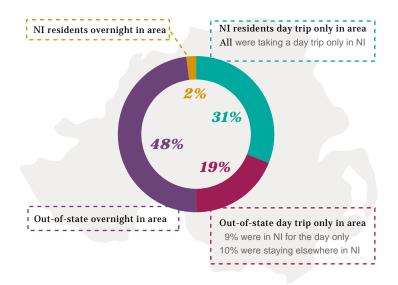
The Greater Belfast Destination attracts the largest proportion of out-of-state leisure visitors staying in the region. Visiting a specific attraction and exploring somewhere new were key reasons to visit this memorable destination

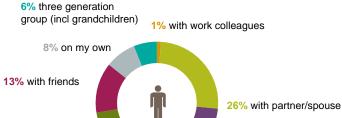
LEISURE VISITORS





PARTY TYPE

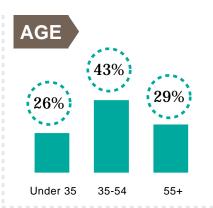
Party size of 3.59 is close to the average party size across all 9 destinations



(incl friends and family group)

32% with own family





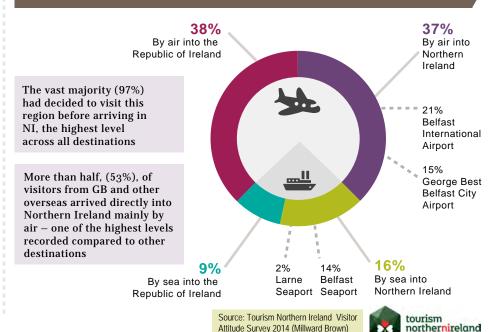
Greater Belfast attracted a wide range of party types and unlike other regions no one party type strongly dominated

13% wider family

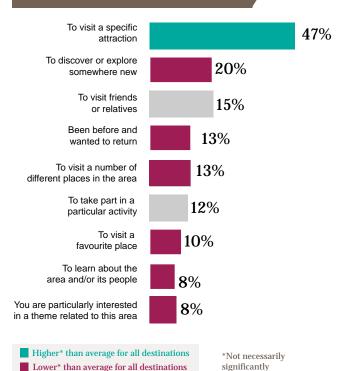
The likelihood of visitors overall to this destination having children in their party was close to the average for all regions (41%). Having lots for children to do was a strong motivation amongst NI and ROI residents but was much less so for those visiting from GB and other overseas

Overnight visitors stayed for **4.73 nights** on average.

MEANS OF TRANSPORT INTO ISLAND OF IRELAND



KEY REASONS TO VISIT



the destination because of a specific attraction. This destination also has an appeal for those wanting to discover or explore something new

Almost half of visitors to Greater Belfast were attracted to



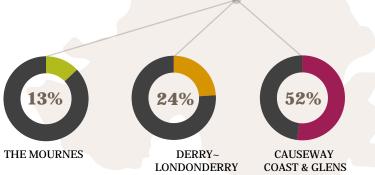
of all visitors chose this destination specifically to visit to find out stories, history and legends of Northern Ireland. This is reflected in that the key segment from GB and other overseas (based on their motivation for visiting NI) was Culturally Curious

OTHER KEY DESTINATIONS ALSO VISITED

higher or lower



Equal to average for all destinations



59% of visitors from GB and other overseas (one of the lowest levels for all regions) also visited the Republic of Ireland on the same trip, although they were more likely than most to also visit Dublin and Galway (the highest level for all areas)

ARRIVAL AND GETTING AROUND

Greater Belfast has a strong sense of place and clear signage to let visitors know they have arrived at their destination. Compared to most others, this region is rated highly in terms of public transport, taxi service and the provision of signs that help visitors find interesting and key tourist locations. Notably ratings were higher across all factors for visitors from outside NI

3.84	Signs that help you to find interesting/key tourist locations
3.66	Road signs that help you find your way around
3.7	Public transport availability, service and value for money
3.74	Taxi availability, service and value for money
3.59	Car touring routes which point out places along the way
3.82	A feeling of being welcomed when you arrive at destination
3.98	sense of the place you are visiting when you arrive at the destination
3.99	Clear signs to let you know you have arrived in destination

