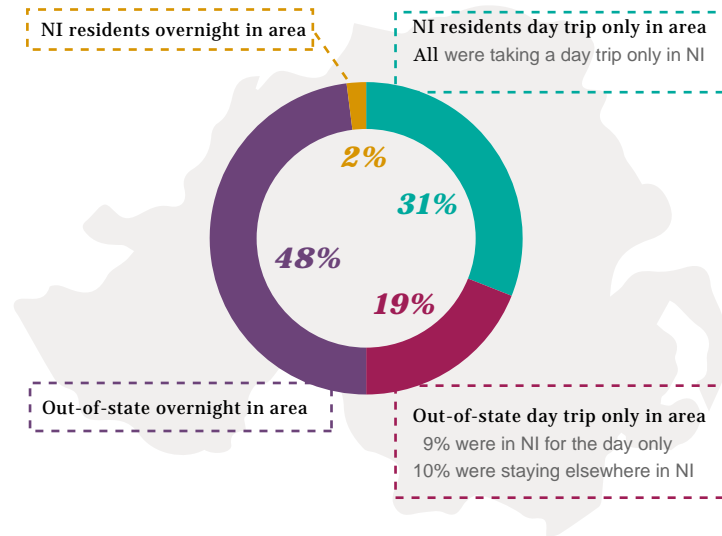


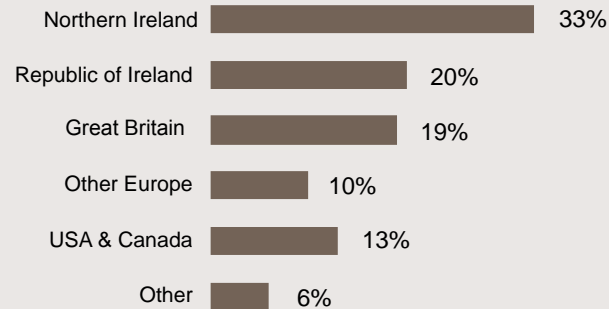
DESTINATION GREATER BELFAST

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

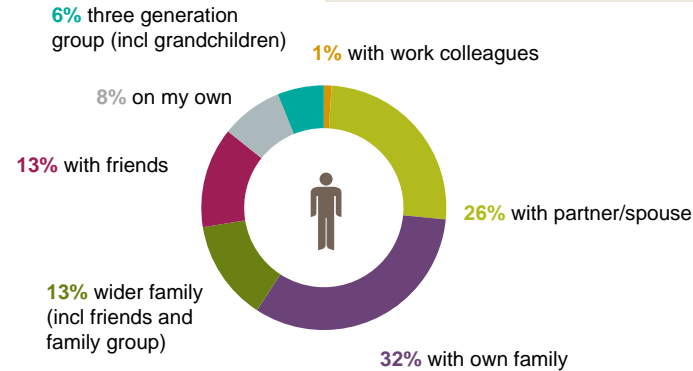


ORIGIN OF THOSE VISITING DESTINATION



PARTY TYPE

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



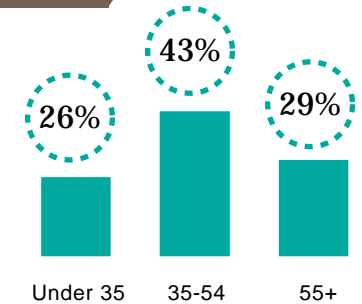
Greater Belfast attracted a wide range of party types and unlike other regions no one party type strongly dominated

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.



