

**Democratic Services Section
Legal and Civic Services Department
Belfast City Council
City Hall
Belfast
BT1 5GS**



Belfast
City Council

**REMOTE MEETING OF CITY GROWTH AND REGENERATION COMMITTEE
REPORT TO FOLLOW**

Dear Alderman/Councillor,

The above-named Committee will meet via Microsoft Teams on Wednesday, 3rd March, 2021 at 5.15 pm, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully,

SUZANNE WYLIE

Chief Executive

AGENDA:

3. **Presentations**

- (a) Visit Belfast (Pages 1 - 38)

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Subject:	Visit Belfast Presentation to Committee: 2021/22 Business Plan
Date:	3 March 2021
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Eimear Henry, Senior Manager, Culture and Tourism

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of the report is to present the request for funding from Visit Belfast for the 2021/22 financial year and to set out the organisation's strategic plan, focused on supporting tourism recovery. Members should note that Visit Belfast will be in attendance at the Committee to present the detail of its 2021/22 plan.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> - Note the draft Visit Belfast business plan 2021/22. The overall funding requirement for Visit Belfast in the coming financial year has been taken account of in the revenue estimates that have already been approved by the Council. - Approve the funding allocation of up to £1,997,465 for 2021/22 expenditure, subject to the development of a funding agreement confirming priority areas of activity as outlined in the presentation and agreed targets.
3.0	Main report
3.1	Members will be aware that Visit Belfast is the principal Destination Management and Marketing Organisation for the city of Belfast. Visit Belfast leads on the tourism marketing activities in Belfast. It is a membership organisation with more than 500 member businesses across the wider hospitality industry. Visit Belfast works, on behalf of its members, with a range of public and private partners such as the Belfast Chamber and the Business Improvement Districts (BIDs) to promote Belfast as a tourism destination.
3.2	Visit Belfast targets both the leisure and business tourism markets. It has a Memorandum of Understanding (MOU) with ICC Belfast to drive new business to the city. Before COVID-19 there had been significant growth and successes in this area with Belfast being recognised by the leading industry body as the Best Events Destination 2019.
3.3	Visit Belfast is a public/private partnership. Its current Chairperson is Kathryn Thomson, chief Executive of the National Museums of Northern Ireland. Belfast City Council has four Councillor representatives on the Board: Councillor Fred Cobain, Councillor Eric Hanvey, Councillor Paul McCusker and Councillor Séanna Walsh. Also represented on the board are members from the private, public and community sectors.
3.4	The tourism and hospitality industry in Belfast had been going from strength to strength as Belfast continued to drive the regional tourism economy; in 2019 (last published Local Government District tourism statistics by the Northern Ireland Statistics and Research Agency), Belfast hosted 1.9m trips accounting for one third of all tourism trips to Northern Ireland and tourism spend amounted to £417m, 40% of Northern Ireland tourism spend.
3.5	In advance of COVID-19 the trajectory had been positive with forecasts suggesting that the sector would account for around 15% of new jobs in the decade. This was further reinforced by the inclusion of tourism as a key growth sector in the City Deal. This acknowledged the fact that the sector was already a significant economic generator but recognised the need

	<p>for significant additional investment in order to sustain growth. The council's Cultural Strategy "A City Imagining" also identified the importance of growing the city's sustainable cultural tourism offer through a creative approach that respects the city's heritage and communities.</p>
3.6	<p>The ambitions for tourism have had to be reconsidered in the context of COVID-19, however the Council's proposed ten year plan and emerging themes sets out the recovery potential. A report by EY on the Contribution of Belfast to NI's Tourism Development (December 2020) looked at how Belfast is heavily affected by COVID-19 but has the opportunity to re-emerge as an inclusive, authentic and vibrant tourism destination, building international appeal whilst benefitting locals and the rest of NI. The recovery potential of Belfast as a tourism destination and economic driver is considered strong. Belfast is considered to be still a relatively new city break destination with strong assets for a second tier European city. The report recommended that Belfast should keep investing in tourism in order to answer fast-evolving market expectations and foster its authenticity and vibrancy. In particular the report identified the potential for Belfast to become a global standard setter, for the development of an inclusive tourism model.</p>
3.7	<p>It is in this context that Visit Belfast has set out a 3 year recovery strategy, <i>Rebuilding City Tourism</i>, supported by a one year operational plan. Further details of activities that will be undertaken as part of this plan with associated targets will be set out in the presentation to the Committee and are included at Appendix A.</p>
3.8	<p><u>Rebuilding City Tourism</u></p> <p>Generating £417m tourism spend and supporting 10% of city jobs in 2019, Belfast's tourism growth and development have seen the city's tourism industry crucially emerge both as a key pillar of the city economy, and also of strategic importance to the wider visitor economy of Northern Ireland. As the regional driver for the Northern Ireland visitor economy, the Belfast City Region will play a significant and important part in any regional recovery plans.</p>
3.9	<p><i>Tourism Outlook</i></p> <p>Despite the outlook being far from certain, tourism can contribute to the economic and social wellbeing of the city with high potential to create jobs quickly and provide the economic impetus for a wider economic recovery. Countries that were able to effectively control the spread of the virus saw a rapid recovery of both leisure and business travel, initially domestic but with additional measures, leading to the reopening of international travel.</p>

3.10	While it remains unclear what the longstanding or permanent changes Covid-19 will cause the global tourism sector, growth is still expected in the medium term. The UNWTO (World Tourism Organisation) expects to see international arrivals begin to recover by the second half of 2021 estimating a return to 2019 levels within two to four years. Whilst 'not guaranteed', HSBC Global Research concurs with this outlook. Furthermore, Belfast's focus on Great Britain and Republic of Ireland markets helps support the short to medium to longer term recovery and growth projections.
3.11	Even before Covid-19, consumers and policy makers were starting to take a more critical look at tourism and its potential impacts. The pandemic has brought greater scrutiny on ensuring tourism recovery is not only economically sustainable but there needs to be a greater emphasis on environmental and socio-cultural sustainability. Developing a regenerative model needs to be at the heart of the tourism sector and mainstream across tourism businesses, organisations and policy makers.
3.12	The enforced pause on tourism operations, has provided the sector with the opportunity to align itself with city and regional plans aimed at not only economic recovery but longer term socio-cultural needs and climate action that in turn help improve the competitive positioning of Belfast in the international market place.
3.13	In tandem with city tourism development plans, Visit Belfast is proposing to adopt new and innovative approaches to its destination sales, marketing and communications and visitor servicing. This will be achieved by utilising the City's core values and place branding to reposition itself, promoting authentic Belfast experiences to enhance competitiveness in order to deliver growth that will benefit residents, businesses and visitors equally.
3.14	While the full impact of Covid-19 is as yet unknown, what is clear is that any city and regional recovery will need new and innovative approaches in an increasing complex set of market conditions.
3.15	<p>Visit Belfast has considered their own strategic and operation plans in the context of the Council's emerging tourism priorities:</p> <ul style="list-style-type: none"> - Growing Belfast: the City's role in tourism recovery and potential requirements for future growth.