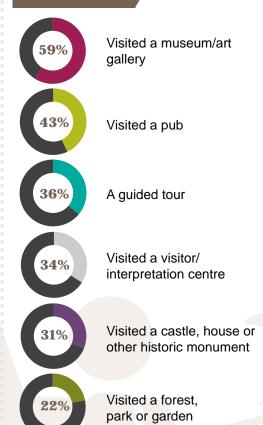


Α

POPULAR PLACES VISITED

*ALL **00S RESIDENTS 70% 42% **Titanic Belfast** 19% 33% City Hall 32% **Ulster Museum Ulster Folk & Transport** 31% 10% Museum 12% **Crumlin Road Gaol**

ACTIVITIES



Hiking or Walking

RATING OF OFFERING

Score higher* than average of all destinations

4.19		Information at visitor attractions in your own language
4.16		Staff on tours and in attractions tell stories about local history and places of interest
4.13		Information to tell you about the places you visit
4.11		Information at visitor attractions which tells the story of the place you are visiting
4.06		The places you visited had a positive buzz about them
4.01		A range of interesting/enjoyable visitor attractions
3.96		A range of activities suitable for families
3.85		Unique things to do and see that reflect the destination's own local culture
3.7		Cities, towns and villages that give the destination its own distinctive sense of place
3.61		Value for money of attractions (historic sites, museums, visitor centres, etc.)
3.58		Opportunities to attend local events/festivals
3.5		A range of outdoor activities to do
3.47		Range of things to do in the evenings
	_	

*Not necessarily

significantly

higher

Range of things to do on Sundays

Attitude Survey 2014 (Millward Brown)

3.2

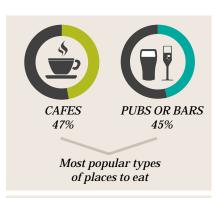
Compared to other destinations, visitors to this region were much more likely to visit a museum or art gallery. Visiting a pub or a visitor centre or partaking in a guided tour also feature strongly. As expected many of the key tourist locations including Titanic Belfast and City Hall were highly attractive to those visiting from out-of-state. The offering in Greater Belfast scored higher than average across most aspects of delivery

^{*}Based on all visitors to the region

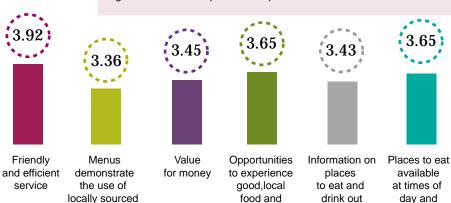
^{**}OOS refers to visitors from outside of NI

ingredients

PLACES TO EAT



As a rule NI in general is not particularly well rated across most aspects of the eating out experience Mean scores
5=Excellent
Ratings were mixed, generally close to average, but performing relatively well in terms of availability of places to eat at suitable times of day and night and information provided on places to eat and drink out



drink

5=Excellent

VISITOR INFORMATION

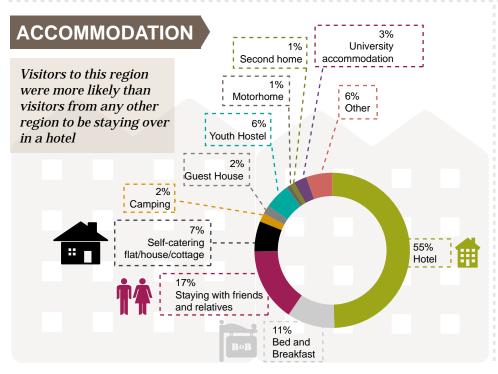
Visitor Information Centres were rated very highly across Northern Ireland for all measures. The only related metric in the Greater Belfast Visitor Information Centres to score below 4 was suitable opening times

