



**visit
Belfast**



MEASURING THE **TRIPLE BOTTOM LINE IMPACT** OF BELFAST TOURISM

Insights Report June 2025



Belfast
City Council

Danske Bank



Introduction

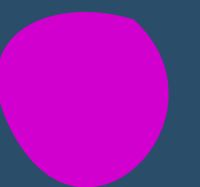
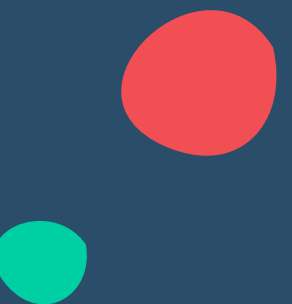
Visit Belfast has adopted 'triple bottom line' approach to measuring the holistic impacts of tourism - capturing environmental, economic, and social impacts in a single, integrated framework.

This insights report brings together the highlights from three pioneering projects undertaken by Visit Belfast:

- **Belfast's first-ever tourism carbon footprint study**, sponsored by Danske Bank and Belfast City Council and conducted by EY
- **The city's first resident sentiment survey** to measure attitudes towards tourism
- **Visit Belfast's first industry sustainability survey** to understand the environmental and social practices of its partners within the tourism and hospitality sector

This work builds on Belfast's impressive sustainable tourism journey, launched in 2020 with the city's first Resilience Strategy and Climate Plan, and accelerated through the commitment of partners across the tourism and hospitality sector.

Together, these studies create a vital evidence base to guide responsible, inclusive tourism growth, inform destination planning, and shape future investment and action—laying the foundation for a more sustainable, resilient, and people-centred visitor economy.



Economic Impact

The importance of tourism to the city and regional economy cannot be underestimated. Twenty-five years of tourism growth has welcomed millions of visitors to the city and been a catalyst for the regeneration of Belfast. It has established hundreds of new enterprises for our economy, thousands of jobs for our residents and created opportunities for our communities and neighbourhoods. Tourism has played an important role in enriching the culture and vibrancy of the city, as well as the quality of life for all who call Belfast home. The most recent NISRA (Northern Ireland Statistics & Research Agency) tourism statistics at local government level for Belfast in 2023 highlight a record year for tourism spend and trips.

Economic impact of Belfast tourism



£537m Spend
44% of NI Total



1.7m Trips
31% of NI Total



5.1m Nights
31% of NI total



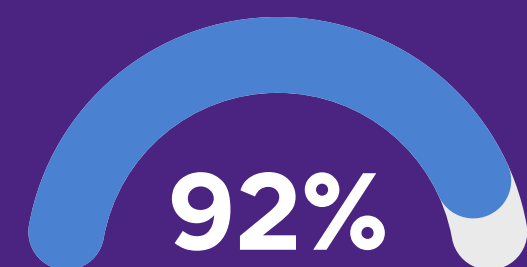
21,394 tourism jobs
30% of NI tourism Jobs

Data Source: NISRA 2023 Tourism Statistics - Local Government District Level

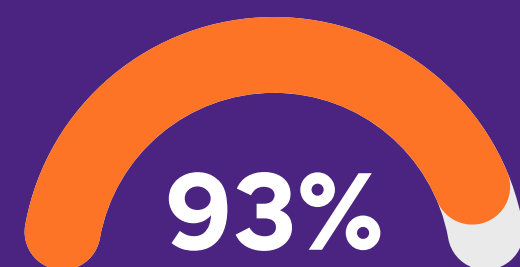
Social Impact

Belfast Resident Sentiment Survey Results - 24/25

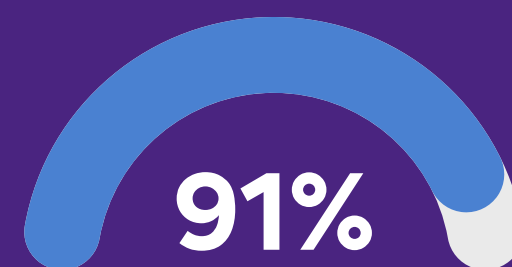
Visit Belfast conducted the first Belfast resident sentiment survey to measure attitudes towards tourism in Nov 2024 which demonstrates very high levels of support amongst locals.



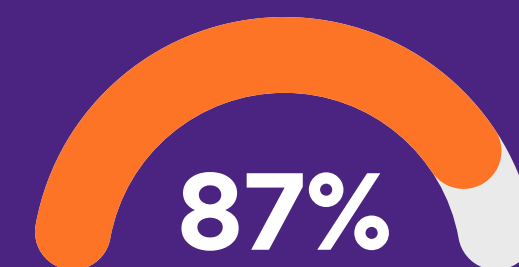
Residents believe tourism is beneficial for Belfast



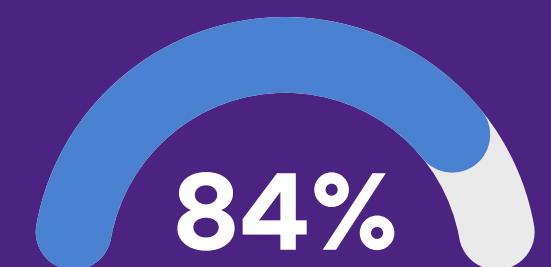
Tourism allows people to learn about Belfast's culture & history



Tourism supports local businesses such as bars, restaurants and attractions to remain open



Tourism helps to create a more vibrant Belfast with more things to see and do



Residents interested in taking part in more tourism activities

Social Impact

Industry Social Action - 24/25

Visit Belfast's industry sustainability survey was completed by 160 tourism businesses, 32% of all Visit Belfast's partners. Key findings include:

£1.4M

Raised for charitable and social causes

61%

of respondents had sponsored or hosted a local community event

30%

of respondents have a CSR strategy

77%

of respondents had supported a charitable or social initiative

Visit Belfast Social Action - 24/25



14,555 neighbourhood tourism enquiries managed in 24/25



Contributed 1,420 volunteer hours for conference, cruise and welcome centre



6,731 meals provided to vulnerable people in Belfast through Changing The Menu. For Good



361 students supported through educational outreach programmes

Environmental Impact of Belfast Tourism

Belfast Tourism Carbon footprint - Scope 1, 2 & 3



In **2023**, Belfast's tourism sector generated an estimated **485 kilotonnes** of CO₂ equivalent emissions.