	<ul style="list-style-type: none"> - Experiencing Belfast: an interpretative development framework for tourism that will provide an optimal mix of anchor and ancillary products, immersive activity and inspirational experiences. - Positioning Belfast: Brand positioning and architecture, and organisational delivery roles and responsibilities. - Sustaining Belfast: Global Destination Sustainability Index and benchmarking, development of a collaborative action plan to improve the sustainability performance and enabling Belfast to become a more sustainable place to visit, meet and live in.
3.16	<p>Informed by this policy context, Visit Belfast is seeking to re-purpose and re-structure its operations and activities to adapt to the changing environment and operating context. These activities aim to maximise efficiencies and prioritisation of resources to facilitate an appropriate and rapid response to dynamic market, customer and operating challenges, including:</p> <ul style="list-style-type: none"> - Shape of the industry post Covid-19 - Brexit - Restoring air/sea access and connectivity - Changing consumer values/ consumption - Responsible and sustainable tourism - Safety, health and hygiene - Consumer confidence and community consent - Digitalisation - City and regional spread
3.17	<p>Covid-19 has presented a unique opportunity to innovate and adjust, and in doing so:</p> <ul style="list-style-type: none"> - Build a resilient tourism economy - Stay ahead of the digital curve - Support the low carbon transition - Deliver value for communities - Re-imagine future of city tourism
3.18	<p>Priorities for Visit Belfast's business plan include:</p> <ul style="list-style-type: none"> - Expand the city's tourism offer and stimulating consumer confidence in the urban area - Utilise the strength of the city brand and its equity to promote unique Belfast experiences

	<ul style="list-style-type: none"> - Re-start and sustain domestic tourism while supporting the safe return of international tourism - Support tourism businesses, protecting jobs and contributing to economic recovery - Achieve tourism growth from high value markets in a sustainable and inclusive way - Support the Belfast Cultural Strategy as part of the development plans for tourism - Promote and stimulate stronger, fairer and more sustainable eco practices - Engage with local communities and amplify local experiences & stories - Utilise and invest in digital technology and communications to increase competitiveness - Commit to longer term initiatives including signature events, 2023 International Year of Culture and UNESCO City of Music 														
3.19	<p><u>Operational Targets for 2021-22</u></p> <p>In 2021-22 Visit Belfast's core objective continues to be driving the visitor economy through securing trips to the city and visitor spend. This will be achieved through the ongoing delivery of main service areas:</p> <ul style="list-style-type: none"> - Marketing, Communications, Partnership and Commercial - Business Development - Visitor Servicing 														
3.20	<p>Visit Belfast has set out a number of targets to be included as part of any funding agreement. These targets have been drawn up in the context of ongoing uncertainty and plans for recovery.</p> <table border="1"> <thead> <tr> <th>VISIT BELFAST: TOTAL OUTPUTS</th><th>2021-22 Target</th></tr> </thead> <tbody> <tr> <td>Leisure Tourism Bed nights</td><td>90,000 bed nights</td></tr> <tr> <td>Leisure Tourism Day trips</td><td>100,000 day trips</td></tr> <tr> <td>Business Tourism Bed nights</td><td>60,000 bed nights</td></tr> <tr> <td>Cruise Visitors</td><td>338,800 pax & crew</td></tr> <tr> <td>Visitor Enquiries</td><td>450,000 enquiries</td></tr> <tr> <td>Visit Belfast Projected Economic Impact</td><td>£74m</td></tr> </tbody> </table>	VISIT BELFAST: TOTAL OUTPUTS	2021-22 Target	Leisure Tourism Bed nights	90,000 bed nights	Leisure Tourism Day trips	100,000 day trips	Business Tourism Bed nights	60,000 bed nights	Cruise Visitors	338,800 pax & crew	Visitor Enquiries	450,000 enquiries	Visit Belfast Projected Economic Impact	£74m
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	Visit Belfast Economic Impact	£74m	
	Budget	£3.3m	
	ROI	£1:23	
3.22	In addition to these economic targets, Visit Belfast are also proposing to incorporate a new range of socio-cultural and environmental targets as outlined below.		
3.23	<p><i>Visit Belfast Change Projects – 2021-22 Outcomes</i></p> <ul style="list-style-type: none"> - Visit Belfast to become a Green Tourism certified DMO by year end - Green Tourism Partnership Scheme – 50% industry sign up - 30% of Visit Belfast won business events in 2022 will have a sustainability plan - 30% of Visit Belfast won business events in 2022 will have an impact/legacy plan - Improve Belfast's GDSI score in order to achieve improved ranking - Launch the Copenhagen Legacy Lab model for business events - Launch new conference support scheme in partnership with BCC/Tourism NI - Launch next generation ambassador programme in partnership with Invest NI 		
3.24	Public Sector funding is expected to account for 76% of overall funding in 2021-22, reducing to 67% in 2022-23 and 62% by 2023-24 as commercial income increases towards the levels seen in 2019-20.		
3.25	<p><u>Financial & Resource Implications</u></p> <p>In the current financial year, Belfast City Council's funding arrangement with Visit Belfast is £1,997,465. An allocation of £1,997,465 has been set aside within the Departmental estimates for the financial year 2021/22.</p>		
3.26	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>No specific equality or good relations implications. Visit Belfast also works with Councils outside of Belfast, as part of the Regional Tourism Partnership.</p>		
4.0	Appendices		
4.1	Appendix A: Visit Belfast Presentation		