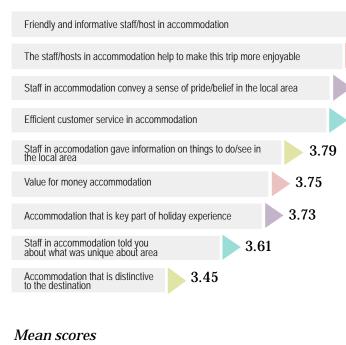
4.07

3.97

3.93

3.92





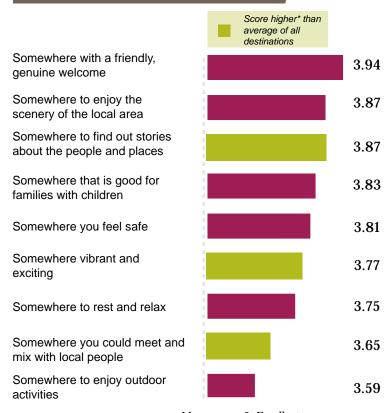
night that suit you

In general this region performed close to or below average in terms of aspects of the accommodation offering. Visitors did not view the accommodation offering as being particularly distinctive. Areas to focus on include encouraging staff to provide information on things to see and do and things that are unique to the area

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)



DESTINATION EXPERIENCE



*Not necessarily significantly higher

Mean scores 5=Excellent

VISITORS THOUGHT THERE WOULD BE ENOUGH TO DO IN THIS DESTINATION FOR:



DESTINATION RATINGS

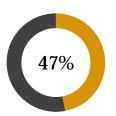
Overall leisure visitors had a good time in this region and as such the majority are highly likely to recommend the region to others. Around two thirds felt their experience in the region more than matched their expectations with the majority comparing it similarly or even more favourably than other destinations outside of NI for a holiday or short break



RATING OF TIME SPENT IN DESTINATION AS "EXCELLENT"

The Greater Belfast area was close to average in terms of overall rating with almost half saying it was 'excellent'. Out-of-state visitors and those staying overnight in the region rated Greater Belfast a little better than others





GREATER BELFAST IS "MUCH BETTER THAN EXPECTED"

Rating of this region in terms of matching expectations was very marginally above most others and was rated better by those staying over as well as those from out-of-state

47%	 MUCH BETTER THAN EXPECTED
17%	 A LITTLE BETTER THAN EXPECTED
32%	 SAME AS EXPECTED
2%	 A LITTLE WORSE THAN EXPECTED



"WOULD DEFINITELY RECOMMEND AREA TO FRIENDS AND FAMILY"

The proportion who would definitely recommend this area to others was close to average, with out-of-state visitors more likely to do so

70%	 DEFINITELY
20%	 PROBABLY
9%	 FAIRLY LIKELY
1%	 PROBABLY NOT
1%	 DON'T KNOW



"MUCH/ SLIGHTLY BETTER THAN OTHER REGIONS OUTSIDE OF NI FOR HOLIDAY"

DON'T KNOW

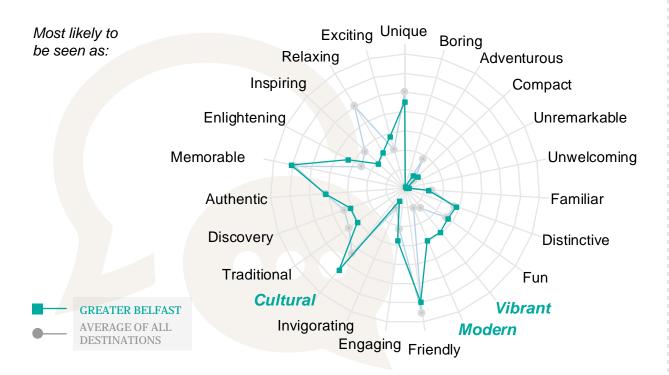
The Greater Belfast area was one of the regions most likely to be favourably compared to other destinations outside of NI, more so by those from out-of-state

16%	 MUCH BETTER
24%	 SLIGHTLY BETTER
39%	 THE SAME
10%	 SLIGHTLY WORSE
1%	 MUCH WORSE
10%	 DON'T KNOW

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)



WORDS CHOSEN TO DESCRIBE DESTINATION



Of all the destinations, Greater Belfast was most likely to be described as Modern (29%) and Vibrant (29%), and more likely than most other regions to be seen as Memorable (60%), Cultural (54%), Distinctive (28%), Exciting (28%) and Engaging (27%)

Visitors to this region were close to average in terms of likelihood of having shared their experiences using social media. They were more likely than most to either upload their photos onto the internet or update their Facebook status about their trip.



