

2024-2027 Visit Belfast Strategy

New Horizons for Belfast City Region

Year 3 Business Plan 2026-27

Belfast City Council CG&R Committee

**visit
Belfast**





Strategy: Key Pillars aligned to BCC Strategy

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

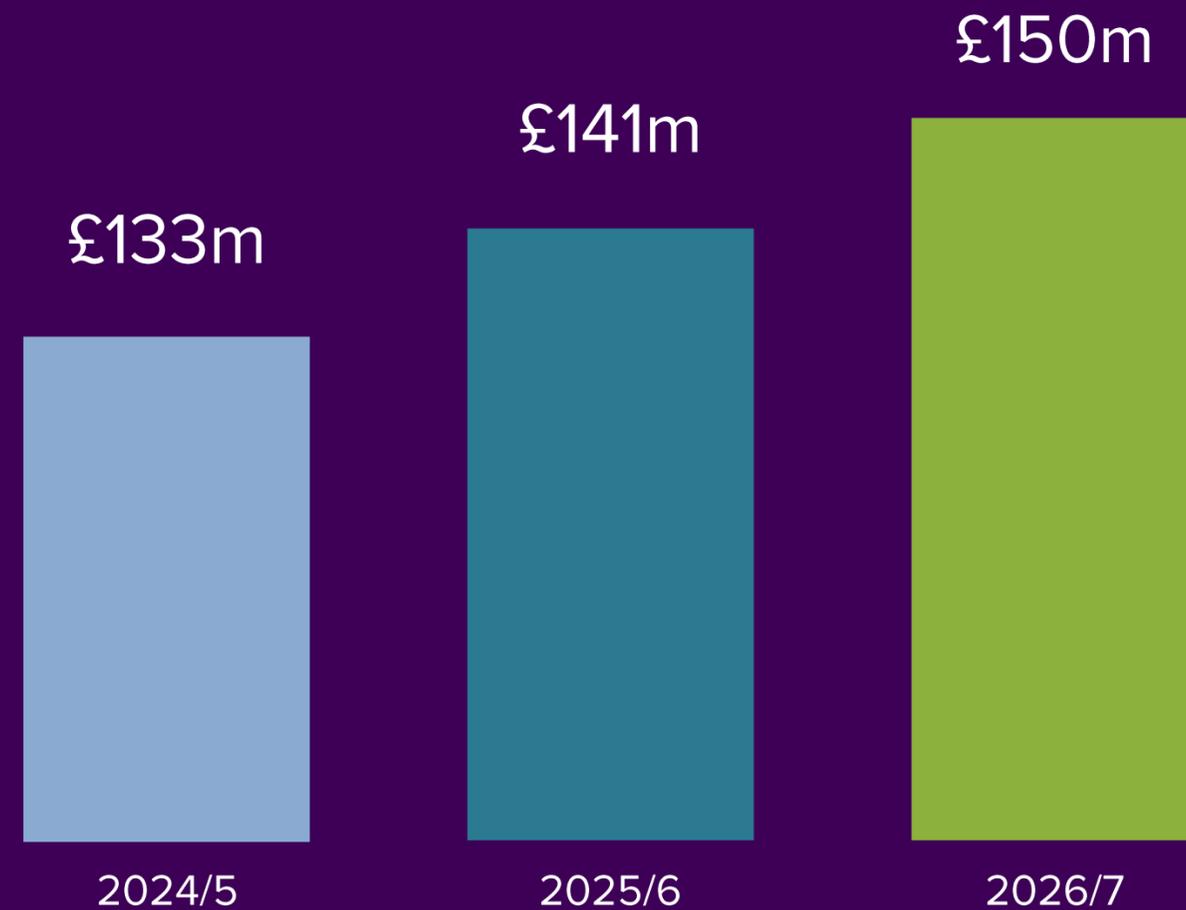
Enhance the visitor experience by showcasing Belfast City region's unique neighbourhood offer