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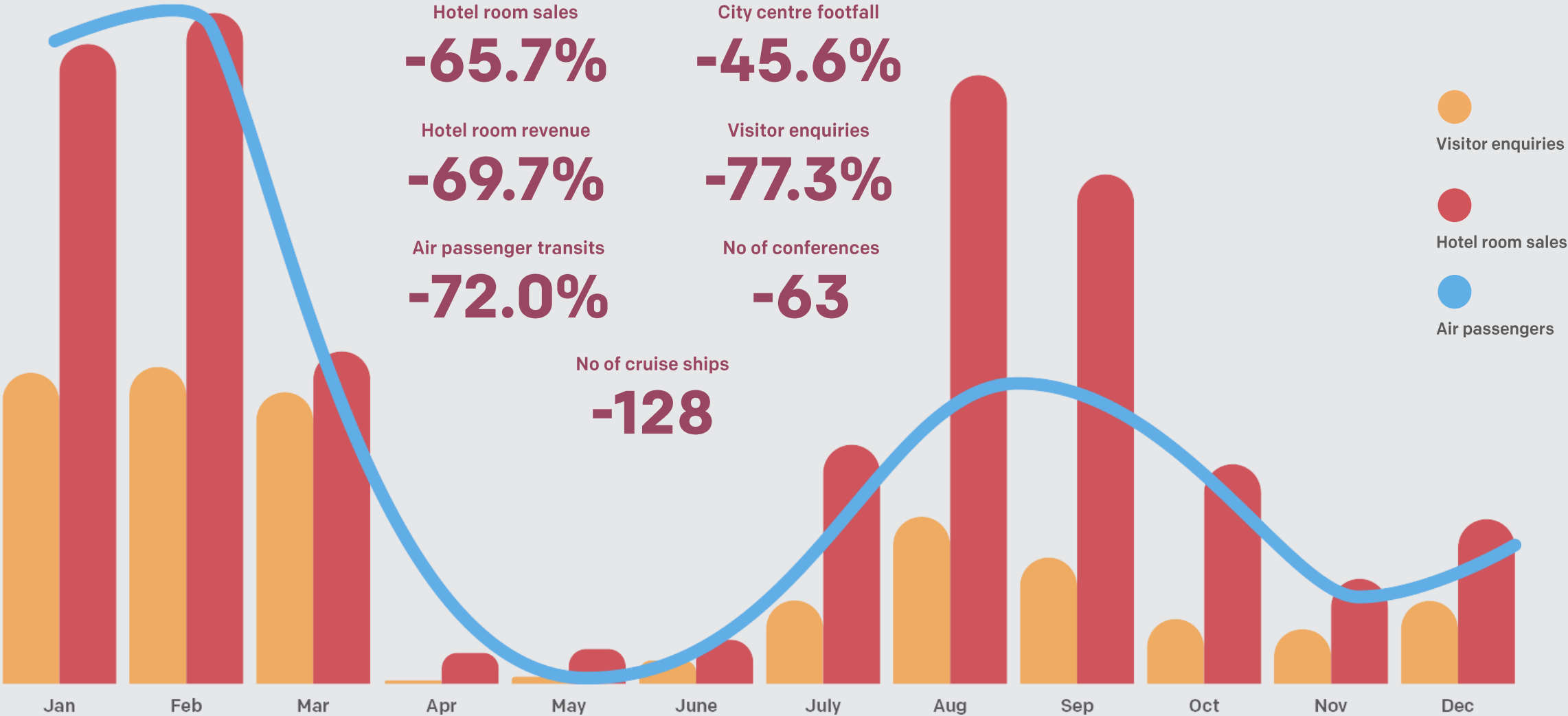


visit Belfast

REBUILDING CITY TOURISM 2021-24

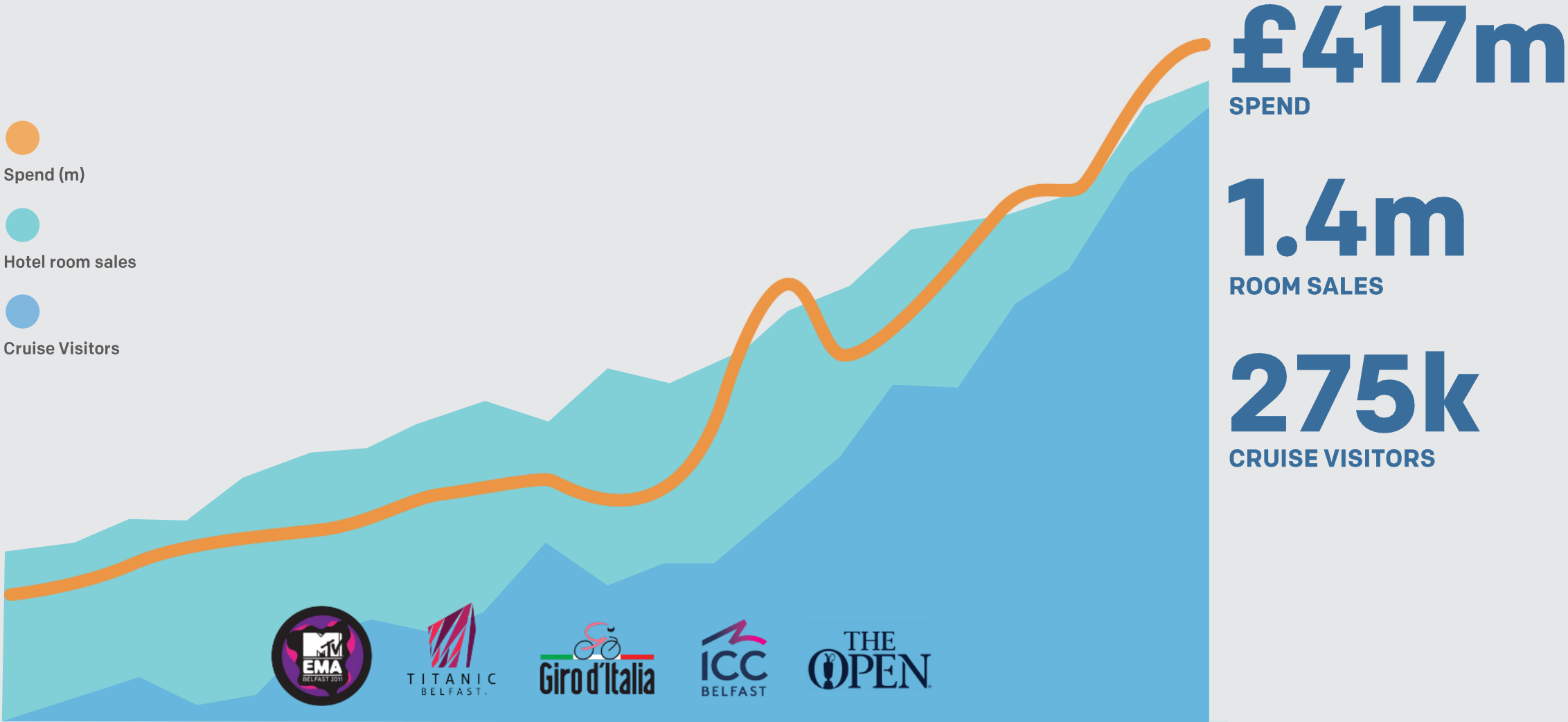
COVID-19: A HAMMER BLOW TO CITY TOURISM

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20 YEARS OF CITY TOURISM GROWTH

