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# 1. INTRODUCTION

There are now over 300 music events and festivals in Northern Ireland (NI) each year! While many are small, community-run events, there are more million pound operations than ever - Belfast Festival at Queen's and the City of Derry Jazz and Big Band Festival are two key examples.

Festivals such as the Coors Light Open House Festival, Glasgowbury, Appalachian and Bluegrass Festival, and Belsonic are growing rapidly and all attract over 10,000 visitors each year. Between them they feature internationally-acclaimed acts across most music genres.

This guide has been developed to outline the key trends in the NI festival scene, potential for growth, and show the large impact of music festivals on other sub-sectors within the tourism industry, particularly when there is a strong coordinated effort.

# 2. SETTING THE SCENE

Ireland has a strong music tradition which forms an integral part of the tourism industry, particularly for those looking for a cultural experience. The music tourism scene has changed dramatically over the past few decades from traditional Irish music and big bands in pubs and local venues, to internationally-renowned music festivals and 'A-list' concerts.

Foreign and domestic tourists now spend in excess of £100 million on cultural and recreational events in NI each year, with domestic tourists spending over £32 million on tickets to concerts and music festivals.

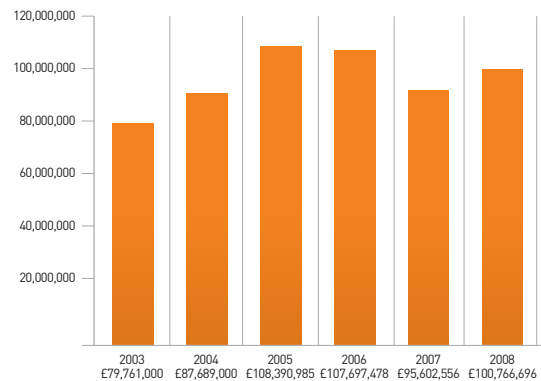
Though individual concerts in larger venues such as the Odyssey and Waterfront draw a significant amount of this income from gate receipts, the advent of low cost travel and lower priced tickets and accommodation in continental Europe means this sector is facing increasing competition.

Music festivals, however, present a more unique proposition and draw people from further a field for longer stays in the locality, making a significant impact on the local economy.

# 3. WHAT SIZE IS THE MUSIC TOURISM MARKET?

According to Mintel and NITB research, the market size for all recreational and cultural tourism<sup>1</sup> was worth over £100 million in 2008. This represented an increase of 5.4% on 2007 figures.

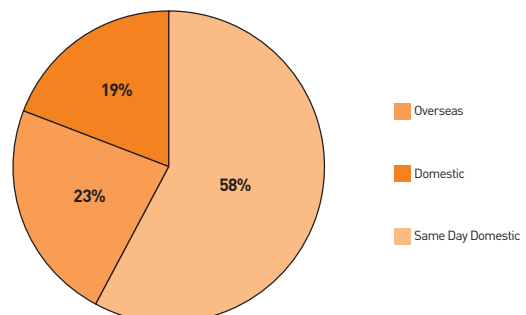
FIGURE 1:  
TOURIST EXPENDITURE ON CULTURAL AND RECREATIONAL ACTIVITIES, 2003 TO 2008



Source: NITB NIPS/Northern Ireland TSA/Mintel

Between 2005, when the market peaked, and 2008 the market declined by 7%. This is primarily due to a significant decrease in spending from overseas tourists, and a marginal decline in spending from same-day domestic tourists. Domestic tourists with overnight stays have increased their expenditure in this area.

FIGURE 2:  
EXPENDITURE ON CULTURAL AND RECREATIONAL ACTIVITIES BY TYPE OF TOURIST, 2008



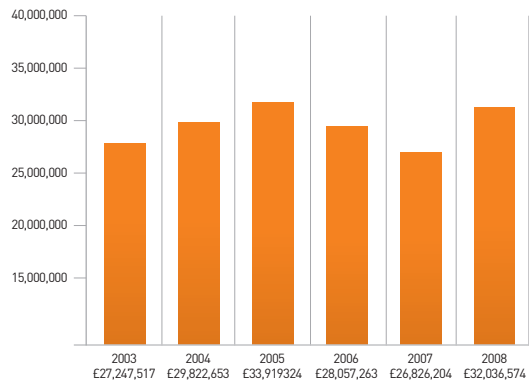
Source: NIPS/Northern Ireland TSA/Mintel

<sup>1</sup> Cultural and recreational activities include performing arts, museums, cultural sites and events, sports events and activities.

