

Belfast Purple Flag

July 2025



Project background

In July 2025, CARD Group Ltd conducted market research among visitors to Belfast City Centre, with a focus on the night-time economy.

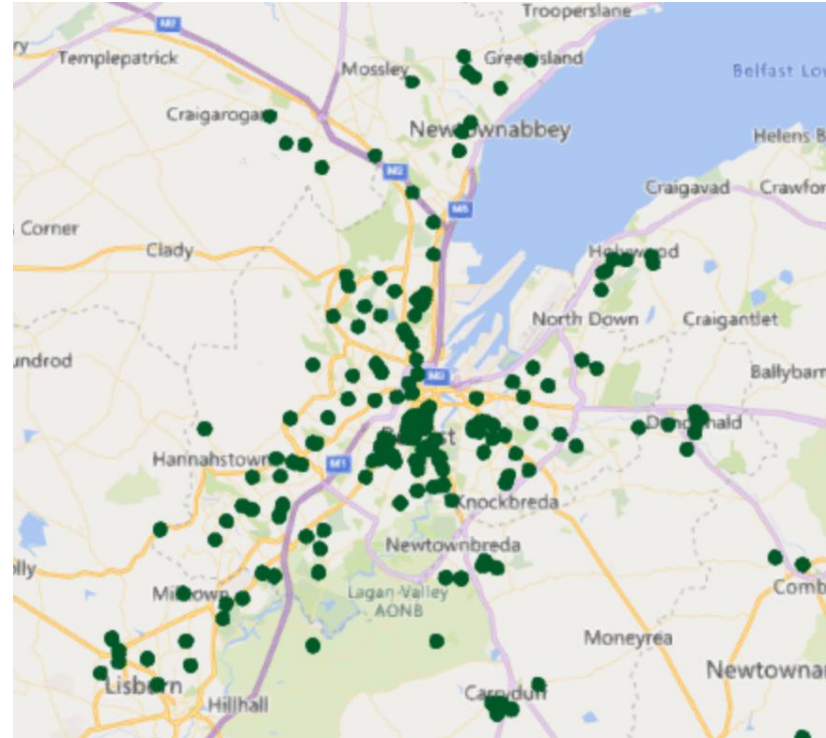
The methodology and questionnaire were agreed upon prior to the project, and data was collected through in-person surveys.

This report analyses responses gathered over four evenings, from Thursday 3rd July to Monday 7th July. Fieldwork took place each day between 5pm and 10pm.

The analysis explores where individuals go in Belfast during the evening and night-time, the barriers that prevent them from staying longer, and perceptions of transport, safety, and available activities in the city.

A total of 300 responses were collected, including 262 from residents of Northern Ireland, 17 from the Republic of Ireland, 8 from the rest of the UK, and 13 from international visitors.

Where did visitors come from?



Drive time of NI Visitors

■ Up to 15 Mins ■ 16 to 30 Mins ■ 31 to 60 Mins ■ Over 1hr

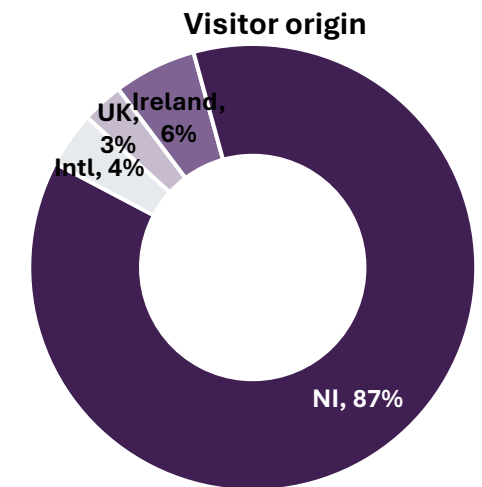


87% of respondents came from Northern Ireland extending to 93% when including Ireland south of the border.

7% of respondents came from beyond the island of Ireland, with 4% being international tourists.

