



Report to: Development Committee

Subject: Belfast Tourism Monitor

Date: 20 June 2013

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1	Relevant Background Information
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 data collected from the Belfast Tourism Monitor informs the future development of tourism for the city by providing primary research for Belfast Visitor and Convention Bureau (BVCB), the Council and the wider tourism industry. The Tourism Monitor research is made available to the tourism industry through the Council's website.
1.3	Copies of the Belfast Tourism Monitor 2012 are available on request.

2	Key Issues																											
2.1	<p><u>Belfast Tourism Monitor</u></p> <p>The Belfast Tourism Monitor for 2012 has been completed. The report highlights the following top-line facts and figures;</p> <table><tr><td></td><td>2012</td><td>2011</td></tr><tr><td>Total Number of Visitor Trips</td><td>7.59 million</td><td>7.86 million</td></tr><tr><td>Total Overall Expenditure</td><td>£416.5 million</td><td>£401 million</td></tr><tr><td>Total Overnight Visitors</td><td>2.23 million</td><td>1.6 million</td></tr><tr><td>Total Overnight Expenditure</td><td>£226.25 million</td><td>£168 million</td></tr><tr><td>Number of out-of-state overnight visitors</td><td>1.75 million</td><td>1.33 million</td></tr><tr><td>Out of state overnight expenditure</td><td>£201.13 million</td><td>£128 million</td></tr><tr><td>Total day trippers</td><td>5.36 million</td><td>6.3 million</td></tr><tr><td>Total day visitor expenditure</td><td>£190 million</td><td>£233 million</td></tr></table>		2012	2011	Total Number of Visitor Trips	7.59 million	7.86 million	Total Overall Expenditure	£416.5 million	£401 million	Total Overnight Visitors	2.23 million	1.6 million	Total Overnight Expenditure	£226.25 million	£168 million	Number of out-of-state overnight visitors	1.75 million	1.33 million	Out of state overnight expenditure	£201.13 million	£128 million	Total day trippers	5.36 million	6.3 million	Total day visitor expenditure	£190 million	£233 million
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2.2	Out of state day visitors Out of state day visitor expenditure	1.2 million £61 million	1.4 million £87.9 million
2.3	It is estimated that the overall impact of direct and indirect tourism expenditure on the Belfast economy is almost £524 million (£506m in 2011) with a total of 9,370 (9,032 in 2011) 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 (73% of all out of state trips). Great Britain (GB) accounts for a further 22%, leaving 5% of overnight visitors to the City having come from outside the British Isles. Furthermore the ROI market accounted for 94% of all day trips.		
2.5	Two thirds of out of state overnight visitors to Belfast City (1.17 million) stayed in commercial accommodation (hotels; guest houses; B&B's; youth hostels; self catering accommodation), staying for an average of 1.76 nights in the City. The remaining third (33%) of overnight visitors stayed with family and friends, for an average of 2.96 nights		
2.6	The majority of day trips to Belfast are accounted for by the local market, those living elsewhere in Northern Ireland. In 2012 there were an estimated 4.19 million day trips to Belfast made by Northern Ireland residents.		
2.7	1.75 million out of state overnight tourists visited Belfast and spent one or more nights in the City. Of this number 583,000 were business visitors (including 88,000 conference delegates).		
	Day trippers spent a total of £190.2 million in Belfast City, £129.7 million of which was accounted for by indigenous visitors. The contribution of out of state day trippers was £61.02m.		

3	Equality and Good Relations Considerations
3.1	There are no Equality and Good Relations Considerations attached to this report.

4	Recommendations
4.1	Members are asked to note the findings of this report.

5	Decision Tracking
An interim report on 2013 figures will be brought back to Development Committee in December 2013.	
Time frame: December 2013	
Reporting Officer Shirley McCay	

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