Same day domestic tourists account for 58% of the market, while total domestic tourism accounts for 77% of the recreation and culture market. The importance of domestic tourism to the market, and particularly the music festivals segment, is paramount for the industry.

From overseas, tourists from Great Britain (GB) and Republic of Ireland (ROI) have the most profound effect on the remaining 23% of the market. In light of the current economic environment, Mintel predicts that tourists from these markets will remain stable as tourists look closer to home for short breaks and low cost holidays. The current competitive exchange rates will also influence visitors, particularly from ROI.

FIGURE 3:  
EXPENDITURE BY NI CONSUMERS ON MUSIC FESTIVALS AND CONCERTS, 2003 TO 2008



Source: Mintel

According to Mintel, the domestic market for concerts and music festivals was worth £32 million in 2008. This was an increase of over 19% on the previous year and a decrease of 6% on 2005 when the market peaked. This latest increase can be seen in many of the music festivals in NI with some reporting up to a 50% increase in ticket sales and a 70% increase in revenue.

This excludes additional expenditure on food, drink, accommodation and other resulting expenditure.

Mintel estimates that the market will peak again for the whole year in 2009 and will be worth approximately £35 million. The market is not expected to grow at this rate over the next five years, but remain stable generating similar revenue to 2009 per annum<sup>2</sup>.

<sup>2</sup> Based on consumer surveys for 2009 and projected according to economic forecasts.

## 4. NORTHERN IRELAND FESTIVALS

Six of NI's top music festivals are profiled below. Together these attracted over 110,500 visitors, both domestic and foreign<sup>3</sup>, had combined revenues of approximately £2.7 million and injected an estimated £13 million into the local economy in 2009.

Festival	Location	Genre	Visitor Numbers	Ticket Price	Duration
Belfast Festival at Queen's	Belfast - Multiple Venues	Various	46,000	£5 to £30	2 Weeks
City of Derry Jazz and Big Band Festival	Derry - Multiple Venues	Jazz	26,000	£3 to £30	4 Days
Coors Light Open House Festival	Belfast - Multiple Venues	Folk and Traditional	15,598	£5 to £85	5 Days
Appalachian and Bluegrass Festival	Ulster American Folk Park	Bluegrass /Country	10,000	£5 to £51	3 Days
Belsonic	Custom House Square Belfast	Pop/Rock	10,000	£30 to £75	3 Days
Glasgowbury	Draperstown, Derry	Pop/Rock	3,000	£25 to £30	1 Day

Source: Festival Organisers/Mintel

### 4.1 Belfast Festival at Queen's

#### Overview

The Belfast Festival at Queen's has been running for 47 years and due to £1 million sponsorship from Ulster Bank is due to continue until at least 2010.

The festival attracted 46,000 visitors last year across 30 venues over its' 2 week duration, to a broad range of events across all areas of the arts including theatre, dance, music, comedy, film, literature and art.

<sup>3</sup> Includes all overseas visitors including ROI and GB.

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The range of music is equally diverse with acts from Rock, Pop, Classical, Acoustic, Folk, Jazz, Soul, Traditional Irish, Flamenco, A Capella and World Music. Due to the range of activities and events it attracts a broad range of ages, however there is a strong emphasis on the 18 to 24 age group due to their higher potential for return visits.

Previously the festival has attracted a number of big names such as Jimi Hendrix, Seamus Heaney and Yoko Ono.

## Impact

Due to the long duration and broad mix of events, tickets are sold for individual events rather than all access or multiple day passes. These cost between £5 and £30, with some free events. The festival sold 36,000 tickets in 2009 and issued a further 10,000 passes to free events, providing a box office revenue of £525,000. Total festival revenue including support and sponsorship equalled £1.8 million all of which was spent locally.

