

An aerial photograph of Belfast, Northern Ireland, showing the city's skyline, the River Liffey, and a bridge. The image is used as a background for the presentation slide.

visit Belfast

REBUILDING CITY TOURISM

Presentation to City Growth & Regeneration Committee
8 March 2023

Belfast Tourism: a Success story



+50%

Biggest increase in visitor economy in NI (2015-19)

52%

NI hotel sales are in Belfast

96%

of cruise visitors to NI arrive into Belfast

90%

Business events in NI are in Belfast

1/3rd

NI tourism jobs are in Belfast

Tourism now a key contributor to Belfast & NI economy

Visit Belfast Board

Reflecting city tourism - bringing insight, foresight and oversight

Kathryn Thomson	National Museums NI
Julia Corkey	ICC Belfast Ulster Hall
Judith Owens	TBL International
Rajesh Rana	Andras House Ltd
Caroline Young	Queen's University Belfast
Kevin Gamble	Féile an Phobail
Caroline Wilson	Taste & Tour NI
Uel Hoey	Belfast International Airport
Raymond Robinson	Presbyterian Church of Ireland
Petra Wolsey	The Beannchor Group

Peter Harbinson	Invest NI
Michael Robinson	Belfast Harbour
David Cowan	Translink
Chris Armstrong	Community Partnership
Marie-Thérèse McGivern	Maritime Belfast

Cllr Fred Cobain	Cllr Eric Hanvey
Cllr Paul McCusker	Cllr Séanna Walsh

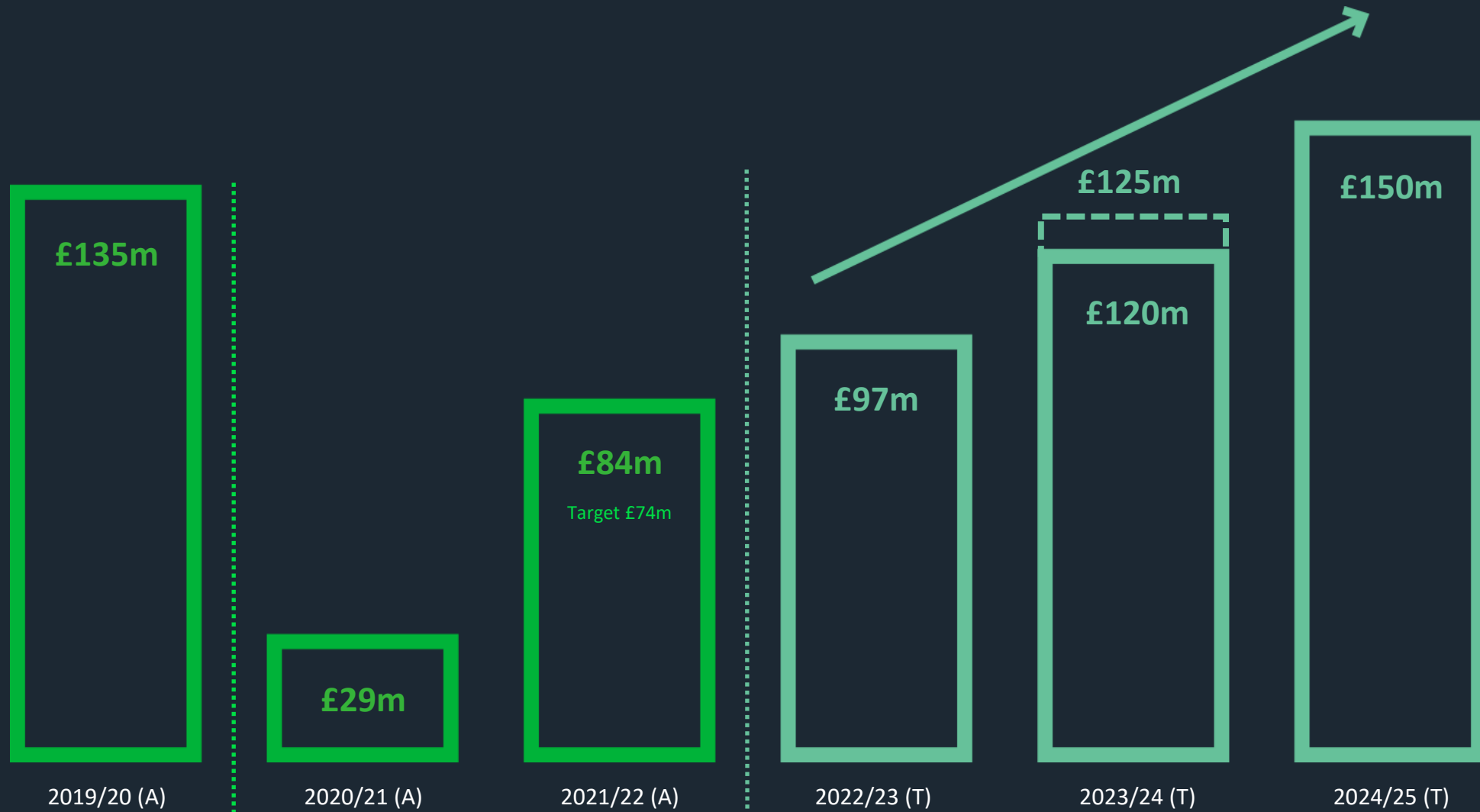
Observers:

John Greer, Belfast City Council
Kerry McMullan, Belfast City Council
John McGrillen, Tourism NI

Rethinking Tourism. DMO to DMMO



Visit Belfast: Rebuilding City Tourism



2022-23 Targets & Performance

Performance Targets

	2022-23 Target	Expected Outcome	Percentage Difference
Leisure Bed nights	150,000	342,375	228%
Leisure Day trips	100,000	245,127	245%
Conference Bed nights	82,000	68,000	82%
Cruise pax/crew	345,000	375,000	108%
Enquiries	516,000	570,000	110%

Visit Belfast Economic Impact Targets

	2022-23 Target	Expected Outcome	Percentage Difference
Leisure Tourism*	£30m	£50.22m*	167%
Business/Conference Tourism	£40m	£31m	78%
Cruise Tourism	£16m	£22m	138%
Visitor Servicing	£11m	£13m	118%
Visit Belfast's contribution to City Tourism Economy	£97m	£106.22m	110%
Budget	£3.6m	£3.7m	-
ROI	£1:27	£1:29	-

* Value includes day trip spend and bed night spend

Progress to Date

DMO to DMMO

Tourism is not the end goal it is a means to the end
Sustainability at the heart of everything we do

Top 10

sustainable destination

- 69% of city hotels Green Tourism certified

3rd

Highest performing DMO

Visitor management and welcome

100%

of our clients say they would
recommend holding an
event here

- Responsible messaging
- Conference content as important as heads-in-beds
- Changing the Menu. For Good launched

77%

were influenced to go on and visit
somewhere they hadn't planned to as a
result of their visit to the VIC



Progress to Date

Demand Generation

2m

hotel rooms sold
YTD



140m impacts

from tactical and responsive
campaigns (x10)



4.2m

web visits to
visitbelfast.com



52m

social media
impressions



113 conferences

welcoming 33,276 delegates
and generating £39.9m



98

conferences booked between
2023-29



£1m

enhanced conference support
scheme launched



737,000

enquiries handled



213

cruise calls



330,000

cruise visitors, generating £30m



Launched

NI Ambassador Circle
and
Integrated Business
Events Strategy for NI



£181m

economic impact



2023 Outlook

57 conferences

26,141 delegates
82,322 bed nights
£35.8m spend

170 cruise calls

362,000 pax & crew
£22m spend

Access

Increased access from
GB, Europe and North
America

STR hotel forecast

79.2% room occ
1.4m room sales

Market Share

VFR & Staycation market strong
Reconnecting & rediscovering:
increasing ROI and GB market share

Reasons to come

Strong programme of events &
Festivals inc. Maritime Festival,
One Young World, UNESCO City
of Music

Policy Framework



Challenges

From Covid... to a Cost of Living Crisis... reductions in disposable income



Global Economic Crisis



Rising
Consumer costs



Staffing and
Recruitment



Political
Uncertainty



Brexit
Implementation
ETA



Access and
Connectivity



Strikes and
Travel Disruption



Public Sector Finances



Tourism Not a
Priority sector



Hotel Capacity
at Peak Times



Rising Costs
of Doing Business



Cleanliness/
Anti-social Behaviour

Opportunities

25th anniversary of the
Good Friday Agreement



Titanic Belfast refresh



UNESCO City of Music



New Frankfurt service



Screen tourism



Ulster University relocation



Building to Belfast 2024



Legacy - One Young World,
Cyber UK, UK Space -
Positioning Belfast



Building on BRCD projects:
Belfast Stories, Royal
Hillsborough etc



Maximise cruise performance
– increased capacity / repeat
business



Key Market Opportunities

North America

NI

RoI

GB

Europe

Competitive VFM proposition in key city break markets of GB/RoI

Favourable exchange rates adds to value proposition in Europe & North America

Increasing air capacity: GB / Europe / North America

Reduction of APD (GB)

