

Year 2 Business Plan

New Horizons for Belfast

2024-2027 Strategy

2025-26 Business Plan

**visit
Belfast**

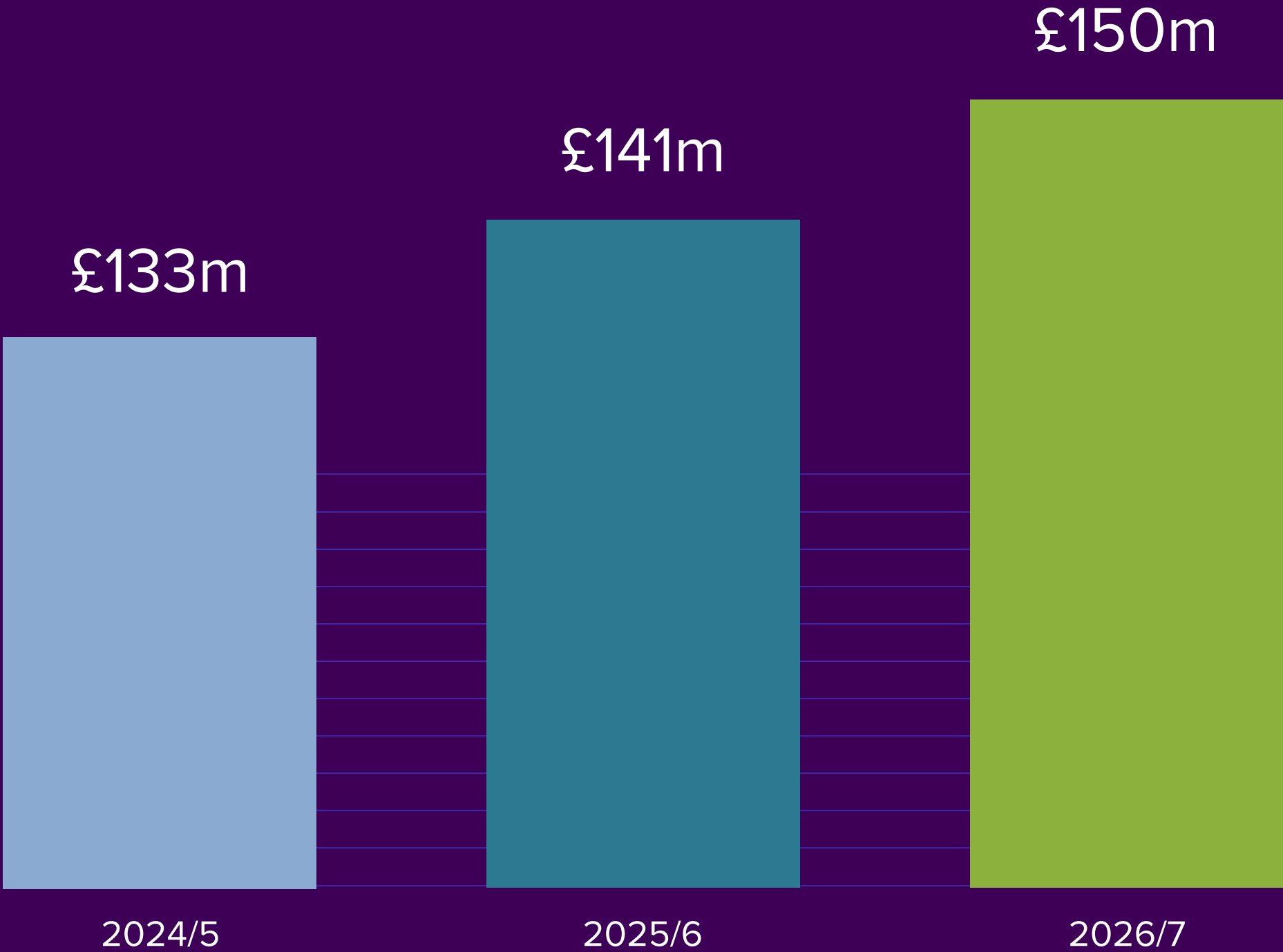


Belfast

3-Year Growth Targets

£424m economic impact
20% growth
6.5% growth p.a
30:1 RoI

Social
Environmental
Impact





Strategy: Key Pillars

GROW

Value of tourism to Belfast City region and its communities

POSITION

Belfast City region as a must-see destination for leisure and business tourism

EXPERIENCE

Enhance the visitor experience by showcasing Belfast City region's unique neighbourhood offer