Beyond this the festival has partnered with a number of local hotels to cater for approximately 8.5% of visitors to the festival coming from overseas. Overall the festival contributed approximately £8 million to the local economy in 2009.

## 4.2 City of Derry Jazz and Big Band Festival

### Overview

The festival was founded in 2002 and has developed into one of Ireland's biggest music festivals with 26,000 visitors in 2008 over four days of events in multiple venues across Derry City. The festival has events for all age groups but primarily attracts those aged 30+.

The success of the festival has been further acknowledged and in 2008 the event was awarded Northern Ireland Tourist Board's event of the year in their annual tourism awards.

The festival is primarily associated with Jazz, but also has groups and performers from genres such as Rhythm & Blues, Soul, Gospel and A Capella.

In 2009 the biggest attraction at the festival was Jools Holland.

## Impact

A large number of performances are free to attend. Where tickets are required these are sold for between £3 and £35. Overall this created a revenue of £72,000 for the local council and further revenue for partnering venues, hotels, and local businesses. Being spread across the city, there is as much opportunity for off-site spending as there is for on-site spending by visitors.

The festival was estimated to be worth £1.25 million to the local economy in 2007 but has grown since then.

## 4.3 Coors Light Open House Festival

### Overview

The Open House Festival has been running for 11 years and in 2009 attracted 15,598 visitors (including 6,000 complimentary events and passes) over five days, reporting 51% growth on the previous year.

Visitors are of all ages, primarily between 18 to 50 year old. Of tickets sold (excluding complimentary tickets and passes) 48% were to Belfast residents, 46% were to residents from the rest of NI, and 6% were to visitors from outside NI.

Festival events are concentrated in the centre of Belfast across four bars with the bigger concerts taking place at Custom House Square.

The festival is based around the genres of Folk, Traditional and Americana.

Bands and performers in the line up are typically less well known than in other festivals in the NI events calendar.

## Impact

Tickets for the festival were priced between £5 and £25 for individual performances, while multi-day passes ranged from £60 to £85. This resulted in ticket sales of £125,000 and total revenue of £350,000 for 2009. Outside of gate receipts, factors contributing to the local economic impact included:

- The festival employs four full time staff, seven freelancers and 127 volunteers.
- Expenditure by overseas and ROI visitors (6% of total visitors) was estimated to be in excess of £172,000 with half of these staying in paid accommodation (primarily in nearby hotels), accounting for over 860 bed-nights.

- The average spend of overseas visitors was £300.
- In addition to this the festival paid for a further 614 bednights for artists and festivals guests (out of its own revenue) as well as meals and additional expenses.

## 4.4 Appalachian and Bluegrass Festival

### Overview

The Appalachian and Bluegrass Festival has been in existence for 18 years and is currently one of the largest Bluegrass events outside of North America.

In 2007 it attracted approximately 10,000 people and due to the genre and its location in the Ulster American Folk Park, attracts a large number of transatlantic visitors who combine music with genealogy activities during their stay.

The festival generally attracts an older audience with the average age of attendees equalling 50, however the festival does also attract family groups.

Bluegrass, Roots and Country music are the main genres of focus for the festival with top performers from North America, UK and Europe regularly in attendance. In 2009 Acousticure, one of the top Bluegrass bands in Europe, performed at the festival.

### Impact

Evening concerts cost £20 while daytime tickets cost between £5 and £8 with family tickets available. Weekend passes range from £42 to £51.

The last economic assessment of the Appalachian and Bluegrass Festival was conducted in 2004 when the festival had half of the visitor numbers than it has today. The impact for the local economy included the below:

- It was worth approximately £400,000 to the local economy.
- Visitors to the festival generated 1,460 bednights in local hotels and B&Bs.
- The average expenditure per visitor was over £110.
- Based on growth of the festival it is estimated that it is now worth in excess of £1 million to the local economy.

## 4.5 Belsonic

### Overview

The festival has only been running for two years in Custom House Square, Belfast, but has taken the place of the former Tennents ViTal music festival which ran from 2002 to 2007.

In 2008 the festival attracted approximately 10,000 people, building on similarly focused, earlier summer festivals such as Oxygen and the Electric Picnic.

