



<b>Report to:</b>	Development Committee
<b>Subject:</b>	Belfast Tourism Monitor
<b>Date:</b>	21 August 2012
<b>Reporting Officer:</b>	John McGrillen, Director of Development, ext 3470
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<b>1</b>	<b>Relevant Background Information</b>
1.1	Members will be aware that the Belfast Tourism Monitor is an integrated monitoring and evaluation project carried out by Millward Brown Ulster, aimed at measuring the volume and value of tourism in Belfast on an annual basis. The importance of the data collated through the Tourism Monitor cannot be underestimated in terms of highlighting the economic impact and importance of tourism to the City's economy.
1.2	The Northern Ireland Tourist Board has recently released the findings of the Northern Ireland Visitor Attitude Survey 2011.
1.3	The data collected from the Belfast Tourism Monitor and the Northern Ireland Visitor Attitude Survey informs the future development of tourism for the city by providing primary research for Belfast Visitor and Convention Bureau, the Council and the wider tourism industry. The Tourism Monitor research is made available to the tourism industry through the Council's website.
1.4	Copies of the both full reports are available on request.

<b>2</b>	<b>Key Issues</b>		
	<u>Belfast Tourism Monitor</u>		
2.1	The Belfast Tourism Monitor for 2011 has been completed. The report highlights the following top-line facts and figures;		
2.2		2011	2010
	Total Number of Visitor Trips	7.86 million	8.04 million
	Total Overall Expenditure	£401 million	£398 million
	Total Overnight Visitors	1.6 million	1.4 million
	Total Overnight Expenditure	£168 million	£162 million
	Number of out-of-state overnight visitors	1.33 million	1.38 million

	Out of state overnight expenditure	£128 million	£132 million
	Total day trippers	6.3 million	6.4 million
	Total day visitor expenditure	£233 million	£236 million
	Out of state day visitors	1.4 million	1.7 million
	Out of state day visitor expenditure	£216 million	£113 million
2.3	It is estimated that the overall impact of direct and indirect tourism expenditure on the Belfast economy is almost £506 million with a total of 9,032 full-time equivalent jobs being supported by the tourism industry.		
2.4	The Republic of Ireland (ROI) market continues to be the dominant market in Belfast tourism (82% of all out of state trips). Great Britain (GB) accounts for a further 15%, leaving 3% of overnight visitors to the City having come from outside the British Isles. Furthermore the ROI market accounted for 97% of all day trips.		
2.5	Four fifths of out of state overnight visitors to Belfast City (1.07 million) stayed in commercial accommodation (hotels; guest houses; B&B's; youth hostels; self catering accommodation), staying for an average of 2.08 nights in the City. The remaining fifth (20%) of overnight visitors stayed with family and friends, for an average of 4.62 nights		
2.6	The majority of day trips to Belfast are accounted for by the local market, those living elsewhere in Northern Ireland. In 2011 there were an estimated 4.85 million day trips to Belfast made by Northern Ireland residents.		
2.7	1.33 million out of state overnight tourists visited Belfast and spent one or more nights in the City. Of this number 529,000 were business visitors (including 95,000 conference delegates).		
2.8	Day trippers spent a total of £233 million in Belfast City, £145.3 million of which was accounted for by indigenous visitors. The contribution of out of state day trippers was £87.9m.		
2.9	<p><u>Northern Ireland Visitor Attitude Survey 2011</u></p> <p>The Northern Ireland Tourist Board (NITB) has undertaken research on visitor attitudes within the Greater Belfast Area, which includes Belfast, Castlereagh, North Down, Newtownabbey and Carrickfergus Councils. It should be noted that it does not always reflect the specific strengths and weaknesses of Belfast, nevertheless it is a useful tourism barometer. The report highlights the following;</p>		
2.10	Greater Belfast appeals to younger visitors with around two in five aged under 35 years. Half visited attractions relating to the Titanic and Greater Belfast maritime history and one in five undertook a tour related to the Titanic and /or the Greater Belfast maritime story.		
2.11	Visiting a castle/house or visiting pubs are some of the key activities undertaken. Hotels are the most popular type of accommodation and cafes and pubs are the most popular place to eat, with one in five visiting the city's museums and art galleries.		
2.12	Sightseeing and relaxing were chosen by visitors as the two main reasons for visiting NI.		

2.13	The average spend per person, per visit was £88 across all leisure visitors, ranging from £30 amongst day visitors to £154 amongst visitors who stayed overnight.
2.14	Visitors from Northern Ireland (NI) ROI, North America and the Rest of the World had the highest recommendation levels with around 3 in 4 saying they would definitely recommend visiting to their friends and relatives, whereas visitors from Europe are least likely to recommend the area
2.15	Aspects of the visitor experience survey most likely to receive a “very satisfied” rating include transport connections to and from air and sea ports and the choice of accommodation and high standard of staff in accommodation.
2.16	Visitors provide more negative ratings for the range of things to do on a Sunday and in the evening, the range of outdoor activities to do and the information available and value for money about places to eat out.
2.17	As with NI wide city destinations, being seen as “somewhere you feel safe” was identified as a main driver of low satisfaction.
2.18	Key strengths are transport connections, the choice and customer service in accommodation within the city and as somewhere with a friendly, genuine welcome. The Titanic and its maritime attractions are also a major draw.
2.19	Interest in recent politics is also high (second only to Derry/Londonderry) to a large share of visitors when planning their trip.

<b>3</b>	<b>Equality and Good Relations Considerations</b>
	There are no Equality and Good Relations Considerations attached to this report.

<b>4</b>	<b>Recommendations</b>
	Members are asked to note the findings

<b>5</b>	<b>Decision Tracking</b>
	An interim report on 2012 figures will be brought back to Development Committee in December 2012.
	Time frame: December 2012 <span style="float: right;">Reporting Officer Shirley McCay</span>

<b>6</b>	<b>Key to Abbreviations</b>
	NITB - Northern Ireland Tourist Board NI - Northern Ireland ROI - Republic of Ireland GB - Great Britain