SUSTAIN

Accelerate work on sustainability, pioneering impactful initiatives and telling Belfast's sustainability story

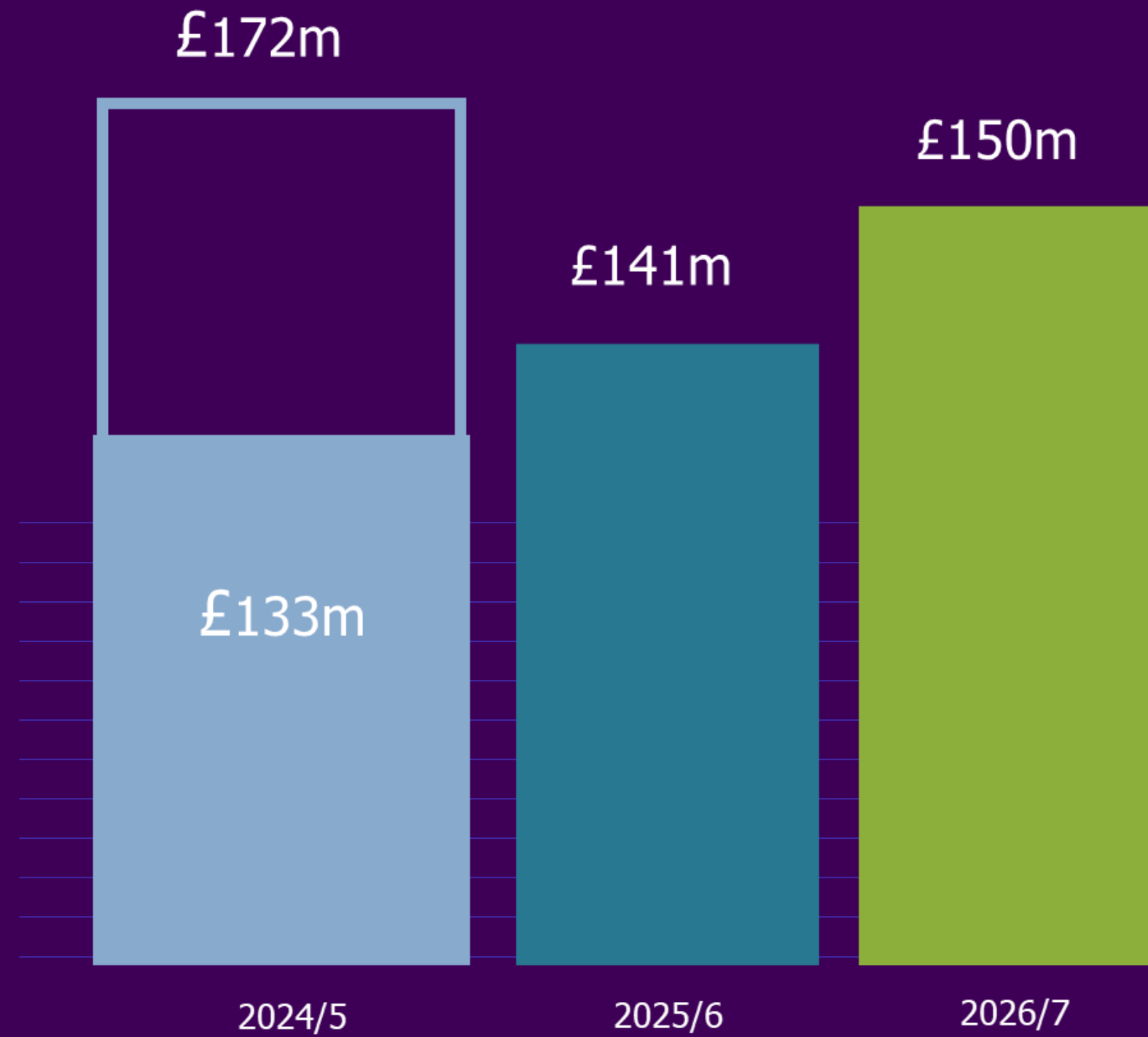


24-25 PROGRESS TO DATE

YEAR ONE
PERFORMANCE

24/25 Economic Impact

ROI
35:1



24/25 Performance Highlights

£102M	1.8M	45M	205M	625K BEDNIGHTS
Leisure economic impact	Web visits	Social media views	WOTS	8 leisure marketing campaigns

£32M	114	31K	89K	2 GLOBAL AWARDS
Business events economic impact	Business event wins	Delegates	Bednights	Best CVB 2024 Best events destination 2024

£33M	618K	259K	100%	NO.1
Visitor servicing & cruise economic impact	Visitor Enquiries	Cruise Pax 2024	Visitor Satisfaction	Best TIC 20th Year

Social Impact

First Belfast resident survey on tourism sentiment

92%

Residents believe tourism is beneficial for Belfast

93%

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

91%

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

87%

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

84%

Residents interested in taking part in more tourism activities

Charity and social impact

£1.3M*