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TOURISM IS A PILLAR OF THE CITY ECONOMY

1999

£79.4m

SPEND

4,213

JOBS

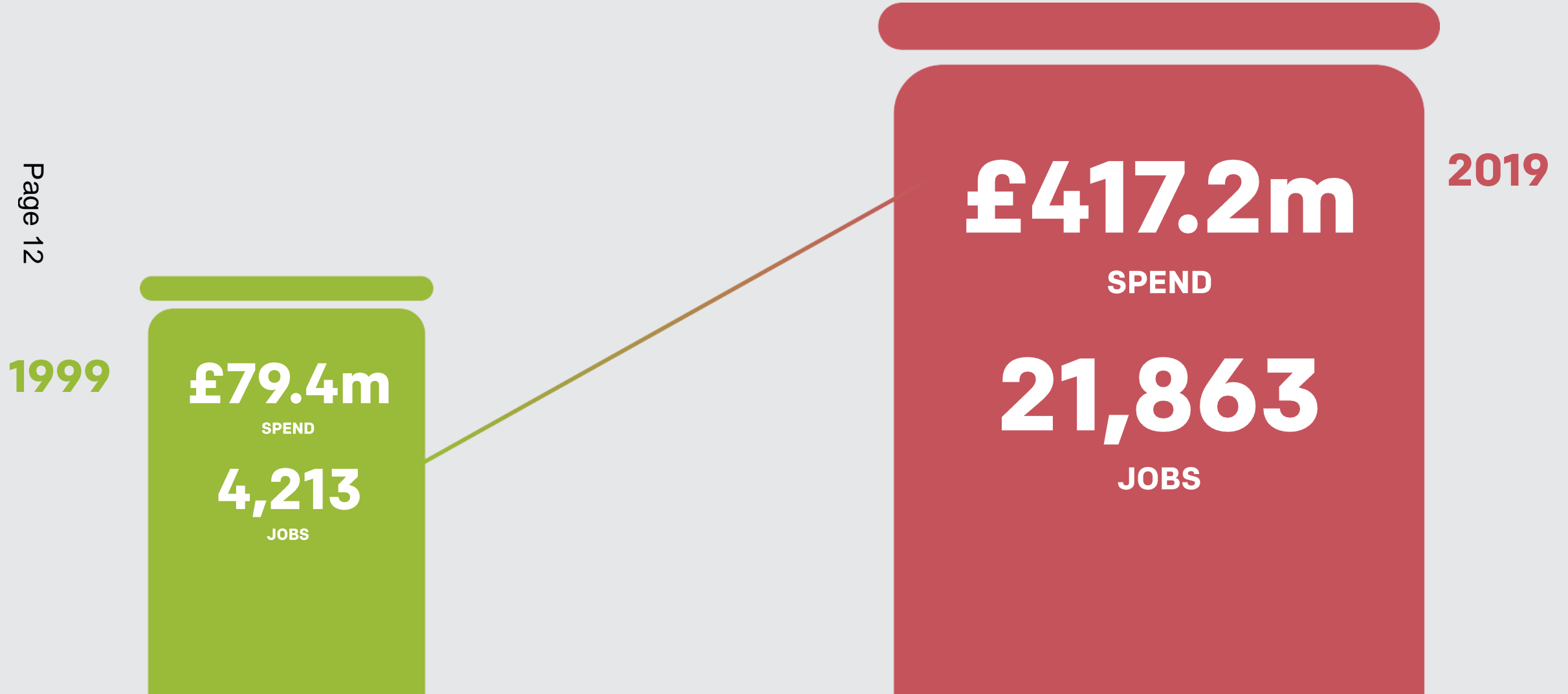
2019

£417.2m

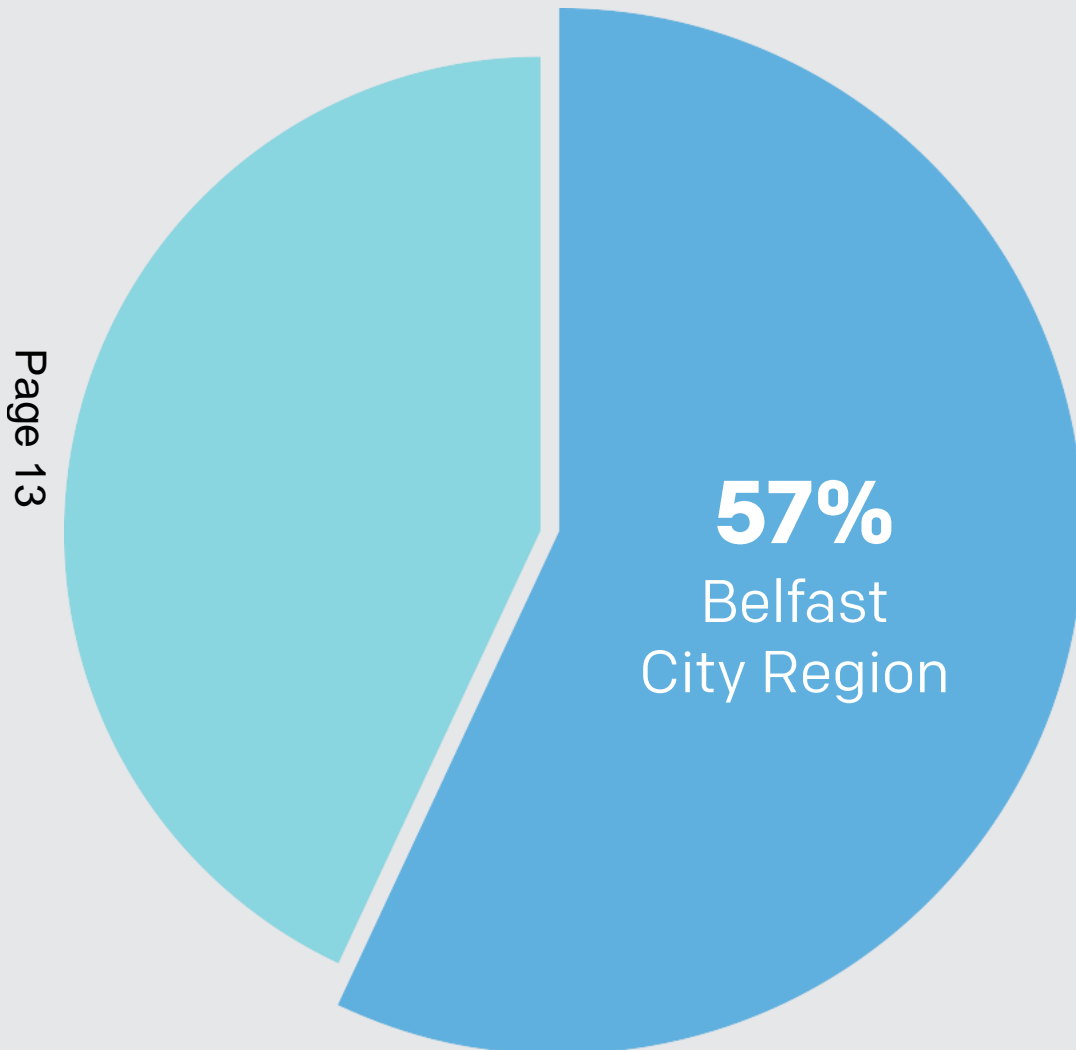
SPEND

21,863

JOBS



BELFAST CITY REGION'S STRATEGIC IMPORTANCE



+69% O/n tourism spend in 5 years

56% of OoS tourism spend generated by BCR

45% of NI tourism jobs are in the BCR

84% tourism spend in Belfast is from OoS visitors

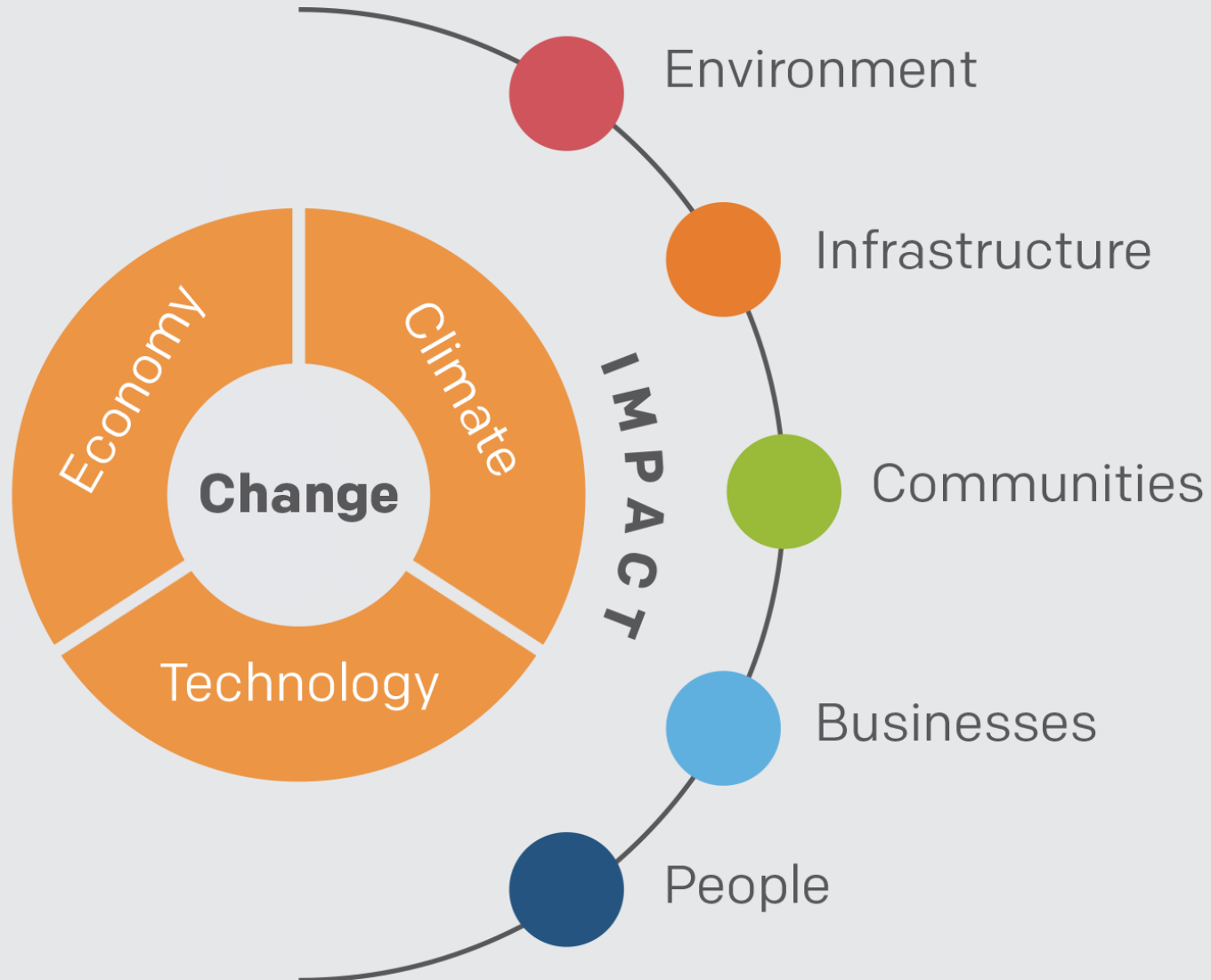
50% NI hotel room stock is in Belfast

+59% Belfast accommodation bed stock since 2013

90% business events in NI are in Belfast

95% of cruise visitors to NI arrive into Belfast

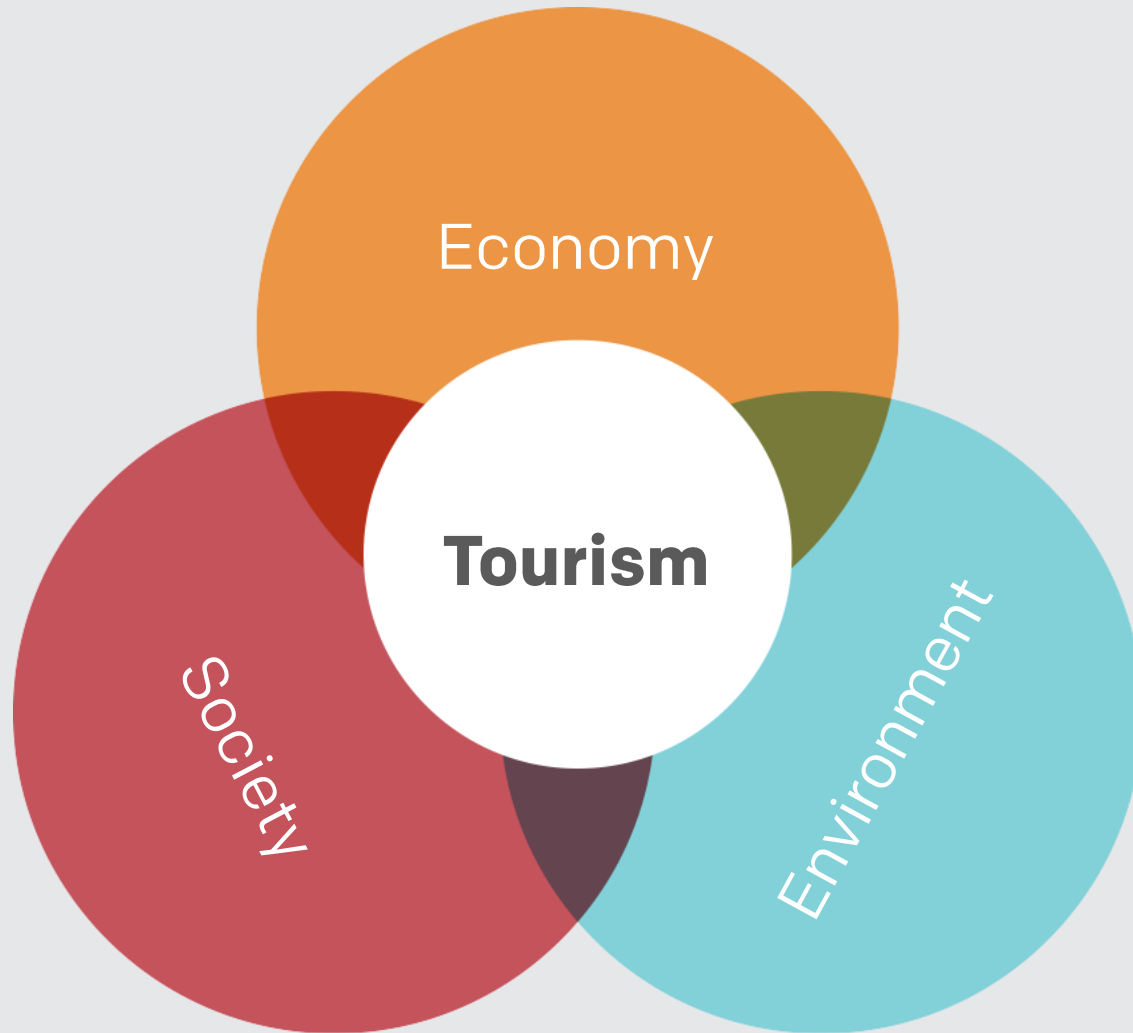
THE NEW PARADIGM



Need to balance:

- Economy
- Society
- Environment

NEW REGENERATIVE MODEL FOR TOURISM



Tourism can be a force for
good and central to:

Building

a resilient economy

Delivering

Inclusive growth

Protecting

the environment

VISIT BELFAST: NEXT GENERATION DMO

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Advocacy

**Environment/
Societal KPIs**

Safeguard

city tourism and support local industry

Deliver

destination cohesion and drive out duplication

Demand generation

build demand, generate bookings and welcome back visitors

VISIT BELFAST

GUIDING PRINCIPLES & OBJECTIVES