Visit Belfast Strategy 2023/24

Paradigm shift

Tourism is not the end goal, it is a means to a better city

Belfast uniquely placed

VFM proposition, access, growing markets & segments

VB Direction of travel

DMO to DMMO

Transition to selling and managing the destination for the benefit of its citizens

Sustain

Accelerate progress toward a regenerative tourism model

Grow

£150m annual economic impact by 2024

Position

Belfast brand, business and leisure website, gateway role

Enhance

Visitor servicing, hero local and community tourism initiatives, bleisure campaigns

Visitor Servicing Targets & Outputs



735,000 visitor enquiries



£16.5m visitor servicing
economic benefit

£22m cruise spend

- Enhancing the Visitor experience
- Destination management: stewardship visitor experience
- Gateway: delivering visitors across the region
- Drive spend into local business & communities
- Driving commercial revenue



Benefits:

- 77% do something additional
- 76% spend more
- 89% repeat or referral
- 86% very satisfied
- 32% Gateway enquiries



Driven by:

- Increased air & sea access
- 170 cruise calls
- 57 conferences/ 26k delegates
- Events
- Campaigns

Forward Booked Conferences

Year	Conferences	Delegates	Bed nights	Economic Impact
2023	57	26,141	82,322	£35,856,868.28
2024	26	15,008	40,839	£19,071,735.86
2025	8	4,105	13,166	£6,025,864.04
2026	5	4,661	15,198	£7,091,406.00
2028	1	800	3,000	£1,466,820
2029	1	1,300	5,200	£2,542,488
Total	98	52,015	159,725	£72,055,182.18

Business Tourism Targets & Impact

Sales & Marketing

£42m

Economic
Impact

86,000

Bednights

31,000

Delegates

£175m

Leads generated
10X & Key Sectors

£125m

Bids & Proposals

+35%

YoY Growth

New Website
Brand refresh
Content &
Positioning

Destination Management

150+ events

Supported with destination management
& marketing
Upsell, partner opportunities, bleisure &
re-marketing

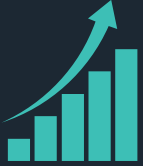
+90%

Recommend Belfast as an events
destination

2023 Strategic Events - Impact & Legacy



Opportunities, Issues & Interventions



Huge Demand But different...

- More events
- Less attendance
- Shorter-lead times



Rising event costs Challenge + Opty

- Soaring travel & event costs
- Cost per attendee +32%
- Currency, inflation, risk



Sustainability no longer nice to do

- 89% say its a priority
- Carbon cost & perception
- DEI, Social, CSR issues



Meeting with Purpose

- Strategic decision
- Greater focus on ROI
- Key sectors & impact

23-24 Strategic Interventions

1

Extreme collaboration & strategic research and bidding with key partners

2

Double-down on best prospect segments & markets - Top 50 / 200 prospects in each sector, market, segment

3

Diversify GB reliance. Ramp up activity in ROI, Europe, US in 22-23. Leverage VFM position

4

Ambassador Cicle Phase 2 - Diaspora, International, NI wide, sector review & recruitment

5

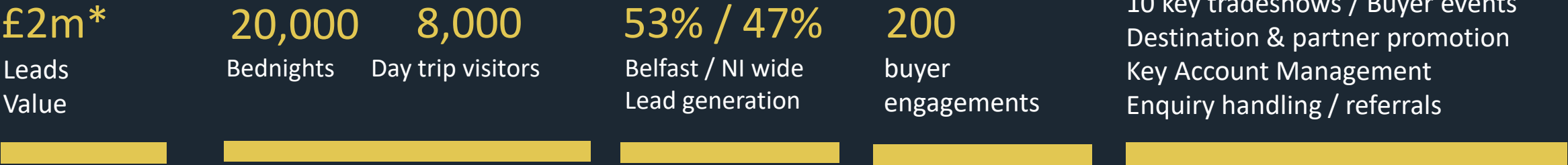
Brand refresh, new website, content development. Sustainability proposition

6

Tier 1 event - legacy and impact plans
Launch generic legacy programme (Sydney model)