Raised by VB industry partners for charitable and social causes (30% responses to date*)

56,672

Meals provided to vulnerable people in Belfast through VB's Changing the Menu for Good Social Impact programme

MANCHESTER & CAMBRIDGE

rolled out Changing the Menu for Good supported by VB

1,384

Students supported through educational outreach programmes via VB business events

Environmental Impact

Measuring Belfast's Tourism Carbon Footprint

- VB BCC and EY - developing a pioneering tool to measure and model Belfast's tourism carbon impact
- Industry forum being established
- VB carbon footprint being measured and monitored
- Visit Belfast Gold Award - Green Tourism
- First multi--venue citywide reusable cup pilot to reduce SUP at concerts/events



Top 10 sustainable destination in the world - 2024

Accelerating sustainability action at city, industry and visitor level

9TH/100

Belfast is ranked Top 10 globally in the Global Destination Sustainability Index

HIGHEST RANKED UK & IRELAND DESTINATION

76% HOTELS

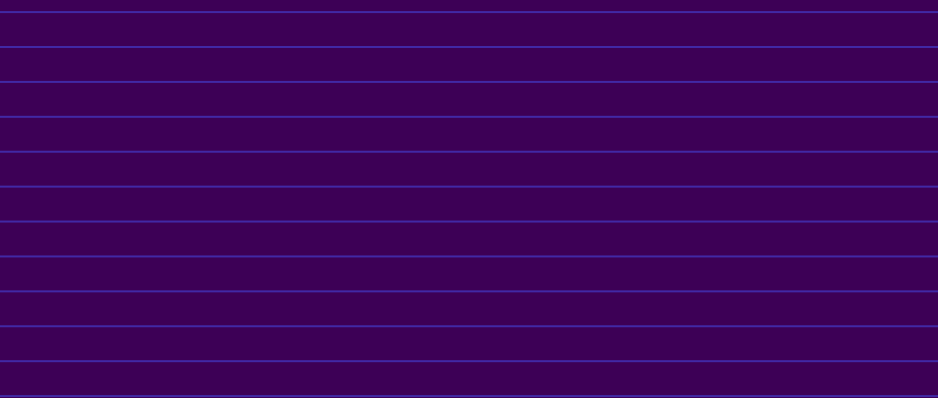
Belfast Hotel Rooms hold a Green Tourism / B corp sustainability certification