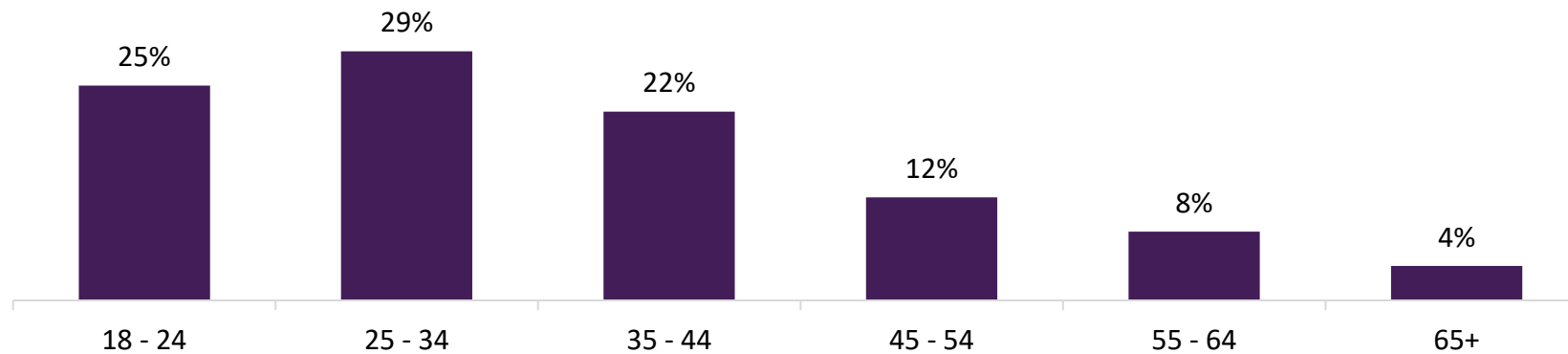
17% of visitors from Northern Ireland travelled more than 30 minutes to come to the city centre.

15% of respondents had purchased overnight accommodation. Among visitors from Northern Ireland specifically, this figure was 5%.



Who were the visitors?

Respondents by age group



The majority of respondents (66%) were aged between 18 and 44, with the most represented age group being 25–34, accounting for 29% of the total sample.

Overall, a broad range of age groups were represented in the sample.

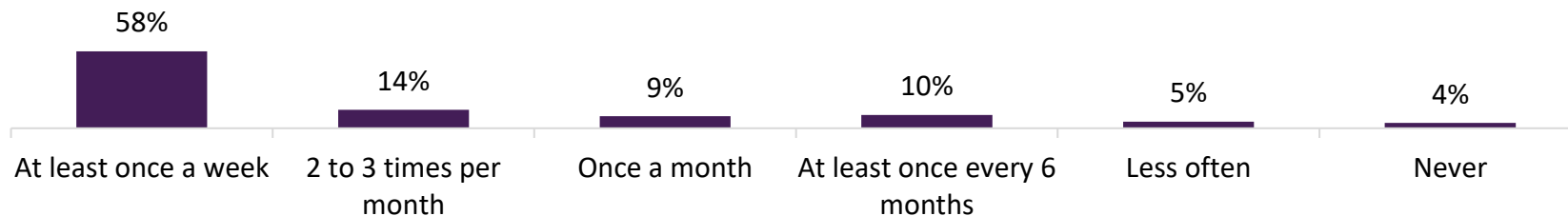
The gender split was relatively balanced, with a slightly higher proportion of female respondents (56%) compared to male respondents (44%).

Gender Split

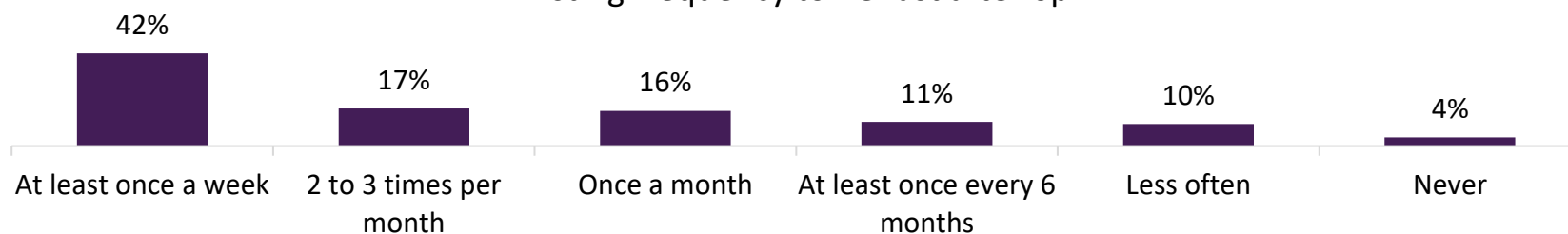


How often do you visit Belfast?