Uploaded trip photos



Left online reviews

MEMORABLE EXPERIENCES



'All the staff we met at the City Hall were friendly, welcoming and informative. The building is beautiful and we were encouraged to interact by e.g. trying on councilors' robes and sitting in their seats. The friendliness was special compared with some other cities.'

'Wandering the city streets, with a change of pace from the rest of the trip. Lively engaging and buzzing. Stopping off for a coffee. Discovering something new down a random side street.'

'...Folk and
Transport
Museum - felt
part of the
place...enjoyed
exploring and
taking part in the
events on offer.'



'Bangor Marina, great staff very welcoming...beautiful playpark close to marina, many games of crazy golf, and again fantastic walking for all of us and four legged friends...'



'Spending the morning at St George's Market with my friend and her dad, eating an ulster fry...'

"...Titanic Belfast...I found the whole exhibition fascinating and extremely moving..."



'Visiting and soaking in the vibrancy of the Victoria street shopping area.'

Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

'Orienteering up

Belfast, great fun

and challenging."

the Cavehill in



Higher than average of all

Lower than average of all

DESTINATION GREATER BELFAST

Visitor Information Centre - Friendliness and efficiency of service 4.33 4.49 Visitor Information Centre - Availability of useful information 4.27 4.22 Visitor Information Centre - Staff convey a sense of pride / belief in their local area 4.13 4.4 Visitor Information Centre - Staff provided ideas about things to see and do 4.14 4.38 Somewhere to enjoy the scenery of the local area 3.87 4.22 Visitor Information Centre - Staff provided ideas about things to see and do 4.16 Friendly and information centre - Stutiable opening times 3.95 4.16 Friendly and informative staff (accommodation) 4.07 4.14 Information at visitor attractions in your own language 4.19 4.11 Transport connections to and from the air or sea port (e.g. buses/car hire/taxis) 4.12 4.09 The availability of useful information to help you to plan your trip 1814 it is somewhere you feel safe 3.81 4.07 Staff convey a sense of pride/belief in the local area (accommodation) 3.93 4.05 The staff / hosts help make this trip a more enjoyable experience (accommodation) 3.97 4.05 That it is somewhere finelefly, genuline, welcome 3.94 4.04 Staff on tours and in attractions tell stories about the local history and places of interest 4.16 4.04 That it is somewhere to rest and relax 1.02 That it is somewhere to rest and relax 1.03 Fesse of finding suitable accommodation 4.1 4.02 That it is somewhere to rest and relax 1.05 Romewhere to relax of the place you sit information at visitor attractions which tells the story of the place you are visiting 4.11 4.13 4.02 The finding autiable accommodation 3.92 3.99 A sense of the place you are wisting when you arrive at your destination 3.92 3.99 A sense of the place you are wisting when you arrive at your destination 3.99 Feeling of being welcomed when you arrive in NI Efficient customer service in accommodation 3.99 Feeling of being welcomed when you arrive in in NI Somewhere to enjoy outdoor activities 3.99 Feeling of being welcomed when you arrive i	MEASURE	GREATER	AVERAGE FOR
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Staff on tours and in attractions tell stories about the local history and places of interest That it is somewhere that is good for families with children 3.83 4.03 Ease of finding suitable accommodation 4.1 4.02 That it is somewhere to rest and relax 3.75 4.02 Information to tell you about the places you visit 4.13 Information at visitor attractions which tells the story of the place you are visiting 4.11 Information at visitor attractions which tells the story of the place you are visiting 4.11 Sense of the place when you arrive in NI Efficient customer service in accommodation 3.92 3.99 A sense of the place you are visiting when you arrive at your destination 3.98 3.99 Feeling of being welcomed when you arrive in NI 4 3.97 Friendly and efficient service in places to eat out 3.92 3.96 Availability/ease of finding information about the different regions within NI 3.98 Somewhere to enjoy outdoor activities 3.59 3.95 The places you visit have a positive buzz about them 4.06 3.92 A feeling of being welcomed when you arrive in chosen destination 3.82 3.90 Range of interesting/enjoyable visitor attractions 4.01 3.91 A range of activities suitable for families	The staff / hosts help make this trip a more enjoyable experience (accommodation)	3.97	4.05
That it is somewhere that is good for families with children Ease of finding suitable accommodation 4.1 4.02 That it is somewhere to rest and relax 3.75 4.02 Information to tell you about the places you visit Information at visitor attractions which tells the story of the place you are visiting Sense of the place when you arrive in NI Efficient customer service in accommodation 3.92 3.99 A sense of the place you are visiting when you arrive at your destination Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI Somewhere to enjoy outdoor activities The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions A range of activities suitable for families	, · · · ·	3.94	4.04