The festival primarily focuses on rock and pop, attracting performers such as Dizzee Rascal, The Flaming Lips and Duke Special.

### Impact

Day tickets retail for around £30 including booking fees while 3 day tickets are available for £75. VIP tickets cost £50 for individual days. This has resulted in estimated revenue in excess of £300,000.

## 4.6 Glasgowbury

### Overview

Glasgowbury is held at Eagle's Rock in Draperstown, County Derry, and has been running since 2000. It attracted approximately 3,000 visitors in 2009, primarily from the 18 to 25 age group.

The festival has won 3 awards including Best Service and Best Family Festival from the Irish Festival Awards; selected by the Carnegie UK Trust as NI's 'Rural Spark' which should raise the profile of the festival for future years.

In 2009 Glasgowbury featured 47 Irish bands. The festival acts as a show case for unsigned acts from NI and bands signed to smaller independent record labels.

### Impact

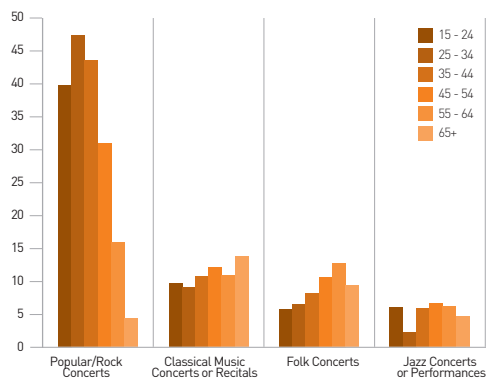
Tickets for the event were £25 for day passes and £30 for camping. Due to the majority of the visitors camping on site and the size and location of the festival, the impact on the local economy and particularly on local accommodation services is much more limited than the other festivals but it still draws revenues of approximately £90,000.

The festival organisers welcome on-site caterers but insist on these charging reasonable prices. Drinks are available at the festival and are provided through one of the local pubs in the Draperstown area.

# 5. WHO ATTENDS?

The majority of visitors to festivals come from NI. Knowing who to expect is vital in securing potential sponsorship and also helps us understand which marketing channels to use to reach our visitors.

FIGURE 4:  
PERCENTAGE OF NI CONSUMERS ATTENDING CONCERTS AT LEAST ONCE A YEAR BY AGE AND MUSIC GENRE, 2009

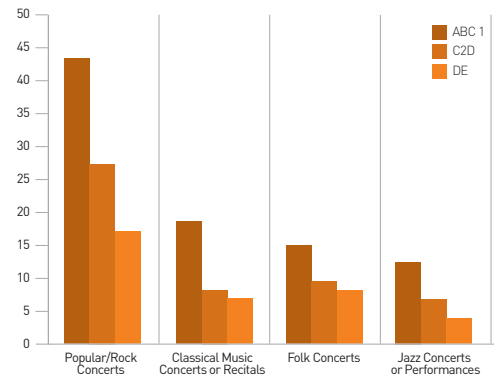


BASE: ADULTS AGED 15+  
SOURCE: TAKEN FROM THE BMRB TGI SURVEY OF APPROXIMATELY 2,000 ADULTS IN NI

Overall rock and pop concerts and events are most popular among the 25 to 34 age group, with those under 35 attending concerts more frequently than those in older age groups. Classical and jazz are more universal across the age groups, and those from older age groups are more likely to attend more than one concert in a year.

Folk music however is more appealing to older age groups and in terms of number of performances attended in a year: this is perhaps a reflection of the popularity of this genre in the 60s and 70s. With the success and growth of festivals such as The Appalachian and Bluegrass Festival, the popularity of this cannot be in any doubt.

FIGURE 5:  
PERCENTAGE OF NI CONSUMERS ATTENDING CONCERTS AT LEAST ONCE A YEAR BY SOCIO-ECONOMIC GROUP AND MUSIC GENRE, 2009



BASE: ADULTS AGED 15+  
SOURCE: TAKEN FROM THE BMRB TGI SURVEY OF APPROXIMATELY 2,000 ADULTS IN NI

More ABC1s attend concerts across all music genres, in terms of numbers going and the number of times they attend in a year. Folk concerts are the most universally popular across all socio-economic groups. It has been argued that genres such as classical are elitist and exclude those from other socio-economic classifications, however the price of tickets for these types of events are typically lower than for Rock and Pop events, making it accessible to all.