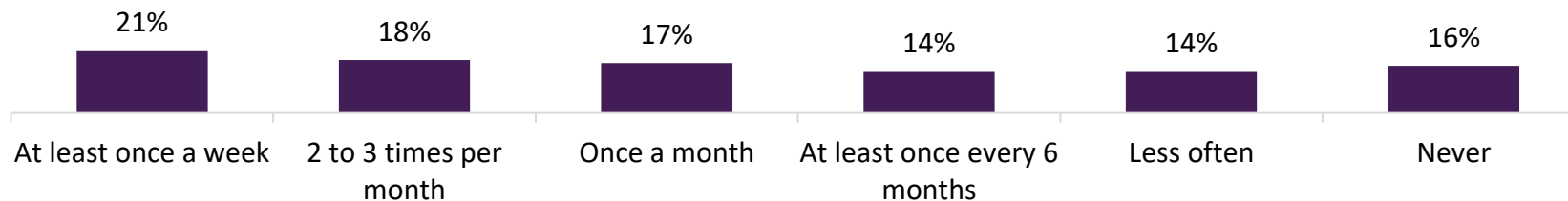
Visting frequency to Belfast before 6pm



Visting frequency to Belfast after 6pm



Visting frequency to Belfast after 10pm

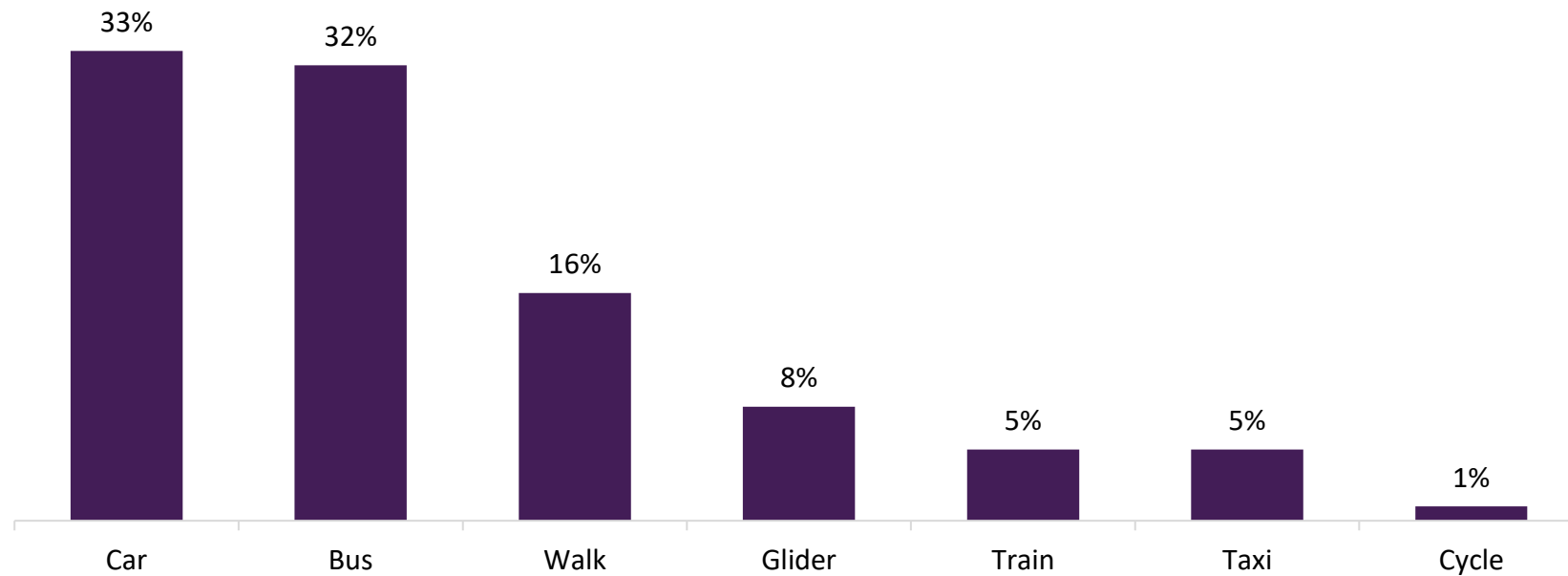


58% of respondents said they visit Belfast before 6pm at least once a week. This falls to 21% for those who visit at least once a week after 10pm.

Similarly, only 4% of respondents reported never visiting before 6pm, while this increases to 16% for visits after 10pm.

How did visitors travel to Belfast?

