIMATED SPEND IN BELFAST ASSOCIATED WITH BELFAST EVENT

	Total	Belfast	Rest of NI	Out of State
<b>Estimated Attendees</b>	<b>500,000</b>	<b>203,390</b>	<b>256,659</b>	<b>39,952</b>
<b>Total Estimated Spend</b>				
Accommodation	£631,438	£0.00	£0.00	£631,438
Eating out	£3,479,895	£1,079,514	£1,666,934	£733,447
Shopping	£2,117,042	£518,425	£1,027,144	£571,473
Entertainment	£1,078,869	£470,384	£395,341	£213,144
Transport	£1,017,853	£345,928	£482,757	£189,169
<b>Total Direct Spend</b>	<b>£8,325,098</b>	<b>£2,414,251</b>	<b>£3,572,176</b>	<b>£2,338,671</b>

- Using these averages of spend per person within each market sector we can calculate that the total direct spend associated with the Belfast Tall Ships 2009 event was over £8.3million. .

## ESTIMATED ADDITIONALITY SPEND IN BELFAST ASSOCIATED WITH BELFAST EVENT

	Total	Belfast	Rest of NI	Out of State
<b>Estimated Attendees</b>	<b>422,518</b>	<b>161,017</b>	<b>228,814</b>	<b>32,688</b>
<b>Total Estimated Spend</b>				
Accommodation	£1,611,780	£0.00	£0.00	£1,611,780
Eating out	£3,008,770	£856,472	£1,603,980	£548,318
Shopping	£1,741,651	£411,967	£960,383	£369,301
Entertainment	£909,999	£395,372	£390,693	£123,935
Transport	£804,802	£220,596	£447,862	£136,345
<b>Net Additional Expenditure</b>	<b>£8,077,002</b>	<b>£1,884,406</b>	<b>£3,402,917</b>	<b>£2,789,678</b>
Indirect & Induced Expenditure (0.8 multiplier)	£6,461,602			
<b>Total Estimated Economic Impact</b>	<b>£14,538,603</b>			

- In order to estimate the element of additionality derived from staging the event, it is necessary to adjust the base to include only those that would not otherwise have visited Belfast, that is to say if the event had not been staged they would have either stayed at home or gone somewhere else in Northern Ireland. This brings the estimated number of attendees down to 422,518.
- Taking into account the average spend per person of these visitors who would otherwise not have visited Belfast, the net additional expenditure brought about by the event is estimated to have been over £8 million.
- Finally applying a multiplier effect of 0.8 to the net additional expenditure we can estimate the indirect and induced expenditure, that is taking into account the goods and services purchased by those supplying services to those attending the event and in turn the goods and services purchased by those in the employment of those benefiting from direct and indirect expenditure. Taking all this into account the total estimated economic impact to Belfast of this event was over £14.5 million.

## ADDITIONAL (OUT OF STATE) SPEND OUTSIDE BELFAST

	Out of state Spend in Belfast (Additionality)	Out of state Spend Outside Belfast - where Tall Ships was main reason for visit	Total out of state additional Spend in NI
<b>Estimated Attendees</b>	<b>32,688</b>	<b>33,898</b>	<b>32,688</b>
<b>Total Estimated Spend</b>			
Accommodation	£1,611,780	£25,943	£1,637,722
Eating out	£548,318	£94,304	£642,622
Shopping	£369,301	£62,954	£432,255
Entertainment	£123,935	£50,975	£174,910
Transport	£136,345	£63,923	£200,267
<b>Net Additional Expenditure</b>	<b>£2,789,678</b>	<b>£298,098</b>	<b>£3,087,776</b>
Indirect & Induced Expenditure (0.8 multiplier)	£2,231,743	£238,478	£2,470,221
<b>Total Estimated Economic Impact</b>	<b>£5,021,421</b>	<b>£536,576</b>	<b>£5,557,996</b>

• All out of state respondents who's main reason for visiting Northern Ireland was to visit the Belfast Tall Ships 2009 event were asked what they spent outside Belfast. These expenditures have been averaged and adjusted to reflect an average spend per person and grossed up to the relevant proportion of out of state visitors. Using these averages of spend per person within each market sector and applying a multiplier to account for indirect and induced spend we can calculate that the total economic impact of the Belfast Tall Ships 2009 event **out side Belfast** was more than £500,000. Therefore the total out of state additional contribution to Northern Ireland was in excess of £5 million, and the total economic impact of the Belfast centric element of the Tall Ships event is estimated to be in excess of **£15 million**.