77 BUSINESSES

Industry partners and clients supported on sustainability



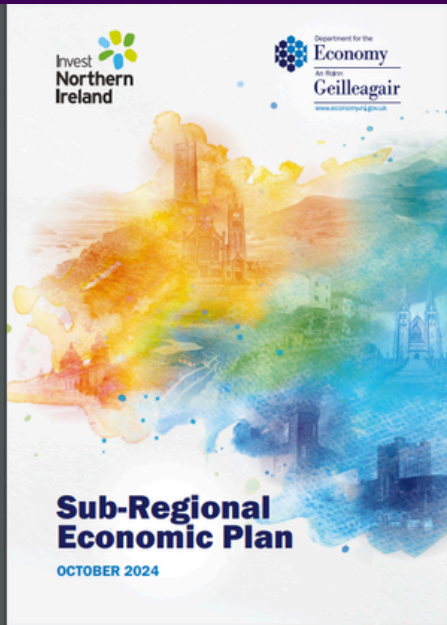
CONTEXT & OUTLOOK



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Policy Context

NATIONAL CONTEXT



CITY CONTEXT



Market Context

8 super trends

- 1 Strong Tourism Demand vs. Climate Concerns
- 2 Diverging Consumer Behaviours (Cost-of-living vs luxury)
- 3 Business Resilience Amid Rising Costs
- 4 Over-tourism and Resident Sentiment
- 5 Sustainability vs. Value for Money
- 6 Evolving Urban Tourism
- 7 Seasonal Shifts
- 8 The Digital Frontier



2025/6 Outlook: Opportunities

MAJOR EVENTS

153rd Open

Oireachtas na Samhna

Fleadh Cheoil na hEireann

STRATEGY

NI Tourism Action Plan

Neighbourhood tourism

BRCD projects & regionality

NI travel trade strategy

INVESTMENT

+700 - 1355 rooms

Private Sector Investment

Grand Central - Dublin hourly

D3 Cruise Hub & growth

GROWTH

ROI, GB & US demand

Premium/luxury demand

Food and drink tourism

Peace Tourism

2025/6 Outlook: Challenges

ECONOMIC

Cost of doing business

Cost of living

Belfast costs for visitors

Public finances & funding

POLICY

ETA roll out

Regional Balance

Green Claims Directive

INFRASTRUCTURE

Hotel capacity (peaks)

Air connectivity

Transport - nighttime economy

Coach parking

EXPERIENCE

Staffing & service levels

Complex lives & anti-social
behaviour

2025-26 Focus Areas

- Growing demand by leveraging major events and infrastructure
- Expanding year-round demand - shoulder season & midweek
- Capitalising on increased tourism demand for Belfast to spread benefits of tourism including into our city neighbourhoods
- Demonstrating sustainable leadership and innovation
- Promoting Belfast's emerging luxury and premium offer
- Extreme collaboration across industry partnerships
- Driving growth and innovation through AI, digital and data
- Developing our people and next-generation talent within Visit Belfast and across our industry





25-26 DELIVERY

MARKETING & COMMUNICATIONS



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Targets & Outputs

350,000 bed nights

250,000 day visits

£62m leisure tourism spend

6 marketing
campaigns
100m impacts

2.6m
web visits

26.9m
video views

18,000
new email
subscribers

6 publications
1.5m readership

49m
social media
impressions

495,000
social media
followers

150m PR WOTS

3.8m
social
engagements



2025-26 Digital Focus

To stay ahead of digital trends, we will focus on:

Enhancing visitbelfast.com – A user-centric, accessible, and interactive platform with improved SEO and personalisation.

Prioritising short-form video – Leveraging Instagram Reels, TikTok, and user-generated content for authenticity and engagement.

Optimising social media – A balanced organic and paid strategy to maximise visibility.

Building creator partnerships – Strengthening audience connections through long-term collaborations.

Advancing email marketing – Personalised, automated, and seasonally aligned campaigns.

Leveraging AI – Enhancing content, search, and user experiences.

Adopting a test-and-learn mindset – Continuously refining digital channels, messaging, and content formats.

Next Generation for VisitBelfast.com

Next-gen VisitBelfast.com: Launching June 2025, with partner workshops showcasing new functionality.