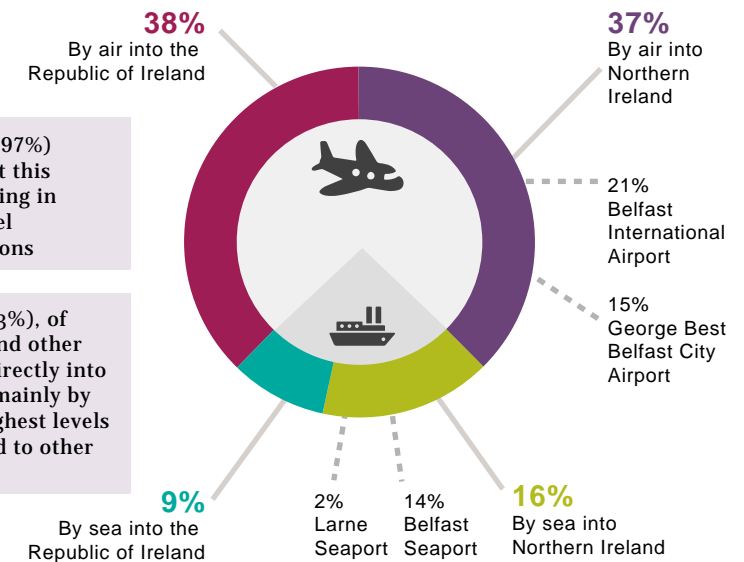
AGE



MEANS OF TRANSPORT INTO ISLAND OF IRELAND

The vast majority (97%) had decided to visit this region before arriving in NI, the highest level across all destinations

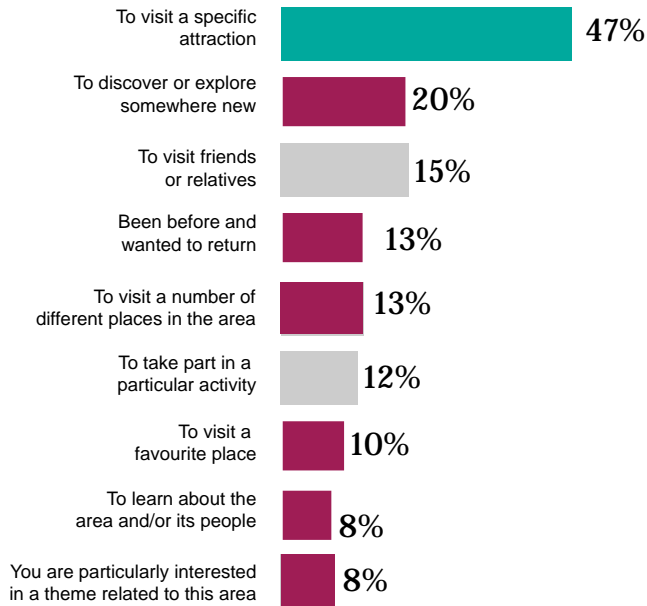
More than half, (53%), of visitors from GB and other overseas arrived directly into Northern Ireland mainly by air – one of the highest levels recorded compared to other destinations



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

DESTINATION GREATER BELFAST

KEY REASONS TO VISIT



Almost half of visitors to Greater Belfast were attracted to the destination because of a specific attraction. This destination also has an appeal for those wanting to discover or explore something new

34%

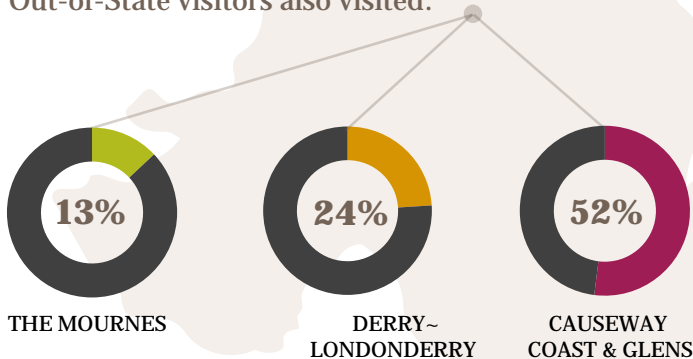
of all visitors chose this destination specifically to visit to find out stories, history and legends of Northern Ireland. This is reflected in that the key segment from GB and other overseas (based on their motivation for visiting NI) was Culturally Curious

■ Higher* than average for all destinations
■ Lower* than average for all destinations
■ Equal to average for all destinations