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Information at visitor attractions which tells the story of the place you are visiting Sense of the place when you arrive in NI Efficient customer service in accommodation 3.92 3.99 A sense of the place you are visiting when you arrive at your destination 3.98 Sense of the place you are visiting when you arrive in NI Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI 3.98 Somewhere to enjoy outdoor activities 3.59 The places you visit have a positive buzz about them 4.06 3.92 A feeling of being welcomed when you arrive in chosen destination 3.82 3.99 A range of interesting/enjoyable visitor attractions 4.01 3.99 A range of activities suitable for families	That it is somewhere to rest and relax	3.75	4.02
Sense of the place when you arrive in NI Efficient customer service in accommodation A sense of the place you are visiting when you arrive at your destination Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI 3.98 3.96 Availability/ease of enjoy outdoor activities The places you visit have a positive buzz about them 4.06 3.92 A feeling of being welcomed when you arrive in chosen destination 3.82 3.99 3.96 3.97 3.98 3.99 3.99 4.01 3.98 3.99 3.95 3.95 3.95 3.96 3.90 A range of interesting/enjoyable visitor attractions 4.01 3.99 3.99 3.99 4.01 3.99	Information to tell you about the places you visit		4.01
Efficient customer service in accommodation A sense of the place you are visiting when you arrive at your destination Feeling of being welcomed when you arrive in NI Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI 3.98 3.95 Somewhere to enjoy outdoor activities The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions A range of activities suitable for families 3.99 3.99 3.99 3.99 4.01 3.99 3.99 3.96 3.99 3.99 3.99 3.99 3.99 3.90 3.91 3.92 4.01 3.99 3.99	Information at visitor attractions which tells the story of the place you are visiting		4
A sense of the place you are visiting when you arrive at your destination Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI Somewhere to enjoy outdoor activities The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination A range of interesting/enjoyable visitor attractions A range of activities suitable for families 3.98 3.97 3.96 3.98 3.95 3.95 3.95 4.06 3.92 3.99 4.06 3.92 3.99 3.99 3.90 3.90 3.90	Sense of the place when you arrive in NI	4.03	4
Feeling of being welcomed when you arrive in NI Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI 3.98 Somewhere to enjoy outdoor activities 3.59 The places you visit have a positive buzz about them 4.06 A feeling of being welcomed when you arrive in chosen destination 3.82 A range of interesting/enjoyable visitor attractions 4.01 3.99 A range of activities suitable for families 3.89	Efficient customer service in accommodation	3.92	3.99
Friendly and efficient service in places to eat out Availability/ease of finding information about the different regions within NI 3.98 3.95 Somewhere to enjoy outdoor activities 3.59 The places you visit have a positive buzz about them 4.06 3.92 A feeling of being welcomed when you arrive in chosen destination 3.82 A range of interesting/enjoyable visitor attractions 4.01 3.99 A range of activities suitable for families 3.99 3.90	A sense of the place you are visiting when you arrive at your destination	3.98	
Availability/ease of finding information about the different regions within NI Somewhere to enjoy outdoor activities The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions A range of activities suitable for families 3.98 3.95 3.95 3.92 3.92 3.90 3.90 3.90 3.90 3.90 3.90 3.90	Feeling of being welcomed when you arrive in NI		3.97
Somewhere to enjoy outdoor activities The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions A range of activities suitable for families 3.99 3.90 3.91 3.92 3.91 3.92 3.90 3.90 3.90 3.90	Friendly and efficient service in places to eat out	3.92	3.96
The places you visit have a positive buzz about them A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions A range of activities suitable for families 3.92 3.92 3.91 3.92 3.92 3.93 3.93 4.01 3.93 3.96 3.89	Availability/ease of finding information about the different regions within NI	3.98	3.95
A feeling of being welcomed when you arrive in chosen destination Range of interesting/enjoyable visitor attractions 4.01 3.9 A range of activities suitable for families 3.96 3.89	Somewhere to enjoy outdoor activities	3.59	3.95
Range of interesting/enjoyable visitor attractions 4.01 3.9 A range of activities suitable for families 3.96 3.89	The places you visit have a positive buzz about them	4.06	3.92
A range of activities suitable for families 3.96 3.89	A feeling of being welcomed when you arrive in chosen destination	3.82	3.9
	Range of interesting/enjoyable visitor attractions	4.01	3.9
Information on things to do / see in local area (accommodation) 3.79	A range of activities suitable for families	3.96	3.89
	Information on things to do / see in local area (accommodation)	3.79	3.89