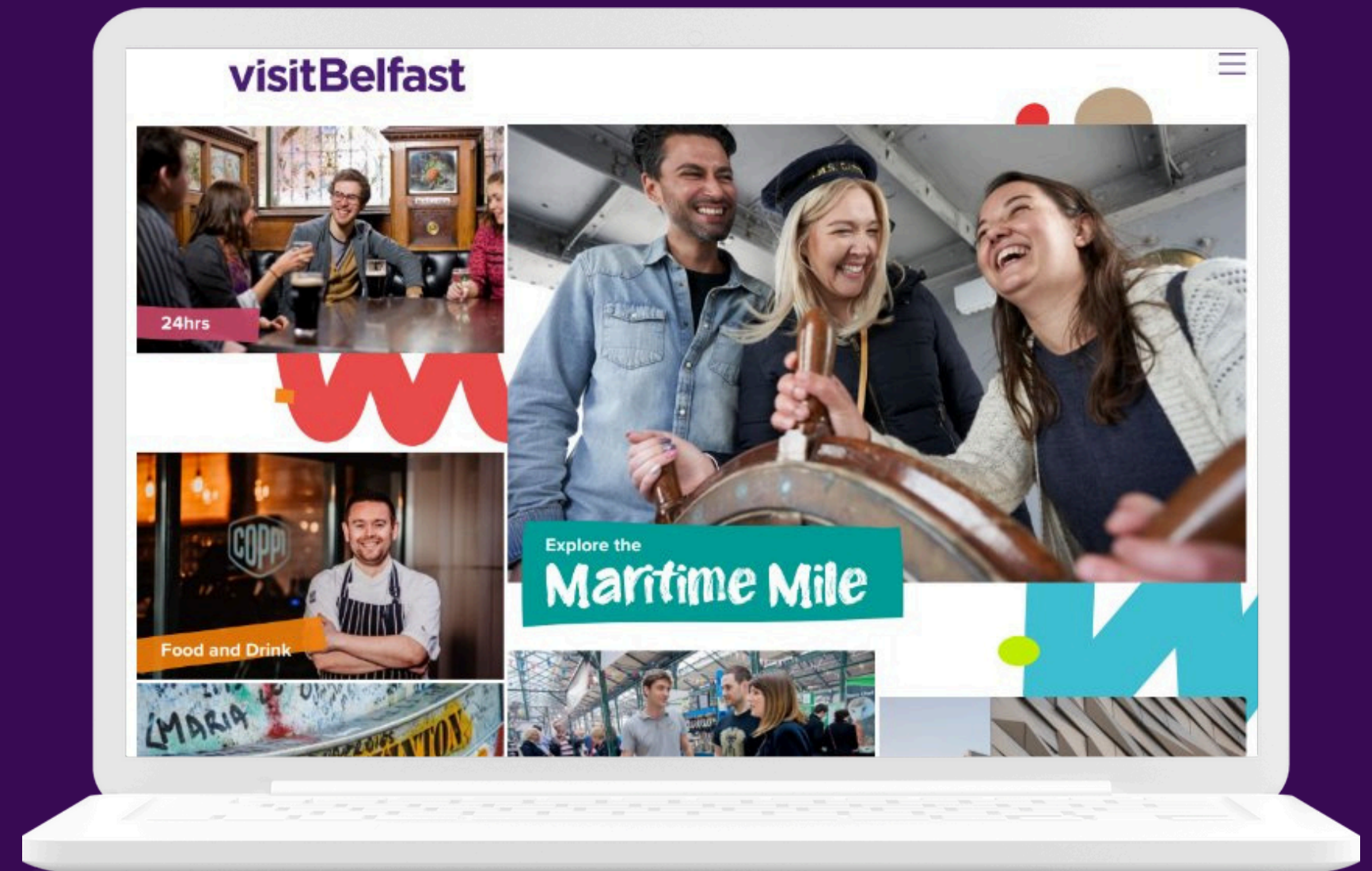
New Digital Partner Approach: Focused on enhancing partner opportunities with banner ad formats and sponsored sections while prioritising user experience.