# 6. WHAT THE VISITOR WANTS

## 6.1 What they come to see

According to the 2007 NITB visitor survey, 4% of tourists holiday in NI primarily to visit a concert or event. Broken down by origin, 4% of domestic tourists and 4% of ROI tourists fall under this category while 14% of GB tourists visit specifically to visit a concert or event. Percentages of tourists from Europe and the Rest of the World coming to specifically attend a concert or similar event are much lower.

The numbers of tourists visiting NI for other reasons but attending a concert or festival are higher, with over 57% of visitors attending these doing so as a secondary purpose of their visit.

## 6.2 A cultural experience and something different

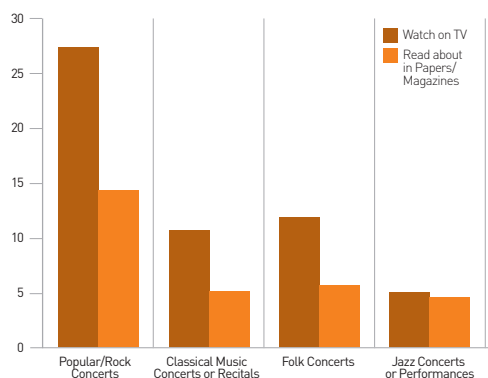
The most popular reason for visiting NI is to experience a unique culture. Promoting the Irish and unique aspects of an event is hugely important to attract overseas visitors to events. This is particularly important to attract tourists who are visiting NI for reasons other than festivals.

There is opportunity here to coordinate with tourist information points, particularly at airports and hotels, to capture visitors who may not have initially travelled to NI to attend a music festival but may be interested in the experience. Availability of last minute tickets is important and with many of the smaller events within festivals not selling out, there may be an opportunity for festival organisers to reach full capacity.

## 6.3 Reaching the audience

Publicising your event is vital to success and will raise a festival's profile in terms of visitors, performers and potential sponsors. Some of the NI festivals have received significant coverage on local radio and television, while most have a publicist to increase coverage across all forms of media.

FIGURE 6:  
PERCENTAGE OF NI CONSUMERS WATCHING/READING ABOUT EVENTS BY GENRE, 2009



BASE: ADULTS AGED 15+

SOURCE: TAKEN FROM THE BMRB TGI SURVEY OF APPROXIMATELY 2,000 ADULTS IN NI

The Internet is one of the most important channels to raise the profile of a festival. Coors Open House for example had over 279,000 website views between the 2008 and 2009 festivals and has thousands of followers on Facebook, MySpace and Twitter.

According to the Mintel UK Music Concerts and Festivals Report 2008, the Internet is now the core channel to sell tickets. More locally, for the previously profiled festivals, venue box offices, partner pubs and bus companies and tourist offices are also used successfully.

## 6.4 On-site sales

Drink is the most popular purchase by festival visitors with food less frequently purchased but still a key consideration. Festivals and events sometimes have a reputation for inflated prices for on-site sales however, some festival organisers in NI have adopted a policy of only allowing caterers on-site provided they offer good value for money.

Where this may reduce initial revenue, the reputation that NI, as a destination, is building for poor value-for-money food and drink is damaging to tourism as a whole, and in the case of festivals may reduce the likelihood of repeat visits and recommendations to friends, a key promotional aspect for NI visitor numbers.

# 7. WHAT THE VISITOR GETS

NITB conducted an online survey in November 2007 that measured attitudes and perceptions of visitors towards NI. This survey was used to discover positives and negatives of the NI experience.

## 7.1 Accentuate the Positives

The key strengths related to the NI festival scene concerned visitors' desire to experience a unique culture. Other strengths included:

- Somewhere with a friendly, genuine welcome.
- Somewhere distinctive with a unique culture.
- Opportunities for sightseeing in the countryside and coast.
- Somewhere to rest and relax.

