Impact of Tourism to Belfast
4th Global Summit on City Tourism
Tourism Function

- Product Development
- Monitoring & Research
- Marketing & Promotion
- Visitor Servicing
The Visit Belfast Tourism Model

Private Sector

Central Government
Tourism NI
Invest NI

Visit Belfast

Local Authorities
Belfast City Council
Lisburn City & Castlereagh District
North Down & Ards DC

500+ tourism businesses
Rise of City Tourism

Visit Belfast

bringing the world to Belfast
**Rise of City Tourism: Decade of Growth**

<table>
<thead>
<tr>
<th>Category</th>
<th>Minimum Value</th>
<th>Maximum Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>1.5m</td>
<td>6.9m</td>
</tr>
<tr>
<td>Out-of-State Visitors</td>
<td>721k</td>
<td>1.6m</td>
</tr>
<tr>
<td>Belfast Hotel Rooms</td>
<td>1,132</td>
<td>3,600</td>
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<tr>
<td>Tourism Spend</td>
<td>£114m</td>
<td>£465m</td>
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<tr>
<td>Cruise Ships</td>
<td>2</td>
<td>82</td>
</tr>
<tr>
<td>Bednights</td>
<td>1.4m</td>
<td>4m</td>
</tr>
</tbody>
</table>
Belfast Hotel Demand: Record Highs

2015 YTD: 80.8% room occupancy
89.8% w/end
84.6% w/day
UK Key Markets Occ, ADR % Change

Aug 2015 YTD in GBP
What’s driving tourism growth?

free independent travel
recovering conference & meetings market
improved access
political stability
world-class, competitive tourism offering
concerted destination marketing
Belfast’s contribution NI Programme for Government

Belfast: driving the visitor economy

- 84% of Belfast spend by visitors from outside NI
- 89% of bed nights in Belfast generated by out-of-state visitors
- 36% of trips to NI by out of state visitors generated by Belfast
- 40% of spend in NI by out of state visitors generated by Belfast
- 40% of NI hotel accommodation is located in Belfast

Regional benefit of Belfast growth

- 21% of out of state visitors to Belfast visit other areas of Belfast
- 32% of enquiries handled by Visit Belfast Welcome Centre for other areas in NI
- 55% of cruise visitors arriving into Belfast visit attractions across NI
Outcomes Based Accountability

City Outcome
...world-class, must visit, city destination
...a leading medium-sized city destination for leisure & business tourism in Europe

City Indicator
100% growth in tourism revenue by 2020

Visit Belfast Performance Measures
1.7m bednights
2m enquiries
£370m tourism revenue
27:1 return on investment
The Goal

1999

100% growth by 2020
Leisure Tourism


Combined reach: 75m potential visitors

Campaign leverage £1:£2.85 / Ave RoI: £1:£78

Cruise tourism: Over 80 ships  over 140,000 visitors

1.7m web visits

Driving overnights

200,000 bednights

£20m economic benefit
Business Tourism

195% growth in conference business

£300m of conference business in pipeline

£34m conference wins 2015/16 YTD

6 priority sectors (Invest NI)

2015 conferences inc. Rotary GB & Ireland, Radiology International, MoneyConf & EnterConf

250% growth by 2020

Top 5 UK conference destination

Top 100 international conference destination
Managing the Visitor Experience

585,000 enquiries
£12m economic benefit

Key gateway information service

31% of VB enquiries are gateway enquiries

65% of visitors were more likely to visit places they hadn’t thought of before

69% of cruise passengers are 1^{st} time visitors

77% of cruise visitors likely to return on a holiday
Visit Belfast Outputs

£85m in tourism revenue

£1:£2.85 campaign leverage

£1:£78 RoI
The way forward

- City Breaks
- Cruise Tourism
- Conference & Meetings
- Events

fastest growing tourism sectors in the world
The Potential

Invest in:
- marketing
- events
- access
- product
How the world sees Belfast

“...a capital that is redefining itself in the eyes of the world.”

National Geographic Traveller

“I’ve always been very fond of Northern Ireland and have found the people there as friendly as any I’ve met.”

Chief editor of Le Guide du Rotard, Pierre Josse

“Get here early and enjoy it before the rest of the world arrives.”

Lonely Planet