*Not necessarily significantly higher or lower

OTHER KEY DESTINATIONS ALSO VISITED

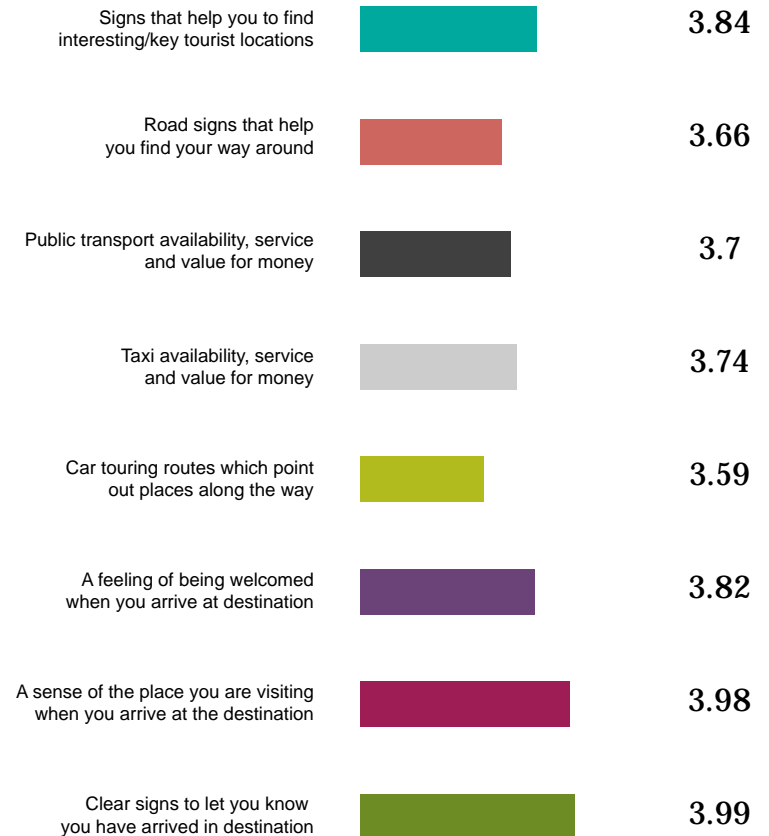
Out-of-State visitors also visited:



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



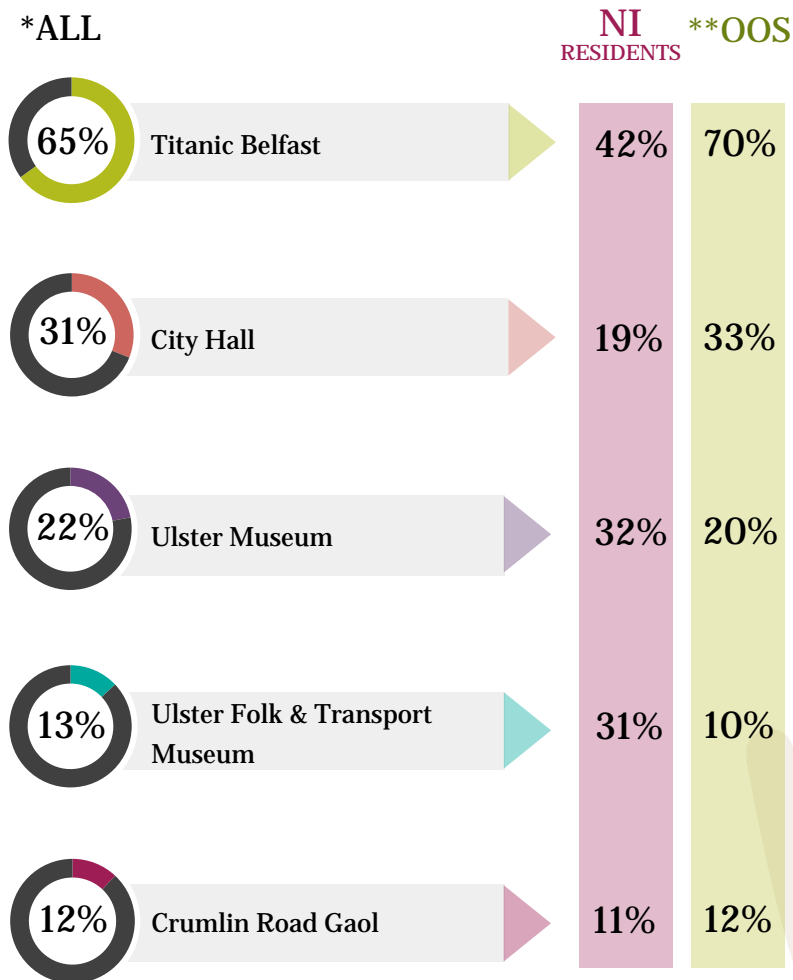
Mean scores 5=Excellent

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



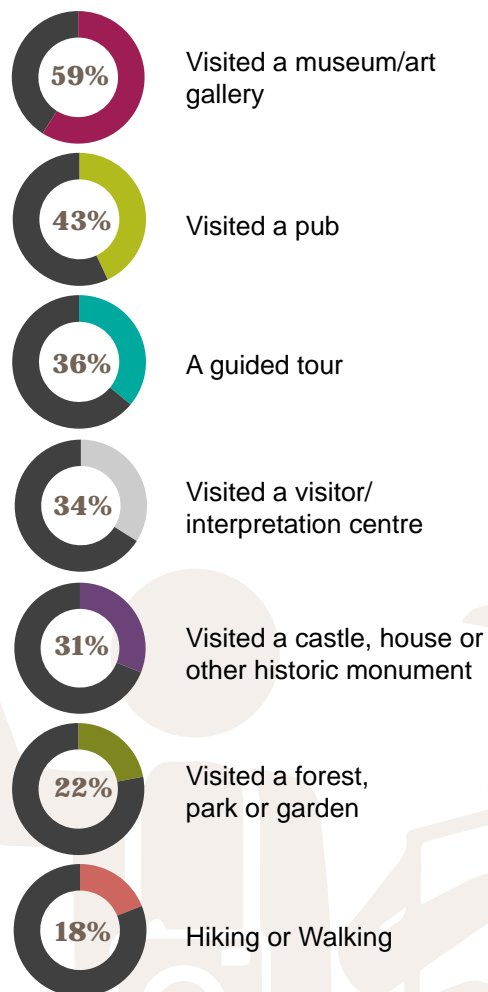
DESTINATION GREATER BELFAST

POPULAR PLACES VISITED

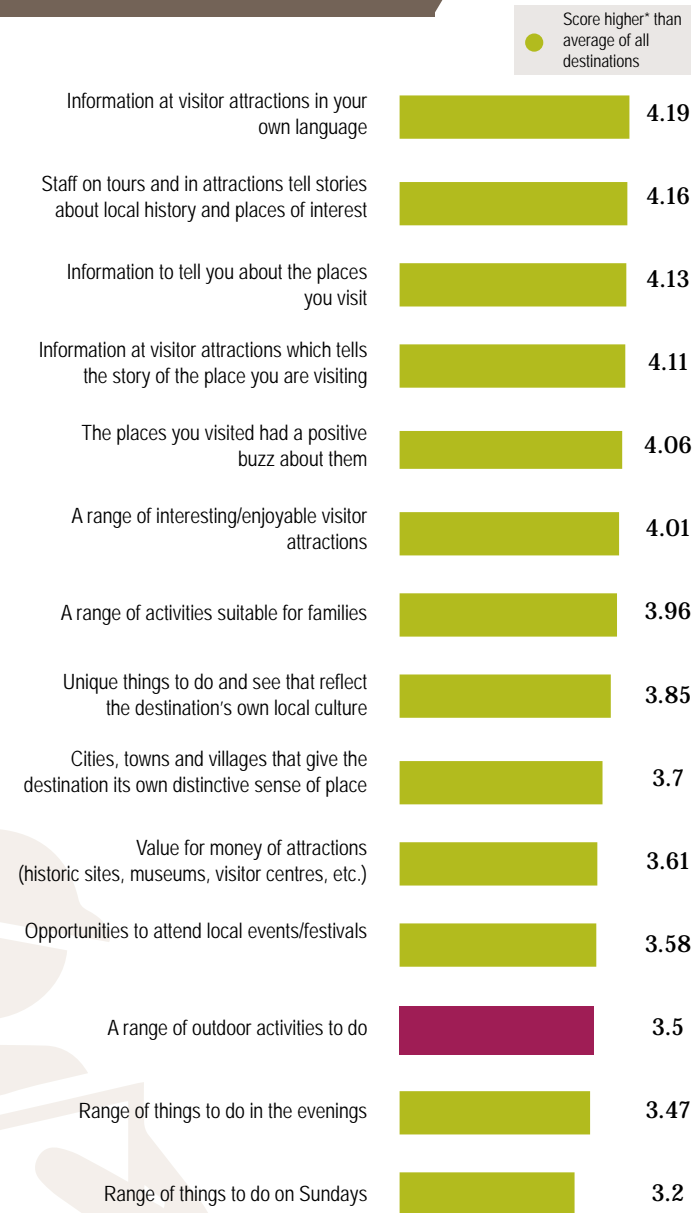


Compared to other destinations, visitors to this region were much more likely to visit a museum or art gallery. Visiting a pub or a visitor centre or partaking in a guided tour also feature strongly. As expected many of the key tourist locations including Titanic Belfast and City Hall were highly attractive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