Guiding Principles

- Environmental sustainability
- Inclusive growth
- Partnership/collaboration
- Flexible/adaptable
- Visitor/citizen focussed

Objectives

Drive

overnight trips, day visits and spend

Encourage

repeat visits and increase visitor satisfaction

Spread

the benefits of tourism across the region

Champion

the Belfast destination brand

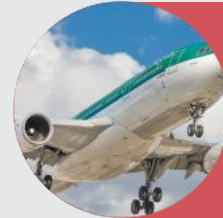
OPERATING CHALLENGES



Shape of the industry
post COVID-19



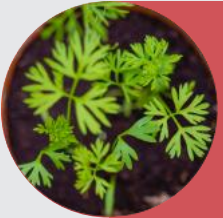
Brexit



Restoring air/sea access
and connectivity



Changing consumer
values/consumption



Responsible and
sustainable tourism



Safety, health
and hygiene



Consumer confidence
and community consent



Digitalisation



City and regional
spread

POLICY FRAMEWORK



CITY TOURISM POST COVID-19

Changing Visitor Behaviour & Preferences

- Socially and environmentally conscious traveller
- Health and wellbeing
- Love local

Dial Up/ Refocus

- Compact city: walking, cycling, public transport
- Near markets are our main markets (GB, ROI)
- Familiar yet young and fresh tourism product
- Emerging neighbourhood tourism
- Access to green/open spaces
- Local talent: music, food and creative arts and culture
- Innovative digitalisation: providing seamless travel

Visit Belfast Marketing & Sales

- Champion responsible tourism
- Promote neighbourhood tourism
- Amplify the city's emerging culture and arts sector
- Focus on NI, ROI & GB and repeat visitors
- Accelerate the safe return of conference and cruise tourism
- Supporting the return of international tourism
- Embracing new technologies

NEW INITIATIVES BUILDING BACK BETTER

Responsible Tourism

Measuring environmental, community and social impact KPIs

- Develop Global Destination Sustainability action plan with BCC
- Aim for Belfast to be a GDS certified destination by 2025
- VB third-party certified DMO by 2022

Love Local

- Develop new neighbourhood and cultural tourism clusters
- Roll out new partnership scheme

Health & Wellbeing

- Positioning Belfast as a safe, welcoming city
- Providing visitor and community assurance

Demand Generation

- Flexible conference support and corporate schemes
- Next generation' ambassador programme

Acceleration of Digitalisation

- Enhance path-to purchase and visitor journey, real time personalised information and automation

MARKETING COMMUNICATIONS

90,000

BED NIGHTS

100,000

DAY TRIPS

£20m

VISITOR SPEND

TOUCH POINTS AND THEMES



Reimagine Belfast –
culture, art & music



Iconic Waterfront –
maritime and history



Belfast City Region
experiences

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Food and Drink – restaurants,
markets and locally sourced