10%

485 kilotonnes of CO₂e equates to approximately 10% of the city's total emissions, in line with the percentage of people employed in the sector.



In **2019**, Belfast's tourism sector generated an estimated **540 kilotonnes** of CO₂ equivalent emissions.

55%

Approximately 55% of Belfast emissions come from travel to and from the destination



The reduction of carbon emissions from 2019 to 2023 by 10% is likely due to the fact that Belfast's closer to home markets were quicker to recover post-pandemic than international markets. Annual data is needed to accurately track trends however, the findings offer a clear baseline to inform more strategic decision-making.

Environmental Impact of Belfast Tourism

Industry Action

Environmental Impact 24/25

Visit Belfast's industry sustainability survey highlighted an industry taking action:

- 96%** of survey respondents are adopting sustainable practices
- 77%** of Belfast hotel bedrooms hold a sustainability certification
- 51%** of survey respondents are measuring some or all of their carbon emissions
- 59%** of survey respondents are measuring their waste
- 15%** of survey respondents have offset some or all of their emissions

City Action

Environmental Impact 24/25



Since 2020, Visit Belfast and Belfast City Council have been working with city and industry partners to accelerate action on sustainability.

This collective effort has resulted in Belfast being ranked 9th out of 100 global destinations in GDS Index.

Conclusion

visitBelfast

Key Takeaways

- 1 Belfast tourism has high levels of support from residents in the city - 92%.
- 2 The carbon footprint of Belfast's tourism sector accounts for approximately 10% of the total footprint of Belfast.
- 3 55% of Belfast tourism's carbon footprint is generated by travel to and from the destination.
- 4 As Belfast's largest visitor markets are nearby (GB & ROI) it can be considered a relatively low-carbon destination compared to places with higher shares of international and long-haul visitors.
- 5 The majority of Visit Belfast industry partners are adopting sustainability practices 96%.
- 6 More than half of Visit Belfast's industry partners are now also measuring their carbon 51%.
- 7 The tourism Industry is genuinely a force for good in Belfast with over £1.4m raised for charitable and social causes by Visit Belfast industry partners.
- 8 Tourism is a significant driver of the city and regional economy but the longer-term economic resilience of tourism may be exposed to changes in taxation of carbon, which could impact travel costs and demand.
- 9 Belfast's tourism industry is taking action on sustainability but financial incentives, funding and capacity building is required to support the sector and destination to decarbonise at the pace required.
- 10 This work is an important first step, but securing a positive and resilient future for Belfast tourism will require ongoing collaboration across the industry, uniting businesses with key stakeholders to shape and drive progress together.

What our partners say....

“ Visit Belfast’s initiative to develop a tourism carbon footprint is among the most comprehensive we’ve encountered in the sector. This pioneering approach will provide the city with the robust evidence base needed to make informed, strategic decisions and to shape a sustainable decarbonisation pathway. Belfast can be considered a relatively low-carbon destination, largely because its largest visitor markets, Great Britain and the Republic of Ireland, are its closest-to-home markets. ”



YANNICK CABROL

Director of Economic Advisory services at EY

“ Belfast is dedicated to becoming an inclusive, climate-resilient, and zero-emissions city within a generation. Visit Belfast’s work reinforces that ambition by showcasing how the tourism industry can facilitate equitable, low-carbon growth that benefits local communities while minimizing environmental impact. ”



Belfast
City Council

COUNCILLOR MICHAEL DONNELLY
Chair, Belfast City Council Climate
and City Resilience Committee

“ At the GDS-Movement, we collaborate with over 100 pioneering destinations working to regenerate places, communities, and nature through tourism. Measuring and reducing the carbon impact of tourism is complex but essential. With this bold step, Visit Belfast is showing real climate leadership by transparently publishing its tourism carbon footprint. Coupled with a clear commitment to social equity, economic resilience, and strong community support, Belfast is setting a powerful example of how destinations can drive systemic change towards a more sustainable and inclusive visitor economy. ”



GUY BIGWOOD

Chief Changemaker at GDS Movement

“ The findings highlight that while we’ve made progress, access to green finance, policy alignment, and incentives are vital to fast-track the tourism sector’s transition to a low-carbon future. ”

Danske Bank

CHRIS MARTIN
Head of Sustainability
at Danske Bank

Next Steps

- Belfast has developed an innovative carbon measurement and monitoring model for tourism, which we will continue to improve and refine, to inform future planning and decision making.
- To encourage greater collaboration and support decarbonisation in Belfast Tourism, Visit Belfast will establish a Belfast Tourism Net Zero Working Group in 2025/26.
- Visit Belfast will continue to work with stakeholders, industry and policymakers to develop the triple bottom line approach to tourism measurement.

To find out more, contact:



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