ACTIVITIES



RATING OF OFFERING



*Based on all visitors to the region
**OOS refers to visitors from outside of NI

*Not necessarily significantly higher

Mean scores 5=Excellent

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



DESTINATION GREATER BELFAST

PLACES TO EAT



CAFES
47%

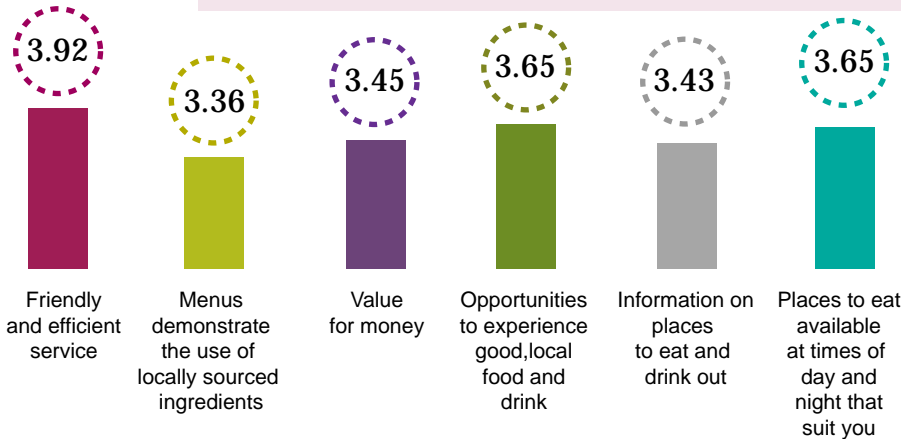


PUBS OR BARS
45%

Most popular types
of places to eat

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



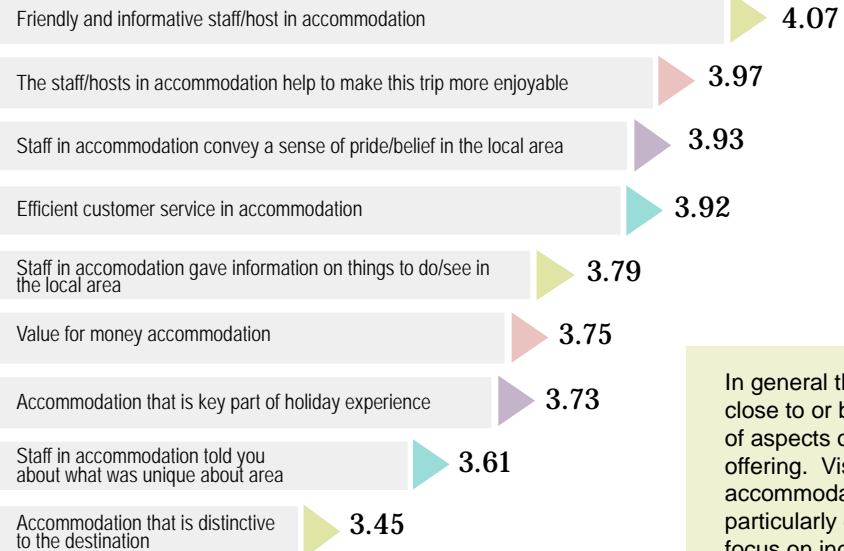
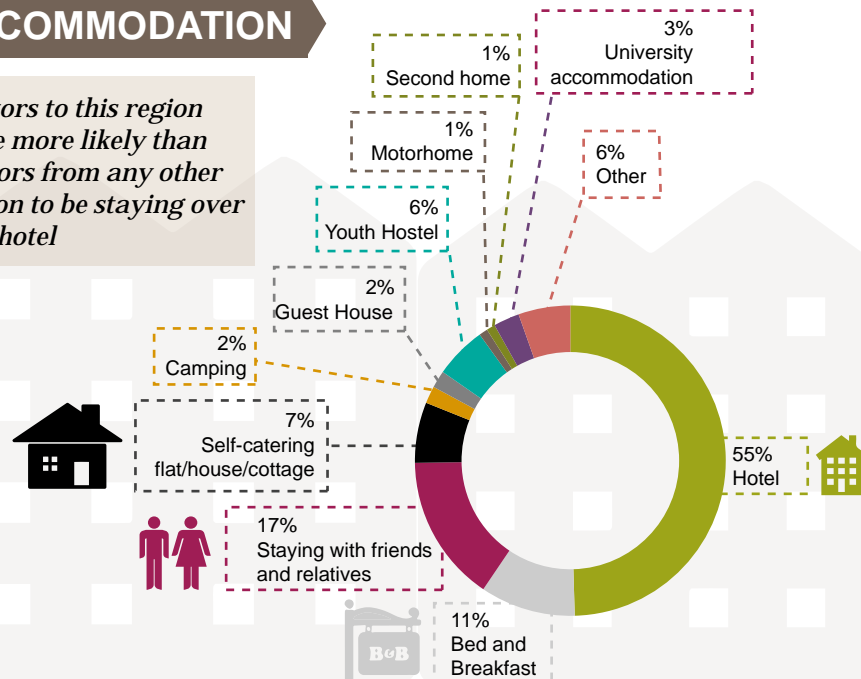
As a rule NI in general is not particularly well rated across most aspects of the eating out experience

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

ACCOMMODATION

Visitors to this region were more likely than visitors from any other region to be staying over in a hotel