Events, festivals
and sport



LGBTQI+



Homespun –
people and stories



Outdoors, green
spaces and nature



Health and Wellness –
luxury and spa experiences

PRIORITY MARKETS & SEGMENTS

NI/RoI
RESTART

GB
REBUILD

International
REIMAGINE

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Visiting family & friends

Culturally curious

Families

Repeat visitors

Millennials

SCENARIO PLANNING

Scenario 1 FULL LOCKDOWN	Scenario 2 LOCKDOWN RESTRICTIONS PARTIALLY LIFTED	Scenario 3 LOCKDOWN RESTRICTIONS SIGNIFICANTLY EASED NI regional travel to Belfast allowed	Scenario 4 UK AND TRAVEL FROM CCE ALLOWED (but international borders closed)	Scenario 5 UNRESTRICTED TRAVEL WITH SAFETY PROTOCOLS AND MEASURES
Dream Now & Travel Later / Stay at Home & Stay Safe Inspirational/PHA messaging, at home activities, content, puzzles, jigsaws and competitions, keeping brand alive and destination awareness				
	Shop local, Support Local, Welcome Back Belfast / We're Ready, Are You? Reactive and selective marketing & comms supporting reopened businesses safely, agile digital only marketing and day trip focus supporting PHA guidance. Welcome back messages, offers/updates			
		Home-Aways in Belfast / Our City's Your City / Belfast in Blooming High intensity, close to normal marketing, bolster campaign activity and seasonal destination marketing driving demand - day & overnight trips. Upbeat messaging, reassuring/ inspirational, confidence building: providing reasons to visit Belfast		
			Uniquely Belfast, Only in Belfast / Belfast is Home / Wish you Were Here New video and content. Intensified & heavyweight Destination Belfast creative integrated tactical campaign approach to drive bookings: GB focus and IOI for staycations/repeat visits. Partnering industry, TI & TNI to integrate/maximise results	
				Building Back Better: Our City, Your Planet / Greening Belfast/ Better in Belfast Position Belfast as a Future City. Rebuilding Belfast profile as a leisure/ business destination, promotion that stimulates demand, achieves growth & builds back business

visit
Belfast

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BUSINESS DEVELOPMENT

60,000
BED NIGHTS

£30m
ECONOMIC BENEFIT

BUSINESS TOURISM KEY PRIORITIES

Building back

doubling conference sales performance

Target

aggressively the GB market and re-focus on ROI market

Ramp-up

sales and marketing activity across the board

Refresh

the Belfast proposition to ensure it is compelling in new market context

Support

city recovery at local level – meet out to help out initiative in partnership with industry (local corporate business)

Retain

as much of the £92m forward booked business for city

TRAVEL TRADE PRIORITIES

Ramp up

sales and marketing activity across the board
and maximise opportunity through virtual platforms

Site & Fam visits

programmes including industry planning days with
Gold operators

New itinerary development

to meet new demands of operators and consumer
preferences

visit
Belfast

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VISITOR SERVICING

450,000

ENQUIRIES

£9m

ECONOMIC BENEFIT

VISITOR SERVICING

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Rebuilding business and tourism recovery

- Driver for repeat visits
- Extending visitor stay and spend
- Providing reassurance



Digitalisation

- Enhancing technology-led visitor information services/experiences
- City/Destination Pass
- Online gift shop



Cruise

- Visitor flow, capacity management and safeguarding
- Visitor information and welcome



KEY METRICS

BED NIGHTS

DAY TRIPS

**CRUISE
VISITORS**

**CONFERENCE
DELEGATES**

**VISITOR
ENQUIRIES**

**ENVIRONMENTAL
IMPACT**

SOCIETAL IMPACT

KEY OUTCOMES

150,000 BED NIGHTS

100,000 DAY TRIPS

**338,000
CRUISE PAX/CREW**

**21,000 CONFERENCE
DELEGATES**

**450,000 VISITOR
ENQUIRIES**

**£74m
ECONOMIC IMPACT**

**ROI
£1:23**

VISIT BELFAST CHANGE PROJECT OUTCOMES

- Visit Belfast to become a Green Tourism certified DMO by year 2022
- Green Tourism Partnership Scheme: 50% industry sign up
- 30% of Visit Belfast won business events will have a sustainability plan
- 30% of Visit Belfast won business events will have an impact/legacy plan
- Improve Belfast's GDSI score in order to achieve improved ranking
- Launch the Copenhagen Legacy Lab model for business events
- Launch new conference support scheme in partnership with BCC/TNI
- Launch next generation ambassador programme in partnership with Invest NI
- VBWC technology upgrade
- Implement Visit Belfast IT infrastructure review
- Complete organisational realignment