Travel Trade Targets & Approach

Travel Trade - Demand Generation



Tiered Account Management

Gold	61
Silver	120
Bronze	657

Source Markets

- 1.GB
- 2. ROI
- 3. North America
- 4. Germany
- 5. Netherlands
- 6. Rest of Europe
- 7. Rest of World

2023 Highlights



Sustainability Impact & Interventions

Top 10

Sustainable
Destinations
Globally



90%

Hotel
Bedrooms
certified



85%

GDS Score
Top 5 DMO



Carbon
Impacted



Funds
Raised



Legacy
Impact



Industry
Clients
Visitors
Community
Impact &
Measurement



Strategic Interventions 2023-24

Carbon

- Visit Belfast - Carbon Measurement & Reduction Plan
- Baseline Belfast's carbon impact - tourism segment
- Business events - launch carbon measurement & reduction tool
- Delegates - launch online carbon reduction tool

Social Impact

- Changing the Menu for Good - Review, expand, promote and scale
- Fundraising
- Volunteering
- Dashboard & monitoring of impacts - clients, industry, VB, stakeholders & community
- DEI plan & diversity mark

Legacy

- Launch Visit Belfast legacy and impact programme - 5 key themes
- Tier 1 Business events - bespoke plans to be developed
- Monitoring, reporting and storytelling

Marketing & Communications Targets & Outputs

200,000 bed nights
150,000 day trips

£45m leisure tourism spend

2m
web visits

5m
video views

+10,000
new email
subscribers

150m PR
WOTS

23m
social media
impressions

400k
social media
followers

520 industry
partners

£900k
commercial
income

Marketing & Communications Strategy 2023-24

Restore city tourism to pre-pandemic levels

POSITION | GROW | SUSTAIN | EXPERIENCE

RESTORE

RECOVER

REIMAGINE

BRAND

Champion City Brand and EAGS, building brand equity, positioning Belfast as a cultural and business tourism destination.

A city that confounds expectations and rewards curiosity

CAMPAIGNS

Integrated, coordinated, seasonal and themed marketing, targeting best prospect markets.

UNESCO City of Music
Maritime, Food & Drink,
Festivals & Events, City Plus
& gateway.

WEB & DIGITAL

'Always-on' digital communications that engages audiences, accesses complex online journeys, motivating visits and fulfilment.

New websites, blog & podcasts, social media & email marketing.

PR & COMMS

Local, authentic content that inspires and promotes new experiences and distinguishes Belfast.

Engage with communities to amplify local experiences/stories.

Relationship building with target media and influencer activity.

Delivering integrated and timely city marketing

PRIORITY SEGMENTS

NI: Aspiring Families, Social Instagrammers & Natural Quality Seekers | ROI: Active Maximisers, Open Minded Explorers, Indulgent Relaxers | GB/International: Culturally Curious, Social Energisers

Republic of Ireland

Domestic NI

Great Britain

Europe

Destination Marketing Focus

Integrated marketing and communications activity, optimising consideration and destination making

Target Markets & Sectors

City Calendar

Stretch the season and fill in the gaps

Best prospect markets

European direct access (Paris, Milan & Frankfurt)

Staycations, VFR and Business+

New and repeat visits

City break and day trips

Key Touch Points & Themes

Tap into passion points and hidden gems

All new experiences

Say no – to normal

TV & Film set-jettlers

VFM / affordability

Iconic attractions

Become a cultural capital

Belfast 2024

Ultimate staycation

Content & Messages

Try something new

Urban adventure

City faces, City places

The beat of the city

Small city – Big heart

Homespun heroes

Love local

Imagine Belfast

Gateway and City Plus

Digital Upscaling

Transform digital marketing and social engagement strategy

Focus on user-generated content, social conversations and content partnerships

Support visitor services by streamlining and enhancing visitor information

Visual content development to support storytelling

Communications

Supporting sales, marketing & visitor servicing

Create standout and differentiation

Authentic travel, family and lifestyle influencers

Local heroes delivering key narratives and stories

Inclusive, sustainable & welcoming city

Stakeholder mapping and corporate positioning

Key Messages

- £125m Economic Impact
- Return on Investment 27:1

30% increase in output/impact

Increasing cost pressures met by commercialisation

- Belfast City Council leverages 1:0.88
- Return on Investment 1:62.5

- Bednights 286,000
- Daytrips 150,000

- Cruise Passengers 375,000
- Visitor Enquiries 735,000

Visit Belfast driving greater value for money and efficiency for Belfast City Council

Visit Belfast accelerating regenerative tourism model

**visit
Belfast**