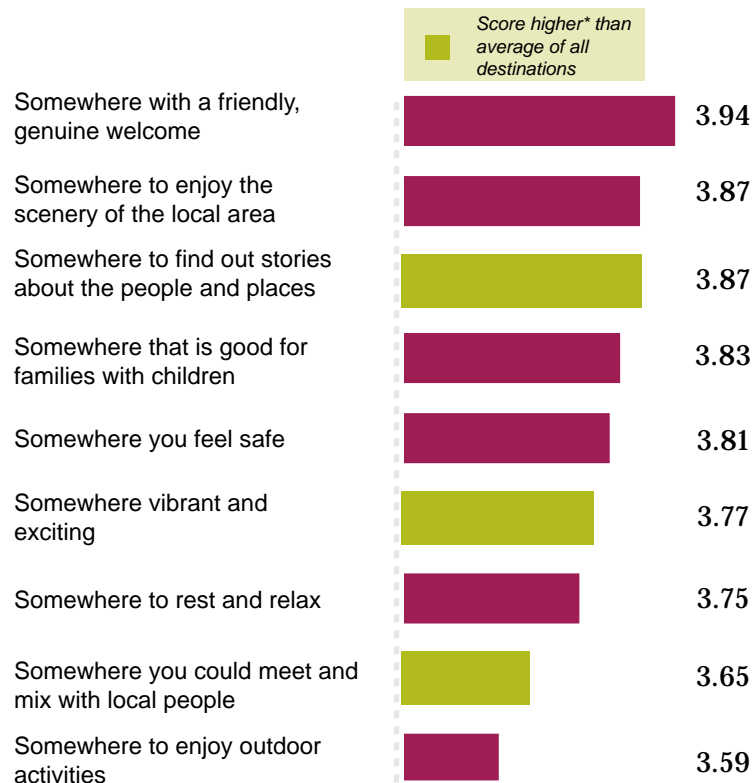


Mean scores
5=Excellent

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

DESTINATION GREATER BELFAST

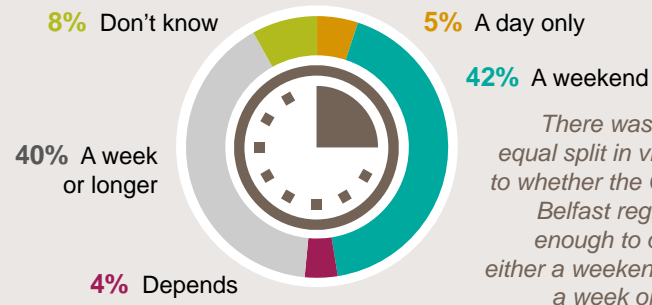
DESTINATION EXPERIENCE



*Not necessarily significantly higher

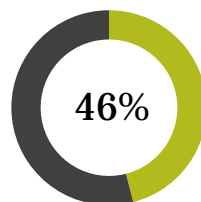
Mean scores 5=Excellent

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



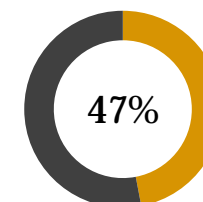
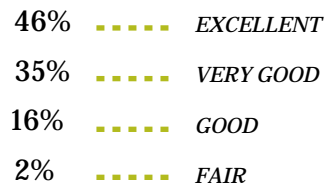
DESTINATION RATINGS

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



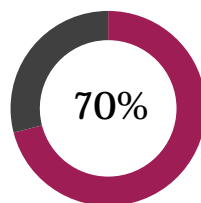
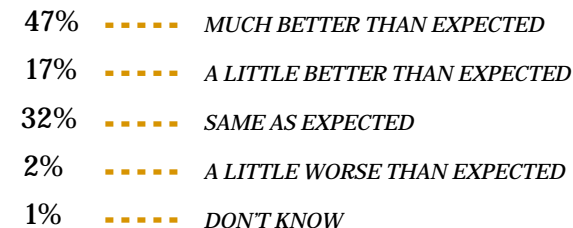
RATING OF TIME SPENT IN DESTINATION AS "EXCELLENT"

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



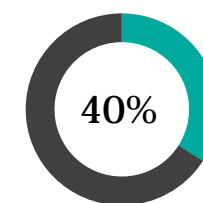
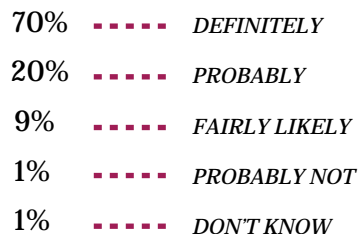
GREATER BELFAST IS "MUCH BETTER THAN EXPECTED"

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



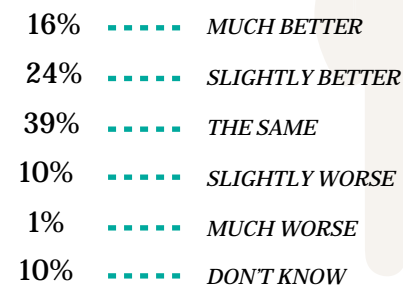
"WOULD DEFINITELY RECOMMEND AREA TO FRIENDS AND FAMILY"