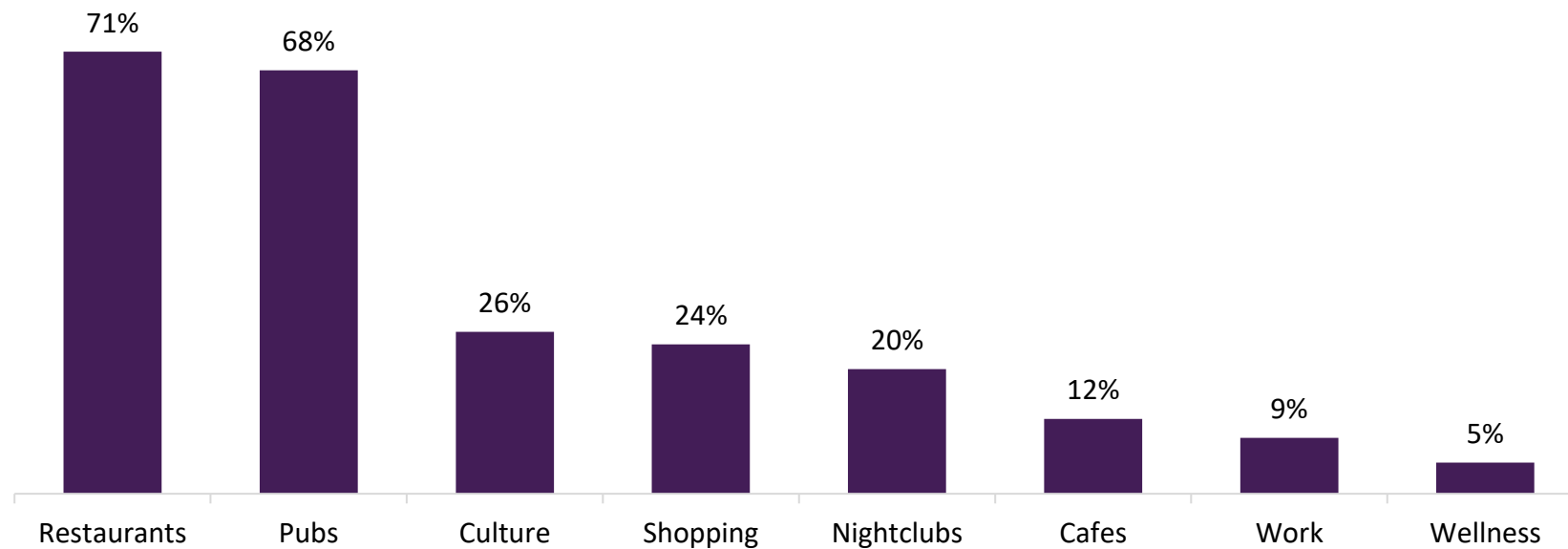
How do you typically travel to Belfast City centre?



Respondents were asked how they typically travel to Belfast in the evening or at night. Among Northern Ireland residents (n = 262), travelling by car was the most common mode (33%), closely followed by bus (32%).

Where do visitors go in Belfast in the evening?

Why do you visit Belfast at night time?



Respondents were asked why they visit Belfast at night. Over two-thirds reported visiting restaurants and pubs, while approximately a quarter said they go to the theatre or shopping.

Where do visitors go in Belfast in the evening?

Activity	Cathedral Quarter	Central city streets area	Victoria Square/ Castlecourt	Waterfront Titanic area	City Hall area	Linen Quarter (Great Victoria street/ Bedford street)	Linen Quarter (Dublin road/ Shaftsbury square)	Queens Quarter
Restaurants	63%	24%	26%	6%	26%	32%	13%	14%
Pubs	82%	12%	6%	5%	13%	28%	28%	21%
Culture	38%	8%	0%	32%	6%	41%	3%	26%
Shopping	1%	52%	92%	0%	10%	6%	3%	1%
Nightclubs	72%	8%	0%	0%	7%	15%	20%	12%
Cafes	27%	43%	43%	3%	24%	16%	8%	19%
Work	23%	27%	12%	4%	12%	15%	4%	8%
Wellness	50%	7%	0%	0%	0%	21%	0%	29%

Cathedral Quarter was the most popular destination for Restaurants, Pubs, Nightclubs and Wellness among respondents.

For Shopping, 92% of respondents identified Victoria Square and Castlecourt as their preferred destinations.

For other activities, responses were spread across a variety of areas, with no single location dominating.

What do visitors spend on a night out in Belfast?

What do visitors typically spend on a night out in Belfast for each of these activities?

Activity	Restaurants	Pubs	Culture	Shopping	Night clubs	Cafes	Work	Wellness
Average	£52	£56	£71	£106	£51	£15	£12	£19
Minimum stated	£10	£5	£10	£10	£5	£4	£2	£1
Maximum stated	£200	£200	£504	£400	£200	£35	£60	£65

The table shows the average spend of spending parties across all activities. Respondents reported the highest average spend on shopping (£106).