The table above and on the next page provides a summary of all ratings used in the survey, presented in order according to the average rating given across all 9 destinations. Scores are based on the scale where 5=excellent, 4=very good, 3=good, 2=fair and 1=poor. Differences between scores for the destination and the average of all 9 destinations are not necessarily significant



Higher than average of all

Lower than average of all

DESTINATION	GREATER BELFAST	

MEAGUDE	GREATER	AVERAGE FOR
MEASURE	BELFAST	ALL DESTINATIONS
Clear signs to let you know when you have arrived in your destination	3.99	3.88
Accommodation that is a key part of the holiday experience itself	3.73	3.88
Value for money of accommodation	3.75	3.82
Signs that help you find interesting /key tourist locations	3.84	3.8
The availability of tourist information at the air or sea port you arrive at (Excludes NI & ROI residents)	3.89	3.78
Staff tell you about what is unique about the local area (accommodation)	3.61	3.75
That you are able to find out about the stories of the people and place you are visiting	3.87	3.74
A range of outdoor activities to do	3.5	3.73
Unique things to do and see that reflect the destination's own local culture	3.85	3.72
Accommodation that is distinctive to the destination	3.45	3.71
Clear signs to let you know when you have arrived in NI	3.97	3.71
Road signs that help you to find your way around	3.66	3.69
Cities, towns and villages that give the destination its own distinctive sense of place	3.7	3.69
Opportunities to experience good local food and drink	3.65	3.64
That you are able to meet and mix with local people	3.65	3.61
Car touring routes which point out places to visit along the way	3.59	3.61
Taxi availability service and value for money	3.74	3.61
That it is somewhere vibrant and exciting	3.77	3.61
Places to eat available at the times of day and night that suit you	3.65	3.59
Value for money of attractions (historic sites/museums/visitor centres)	3.61	3.58
Opportunities to attend local events/ festivals	3.58	3.55
Public transport availability service and value for money	3.7	3.54
Value for money of places to eat out	3.45	3.51
Menus demonstrate the use of locally sourced ingredients	3.36	3.45
Information on places to eat and drink out	3.43	3.33
Range of things to do in the evenings	3.47	3.16
Range of things to do on Sundays	3.2	3.14

Further information is available on www.tourismni.com

For a full report and to access Tourism NI's fact cards for the other key tourism destinations click the arrow

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For Tourism NI's fact cards on the value and volume of tourism in each of the 9 key tourism destinations and 11 council areas (based on data released by NISRA) click the arrow





tourism

northernireland