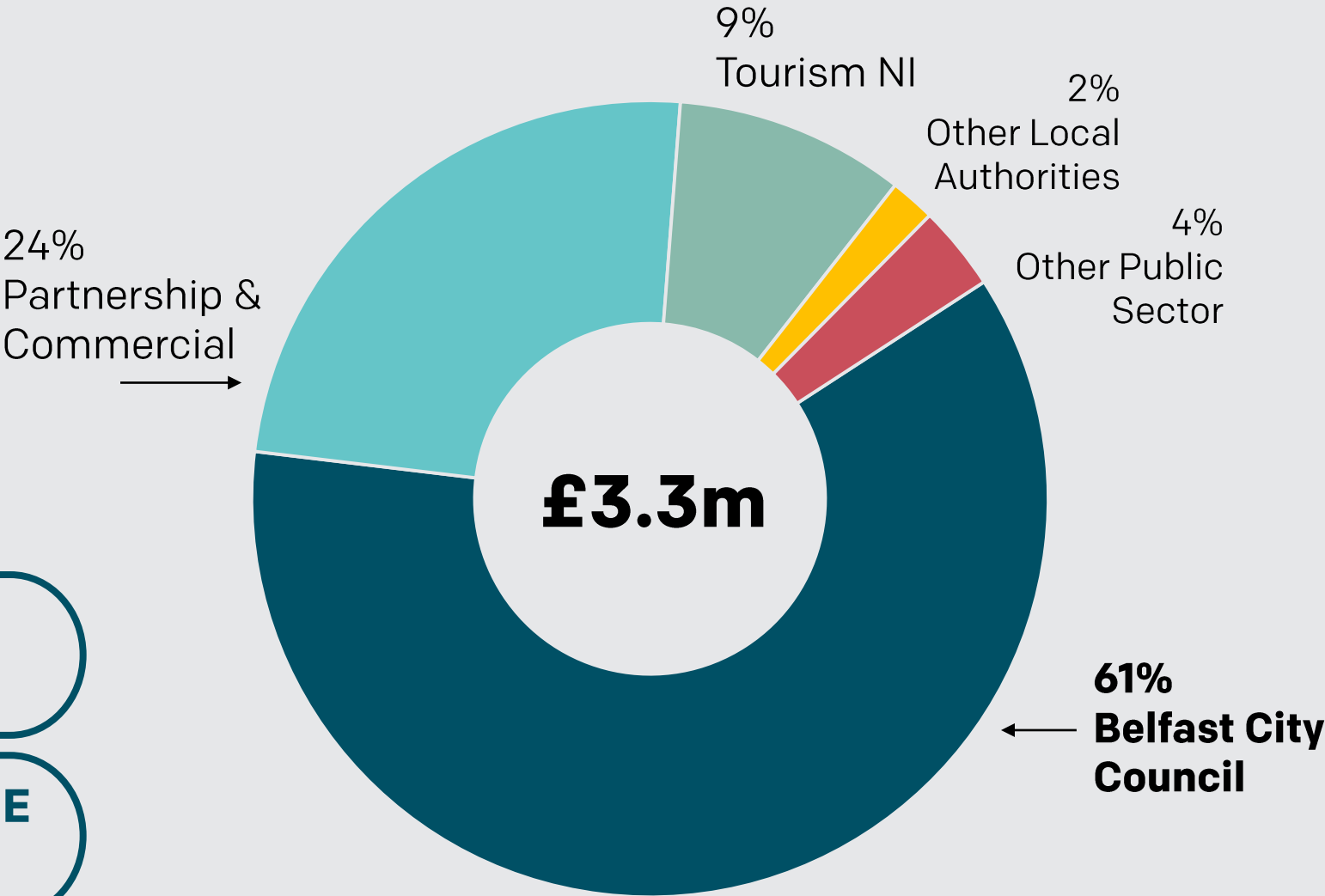
INCOME & EXPENDITURE 2021-22

INCOME	2021-22
Public Sector	
Belfast City Council	1,997,465
Tourism NI*	305,500
Other Public Sector	112,500
Other Local Authority	60,000
Total Public Sector	2,475,465
Partnership & Commercial	795,458
TOTAL INCOME	3,270,923

EXPENDITURE	2021-22
Marketing & Sales	2,321,648
Visitor Servicing	597,468
Overheads & Admin	602,302
TOTAL INCOME	3,521,419
Use of reserves	250,496

* TNI funding reviewed annually (2021-22 TBC)

OPERATING BUDGET

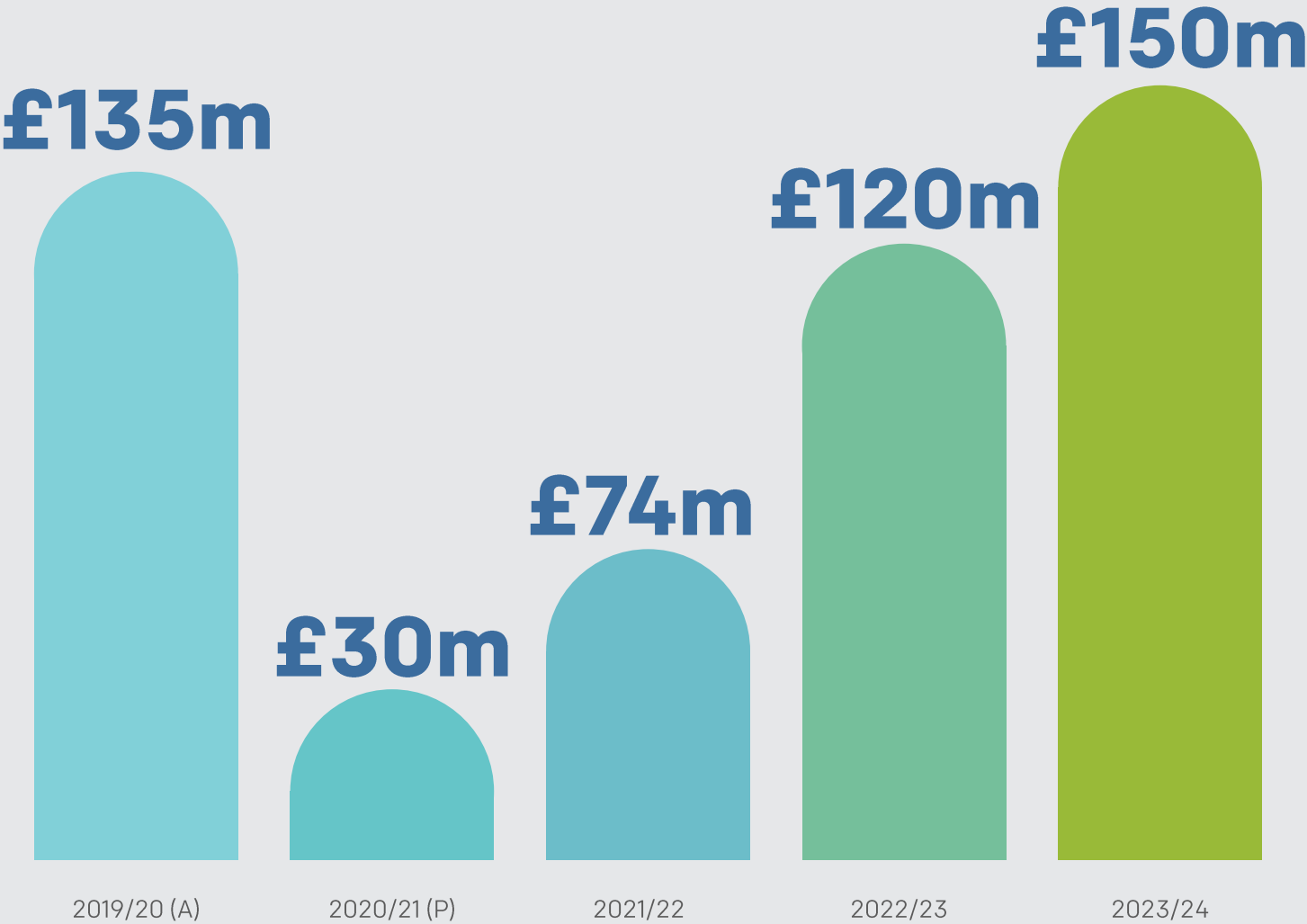


BCC ROI
£1:37

BCC LEVERAGE
£1:0.40

3 YEAR RECOVERY STRATEGY

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DRIVING
£344m
to the local economy

KEY MESSAGES

Belfast is critical to NI economic recovery

Tourism can be a force for good: economy, society and environment

Belfast City Region tourism/cultural assets mean we are well placed for recovery

These plans set out a new direction of travel and will ensure Belfast is market and operationally ready

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