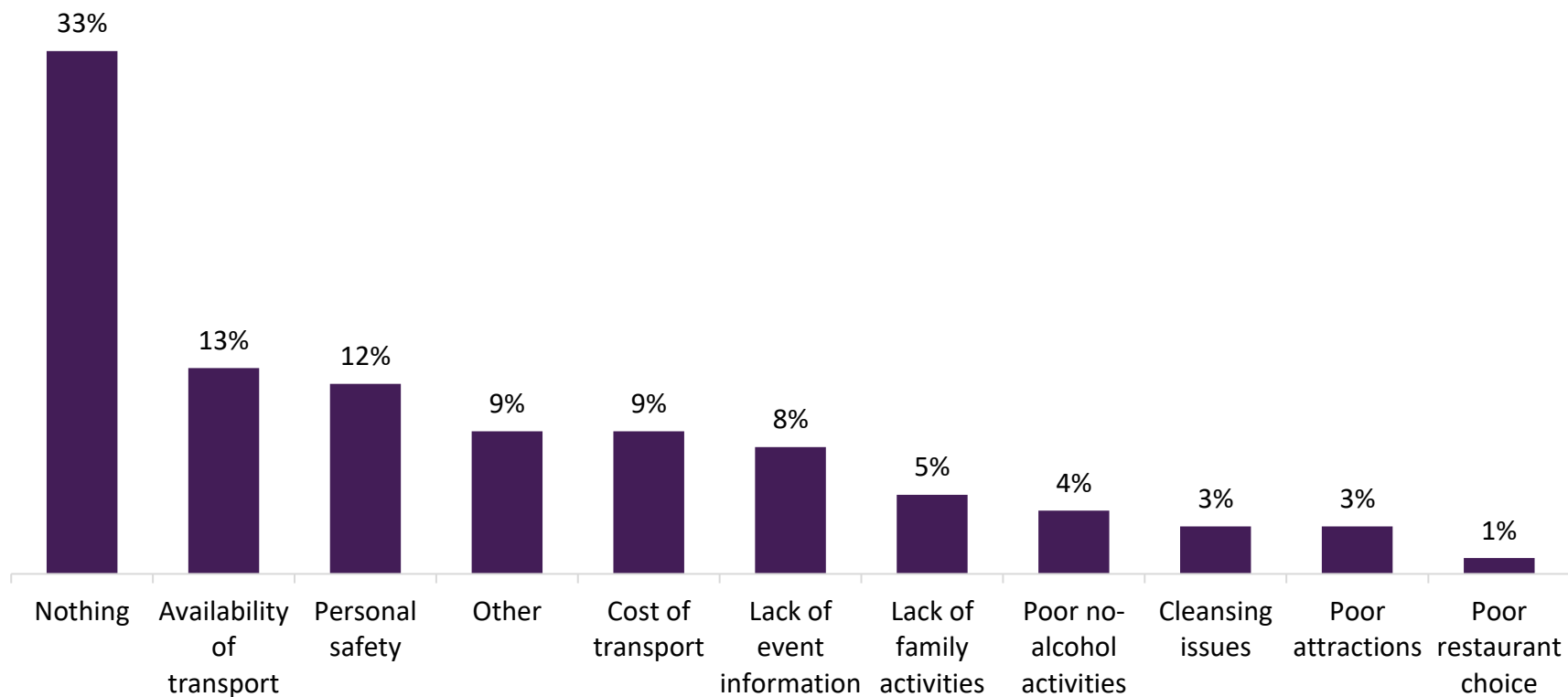
Average spend across all activities and respondents was £141.

This sum included for example:

- Pre-theatre dinner, show tickets, interval drinks and parking.
- Taxi to and from city centre venue, nightclub entrance, drinks and take-away. (not including 'pre' drinks).

Barriers to visiting Belfast in the evening

What prevents you from visiting Belfast during the evening?



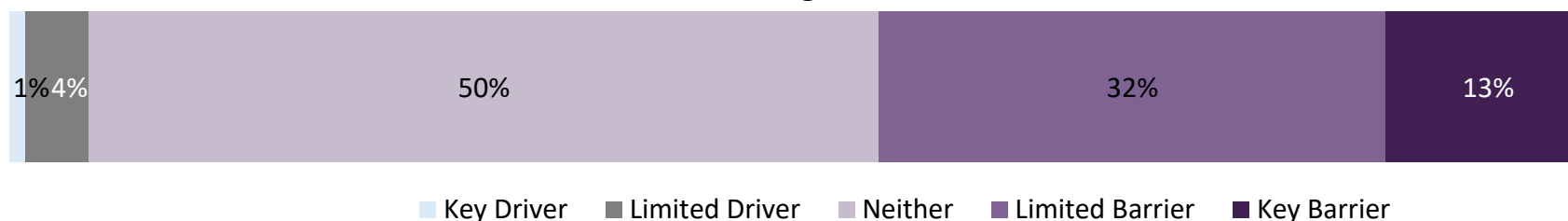
33% of respondents said that nothing prevented them from visiting Belfast in the evening.

Among those who did report barriers, 13% cited the availability of transport and 12% mentioned safety concerns.