Personalised Content: Tailored to key personas for improved engagement.

Social-First Approach: Leveraging CrowdRiff to highlight user-generated content across site and partner profiles

Enhanced Partner Profiles: New features like image feeds for better promotion across site

Smart Mapping Tool: Launching "You Smart Thing" to create tailored user maps.



A photograph of a person standing on a grassy cliff overlooking a city under a blue sky with clouds.

25-26 DELIVERY

VISITOR SERVICING & DESTINATION MANAGEMENT

An orange brushstroke underline.A series of horizontal lines in a light purple color.

visitBelfast

Targets & Outputs



805,000 visitor enquiries
4 VIC sites



£19m economic benefit

£878k
commercial
revenue

VIC satisfaction
levels 95%

Servicing
252k gateway
enquiries

Enhancing the
visitor experience

Delivering
economic / social
benefit
neighbourhoods

Stewardship
of visitor
experience

Cruise



320,328 cruise visitors



£23m economic benefit

- £90m investment by Belfast Harbour - Cruise Hub will relocate to D3 for 2027 /28
- Belfast is the number 1 transit port in the UK and Ireland
- Fastest growing travel segment in next 5 years
- Working with BH Harbour to grow 'turnaround' business - drives bednights and spend
- Deliver Year 3 of Cruise Sustainability plan
- Welcome team in place to maximise the visitor experience and create opportunities for local tourism businesses
- Gateway role
- Commercial opportunity to cover VB operating costs & encourage to "buy local"
- Cruise animation programme with partners, community groups and neighbourhoods

Neighbourhood Tourism

- 17,000 NEW referrals - 25-26 target
- 100 Neighbourhood tourism partners identified
- Three-year plan with cross company focus
- "Dial up" neighbourhood messaging in relevant VB activity
- Solid progress across all areas – early focus on East & West, further outreach North & South
- Mentor and support successful NT projects awarded under BCC NT Investment Fund
- City connectivity mapping using sustainable travel - Interactive digital mapping technology
- 25-26 improved measurement and tracking of referrals and impact at a product / experience level



Fleadh Cheoil na hÉireann

- Largest ever event held in Belfast
- Economic Impact Potential 700k visitors, delivering £60M economic impact
- VB key delivery partner for BCC - accommodation, visitor servicing and destination management, marketing and comms, industry engagement, ticketing, neighbourhood tourism, sustainability and impact
- 2-9 August 2026 and 1-8 August 2027
- Increase ROI and International visitors





25-26 DELIVERY

BUSINESS EVENTS



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Targets & Outputs

37,000 delegates
100,000 bednights

£37m* delegate spend
120 conference wins

+9% YoY
growth

£130m
Leads

£100m
Bids

2,000 buyer
engagements

20% increase
Corporate
RFPs

150 new
ambassadors

Destination
management
137 events

95% Clients
Recommend
Belfast

Outlook: Forward bookings (to date)

Year	Events	Dels	Bednights	Economic Impact
2024	133	31,394	77,766	£32,053,274
2025	106	38,113	114,762	£38,913,373
2026	22	10,426	33,227	£10,644,946
2027	15	10,250	33,990	£10,465,250
2028	2	1,608	5,027	£1,641,768
2029	1	600	1,500	£612,600
2031	2	1,400	4,700	£1,429,400
Total	281	93,791	270,972	£95,760,611

84% midweek events

2024 vs 2025
+22% economic impact
+48% bednights



25-26 DELIVERY

LEISURE TRADE



Targets & Approach

£2m leads value
20,000 bednights

8,000 daytrips
175 partner referrals

Development & demand

North America

China / Emerging Markets

Neighbourhood Tourism

Luxury & Premium

Key Issues

ETA

Affordability & Availability

Travel trade strategy

Partner Collaboration

2025-26 Summary

£141m

Economic impact

30:1

ROI

BCC investment:
Leverage - £1:£1.13
ROI - 68:1

Social
Environmental
Economic
Impact

VFM
Efficiency
Delivery

Thank you & Questions

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