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



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

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

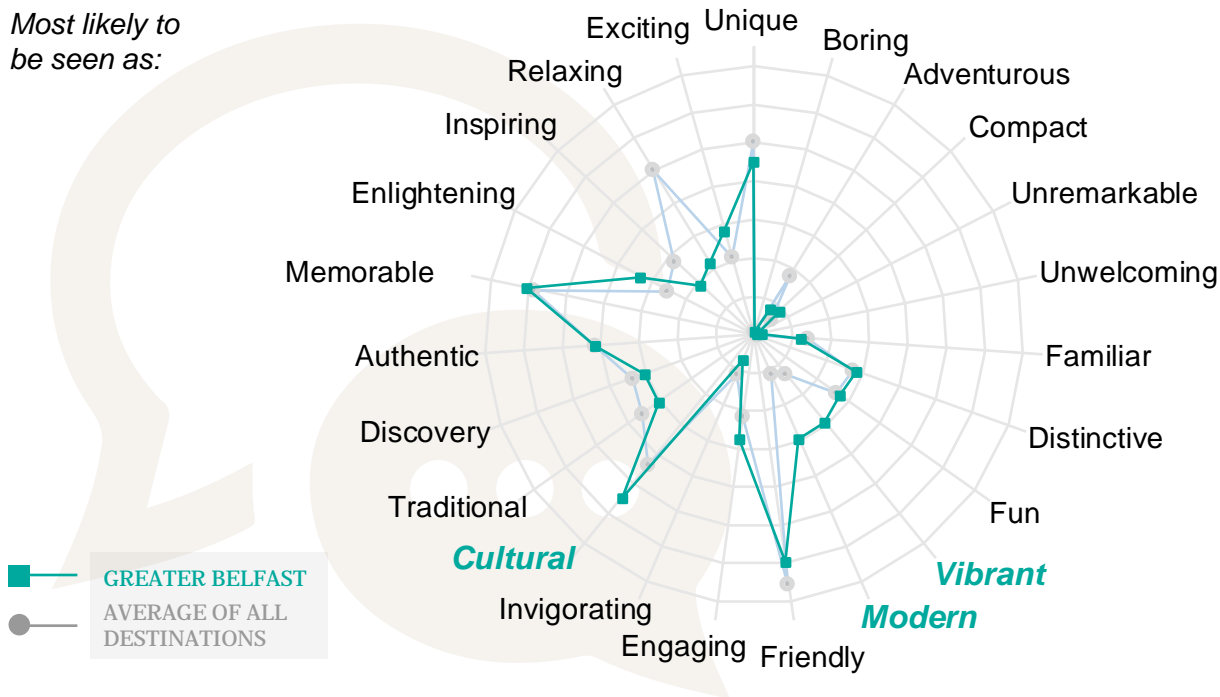


Source: Tourism Northern Ireland Visitor Attitude Survey 2014 (Millward Brown)

DESTINATION GREATER BELFAST

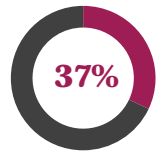
WORDS CHOSEN TO DESCRIBE DESTINATION

Most likely to be seen as:



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

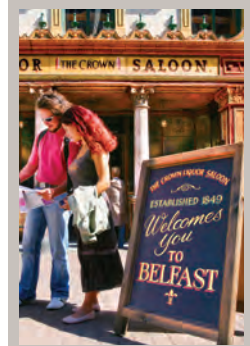
MEMORABLE EXPERIENCES



'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.'

'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.'

'...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...'

'Orienteering up the Cavehill in Belfast, great fun and challenging.'



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

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

DESTINATION GREATER BELFAST

● Higher than average of all
● Lower than average of all

MEASURE	GREATER BELFAST	AVERAGE FOR ALL DESTINATIONS
Visitor Information Centre - Friendliness and efficiency of service	4.33	4.49
Visitor Information Centre - Availability of useful information	4.27	4.42
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 - Suitable 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	4.1
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	4.15	4.08
That 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 friendly, genuine, 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 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	4.01
Information at visitor attractions which tells the story of the place you are visiting	4.11	4
Sense of the place when you arrive in NI	4.03	4
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	3.95
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	3.9
Range of interesting/enjoyable visitor attractions	4.01	3.9
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

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

DESTINATION GREATER BELFAST

● Higher than average of all
● Lower than average of all

MEASURE	GREATER BELFAST	AVERAGE FOR 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

For further information please contact Anne-Marie Montgomery at Tourism NI (a.montgomery@tourismni.com)

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