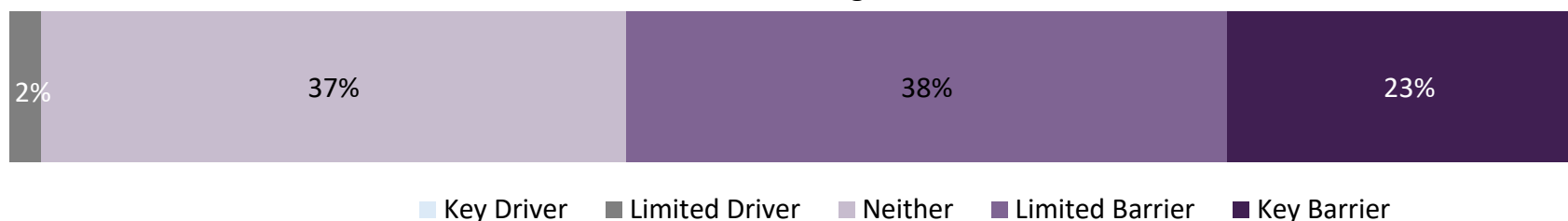
9% of respondents indicated other reasons prevented them from visiting, with distance and having alternative options closer to home being the most commonly mentioned.

Barriers with cost and availability of transport

To what extent is the **cost** of transport cost a barrier to visiting Belfast in the evening or night time?



To what extent is the **availability** of transport cost a barrier to visiting Belfast in the evening or night time?



For residents of Northern Ireland (n=262), when asked whether the cost of transport was a barrier to visiting Belfast in the evening or at night, 45% of respondents said it posed either a limited or significant obstacle.

Availability of transport services was an even greater concern, with 61% indicating that it presented at least some level of barrier to evening or night-time visits.

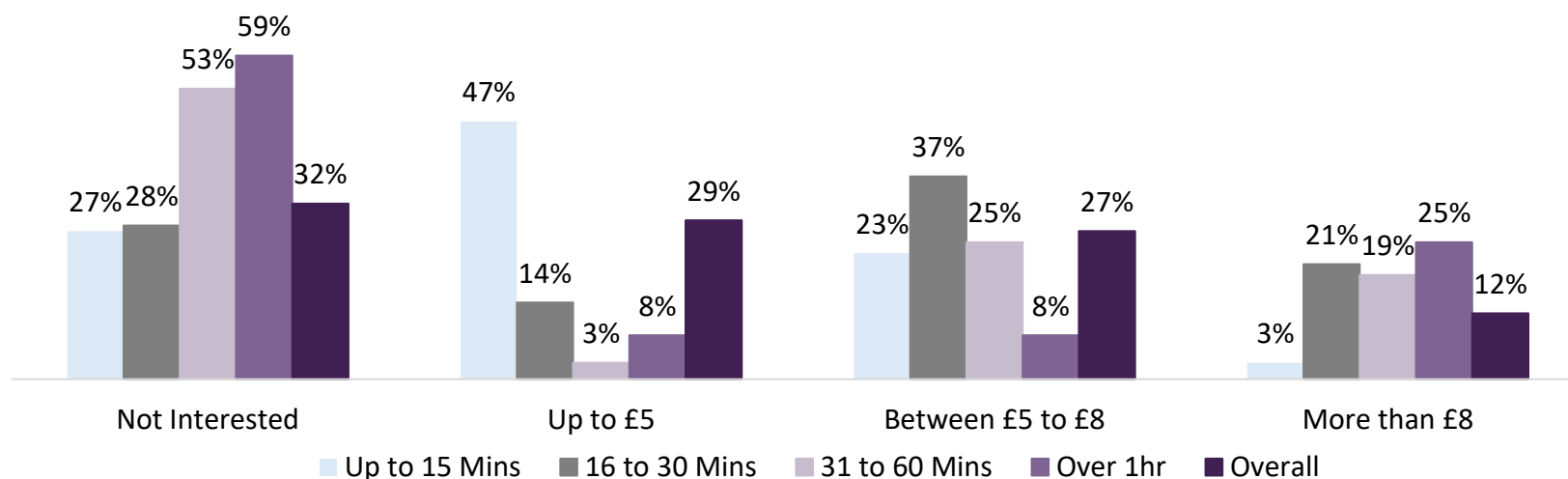
Availability of late night services

If late night buses, trains or Gliders were available would you use them to get home from city centre?



Two-thirds of respondents (66%) indicated they would use late-night buses, trains, or Glider services to travel home from the city centre if available. Notably, 39% of those who typically drive said they would use this service.