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## 7.2 Challenge the Negatives

According to NITB's 2007 Visitor Attitude Survey, NI has a number of weaknesses which have negatively affected tourist perceptions. These include:

- Value for money in accommodation.
- Efficient customer service in accommodation.
- Ease of finding suitable accommodation.
- Opportunities to experience good, local food and drink.
- Menus that offer an interesting choice of food.
- Value for money of attractions.
- Clear signs to let you know when you have arrived.

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# 8. OUR CURRENT POSITION

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## 8.1 Strengths

- **A growing festival scene** – is present in NI with new festivals being added to a full calendar, enhancing our reputation as a festival destination.
- **ABC1s are our main visitors** – and also attend concerts and festivals more often than the other socio-economic groups making a good fit between the music and tourist scenes.
- **Domestic tourists are staying at home** – more often for their holidays and form the largest base of festival goers in NI.
- **All tastes are catered for** – in terms of the music genres covered by the current music festival calendar in NI.

## 8.2 Weaknesses

- **Poor value for money** – is a common complaint for tourists visiting NI, and premiums on food and drink at some festivals and concerts further accentuate this perception.
- **Poor road signs** – and difficulty for tourists finding their way around is a concern, and must be considered particularly where festival sites are in peripheral locations.
- **Bad weather** – cannot be helped and has, for UK and Irish visitors become integral to the festival scene, but may inhibit the ability to attract US and European visitors, particularly to outdoor events.
- **Small scale festivals** – are quickly growing but so far NI is less well known on the international stage, relative to the major events of the year such as Glastonbury.

## 8.3 Opportunities

- **Low cost holidays** – and short breaks are becoming more popular among ROI and GB visitors and there is opportunity to grow attendance from these visitors.
- **Last minute opportunities** – can be left for tourists to attend events as over 57% of visitors participate in festivals and events as a secondary activity on their break in NI.
- **Tourists come to experience the culture** – so there are opportunities to promote your festival as uniquely Northern Irish.

## 8.4 Threats

- **Mainland Europe costs less** – for concerts and festivals and with low cost flights from NI and its' key markets, there is increasing competition particularly for younger adults.
- **Complaints from locals** – pose a continuous threat to individual festivals and if not handled or mitigated can disrupt the smooth running of events.
- **Decline in US visitors** – to NI will cause damage to certain music festivals, particularly in the folk and country music genres.

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# 9. A FEW SUGGESTIONS

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## 9.1 Plan for visitors

If local businesses sit back and do nothing it's clear that a festival will still boost the local economy – through passing trade and sheer weight of numbers – but more can be done to generate further revenue and ensure repeat visits and a sustainable flow of tourists.

Promotions for visitors showing tickets at local cafes, restaurants and bars, competitive accommodation packages, and promotions in local shops will provide visitors with an enhanced and value-for-money experience, and build a close link between local businesses and the festival.

## 9.2 Coordinate for success

The better the relationship between festival organisers, landlords, local councils and local businesses, the better the event will be and the better the experience for the visitor. Successful festivals typically have all stakeholders operating to the same end and offering a coordinated package of events and products.

Planning and preparation is crucial so getting an early dialogue going will pay dividends during the running of the festival.

## 9.3 Push local services

The true benefit of festivals comes from all the services that support a festival visit. It is important for locals and local businesses to realise the benefit of these festivals and to gain the most from it. However to maintain the continued success of festivals and support from the local community there is a core role for the festival organisers.

Gathering lists of local businesses and services from councils and local traders' associations, and making visitors aware of what is available in the locality through programmes and events guides has the potential to increase the average visitor spend.

## 9.4 Understand the audience

Many of NI's leading festivals have a mixed audience from all age groups but some trends do emerge and relate to the earlier discussed consumer trends by genre. For example, festivals such as Glasgobury and Belsonic generally attract a younger audience, while festivals such as the Appalachian and Bluegrass festival are more appealing to the grey market.

Knowing who to expect and what other activities they might be interested in can boost the visitor experience and promote the area. Promotional brochures and literature, stands and internet access by local service providers at the events themselves could increase visitor numbers to other local amenities.