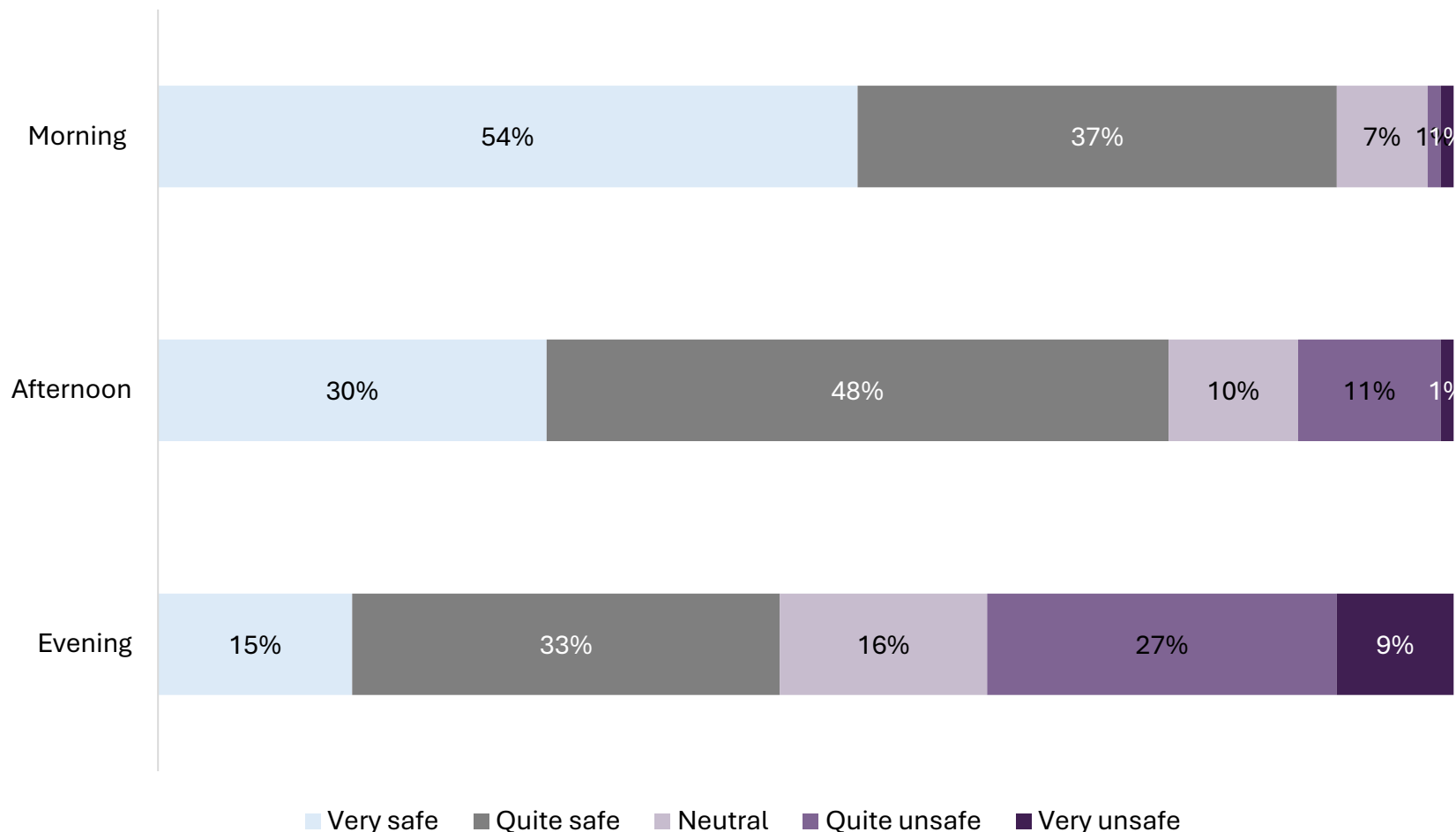
If buses, trains and Gliders after 11pm were available, how much would you be willing to pay for a trip home?



In terms of cost, 47% of respondents living within 15 minutes of the city centre said they would be willing to pay up to £5 for a late-night transport service. Among those living 16–30 minutes away, 37% indicated they would pay between £5 and £8. Respondents travelling from further distances were less likely to express interest in using the service.

●●● Perceptions of personal safety in Belfast

How would you regard Belfast City Centre in terms of feelings of personal safety across the different times of the day:

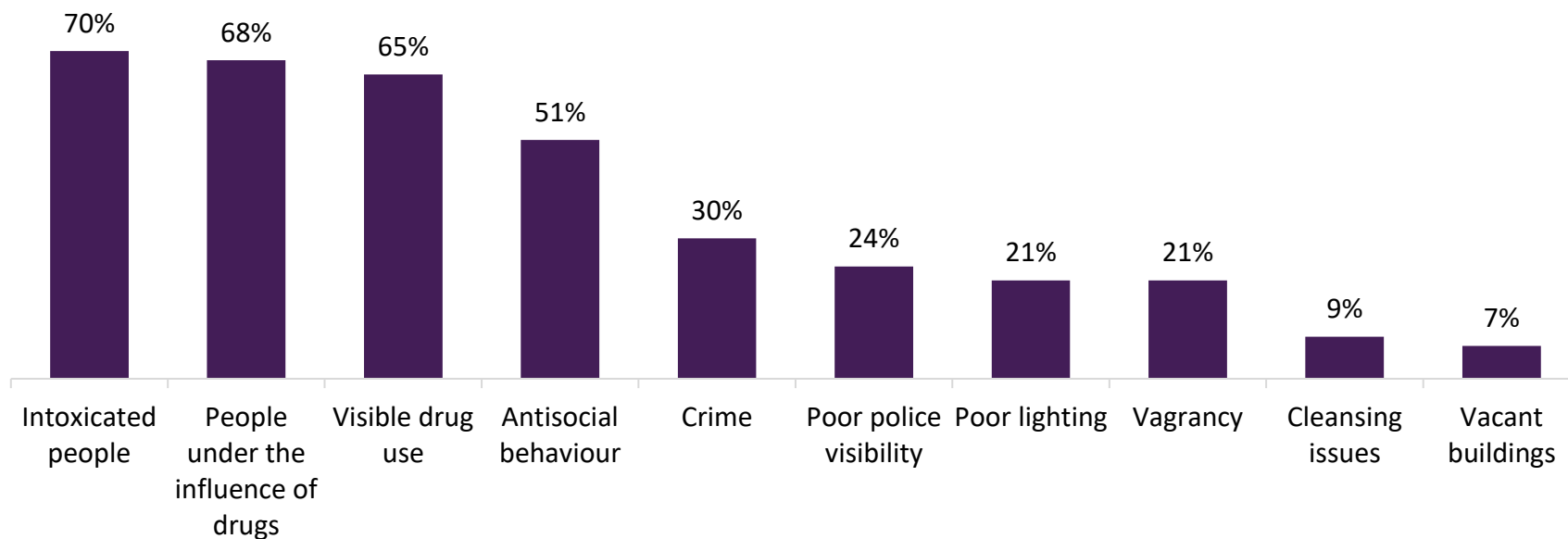


91% of respondents said they felt either quite safe or very safe in the morning. However, this figure drops significantly to 48% in the evening.

Conversely, the proportion of respondents who reported feeling quite unsafe or very unsafe rose from just 2% in the morning to 36% in the evening.

●●● Perceptions of personal safety in Belfast

What are your specific concerns about personal safety?



Over half of respondents expressed safety concerns related to intoxicated individuals, drug use, people under the influence of drugs, and antisocial behaviour.

When asked whether there were specific areas they avoided, 43% of respondents said yes, with Royal Avenue and Castle Street being the most commonly mentioned.

●●● Awareness of welfare services

Which of these emergency/welfare charities and campaigns which operate during the Night Time Economy in Belfast are you aware of?



86% of respondents reported awareness of at least one emergency or welfare charity or campaign. Among the 43 individuals who were not aware (23 female, 20 male), 23 were residents of Northern Ireland (13 female, 10 male).

Female respondents awareness of the Ask for Angela campaign



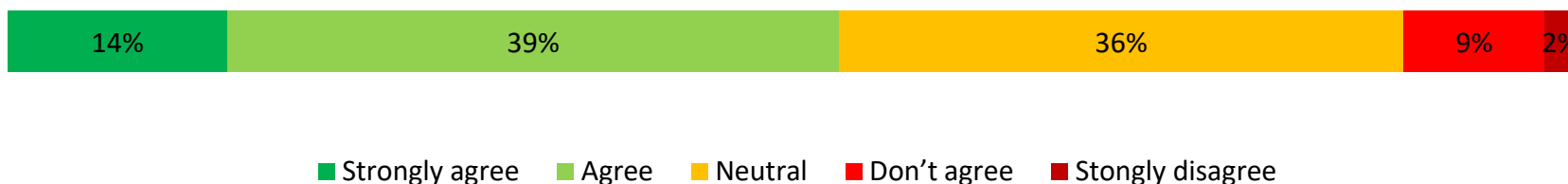
Among female respondents, 67% were aware of the Ask for Angela campaign. This rose to 69% among those who were residents of Northern Ireland.

●●● Perceptions of what Belfast evenings offer

To what extent are you aware of any range of non-alcohol focussed Evening / Night Time Economy activities in Belfast City Centre?



To what extent would you agree that there are suitable options for family orientated activities in Belfast's evening economy? E.g. cinema, Grand Opera House etc.



68% of respondents said they were not aware of any non-alcohol focused evening activities in Belfast City Centre. Among those who were aware, common suggestions included cinemas and escape rooms.

Just over half of respondents (53%) either agreed or strongly agreed that there are suitable options available for family-oriented evening activities.

Additional Comments

"Better safety measures for women because we have to take more expensive modes of transport home just because we are more at risk."

"I feel that the city centre is getting more dangerous with drug use increasing. There needs to be better security presence to stop people being harassed."

"If there was late night transport I would visit more."

"It's ok getting into Belfast, the problem is getting home."

"More frequent bus services would be welcomed."

"More late-night coffee options would be appreciated. Longer opening hours and extended public transport services would help reduce the need to rush home."



For further information please contact:

CARD Group head office

hello@card-group.com

+44 (0) 28 9447 7463