Potential areas for promotion include:

- Adventure activities and sports for younger adults.
- Hotels, restaurants, and spas for wealthier audiences.
- Activity centres for families.
- Historical sites and walking tours for older audiences.
- Vouchers for retail and local pubs.
- Festival menus at local restaurants.
- Promotion of up and coming events in the area.

## 9.5 Promote the area

There are hundreds of festivals being promoted each year, and all will have websites packed with festival-specific information. However, few include detailed information on the surrounding area. With many music tourists in NI primarily visiting for other reasons, it is of benefit to promote the area as well as the festival.

Links from the festival website to tourist websites, and websites of local and regional amenities can help promote the festival, giving potential tourists another reason to visit. It will also benefit local services through festival visitors potentially extending their stay in the area to take it all in.

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## 9.6 Sponsorship

Sponsorship has benefits for both the sponsor and the festival organiser. Mintel Ireland has found from consumer trends that sponsorship of events and festivals is more effective for increasing a sponsor's business than advertising through media. There are also promotional opportunities at events for sampling.

From the organisers point of view there are opportunities for co-promotion on the festival's website and the sponsor's website, advertising and promotional literature, increasing coverage and potentially increasing visitor numbers.

## 9.7 Get behind a cause

Many festival visitors, particularly younger visitors, are concerned with world issues and charitable causes, particularly when influenced by celebrity endorsements and ambassadorial work.

There is opportunity for festival organisers and the local business community to direct some of the proceeds from the event to a charity or cause, which will create further opportunities for co-promotion and co-branding with the supported cause.

The key issue is supporting something that your target audience can relate to.

## 9.8 Get the locals on side

Most festival organisers agree that it can only take a few valid complaints from local residents to cause disruption or even the end of a festival. Most have had to deal with some complaints as expected, but the key issue is communication and involvement.

Many of the festivals give long periods of notice to residents nearby to the festival while some provide free passes/tickets to residents where it is in a confined area. For example, the Coors Open House Festival gives residents in Customs House Square free tickets to the event.

Most of the festivals rely on volunteers from the local communities to make the festival a success and this involvement helps to mitigate any issues. Generally local business within festival areas welcome the festivals due to increased business, and local residents enjoy the increased coverage of their area in the media.

Overall festival organisers agree that the more coordinated the approach with local businesses and communities, the more successful the event and the more benefit for all stakeholders.

## 9.9 Encourage entrepreneurs

All five festivals offer some opportunity to local businesses, either as short-term employees, suppliers, or through taking trading pitches on site. Away from the festival there are plenty of money-making opportunities. Shops, cafes and pubs should be encouraged to stock up on 'festival essentials' like wellington boots, umbrellas and beer.

But think outside the box – for example, the Isle of Wight bus operator offers island tours for festival-goers while local residents who live close to the site sell car parking spaces and last-minute supplies.

## 9.10 Get on the trail

According to the Mintel International Report on Music Tourism, 2008, a growing trend in music tourism is tours incorporating a full package of travel, accommodation and a number of music events within a particular region or group of regions.

Australia-based Music Tours offers a package incorporating events throughout NI, ROI and the Edinburgh Tattoo in Scotland. This tour has been successfully running since 1995 providing an additional channel for the Northern Irish festival market. Tours such as these provide visitors from overseas the opportunity to attend a range of Irish-based music events and result in additional bed-nights in accommodation in the locality of the festivals and result in increased expenditure in local businesses.

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# 10. SOURCES OF INFORMATION

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In addition to interviews with a number of prominent music festival organisers the information contained within this document is based on data from the following sources:

- Northern Ireland visitor experience baseline and modelling, NITB, 2009
- Northern Ireland Tourism Facts, Knowing the Visitor 2008, NITB, Oct 2009
- Short Breaks report, Ireland, Mintel, July 2009
- Irish Lifestyles – Mintel, April 2008
- Music Concerts and Festivals – Mintel UK, August 2008
- Music Tourism – Mintel International, November 2008
- Northern Ireland Passenger Survey (NIPS), NITB, 2008
- Business Attitude Survey, NITB, 2007
- Visitor Attitude Survey, NITB, 2007
- Northern Ireland Tourism Satellite Accounts (TSA), 2005

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