SUSTAIN

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

3-Year Strategy Objectives

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



**Social &
Environmental**

**Grow commercial
income**

**Digital
Innovation**

Performance Year 1 & 2

£319m Economic impact

75% of three-year target

110% 3-year impact projected - £469m

Social & Environmental impact

92% resident support for tourism

Belfast - Top 10 sustainable destination globally

Carbon model developed for tourism & tracked annually

Innovation

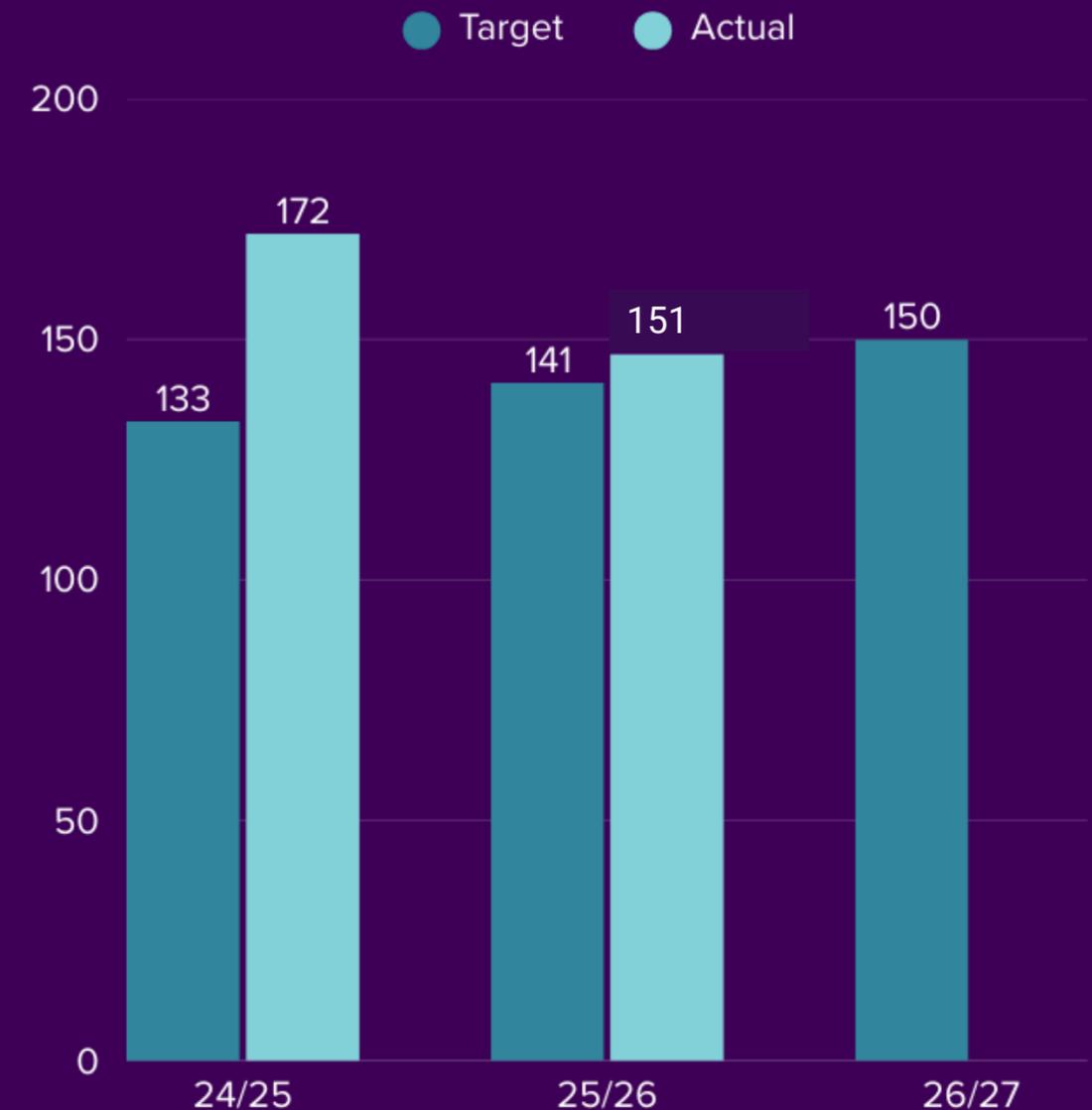
UK's first 'social-first' destination website - 3M visits

Fastest growing social tourism brand – UK & Ireland

Record-breaking 46M video views - innovative AI and CGI use

Next generation accessibility and sustainability tools

(Recite Me, You.Smart.Thing and Bioscore)



Commercial & project income

£3.9m Year 1 and 2

75% growth in 4 years

55:43 Public-Commercial split

2026/7 Outlook: Opportunities

EVENTS

Fleadh

Euro's Draw & U17 Women's

City events & festivals

America 250

STRATEGY

NI Business Events Strategy

3-year Enhanced RTP / 20th Anniversary / Dest Stewardship

NI Travel trade strategy

INVESTMENT

£830m investment

800 additional hotel rooms

Retail, tourism, hotel development - city centre, neighbourhood & regional investment

US & Canada route potential - BIA

City Airport Masterplan

GROWTH

ROI, GB & US demand

Asian market development

Luxury market

Food and drink tourism

Peace Tourism

2026/7 Outlook: Challenges

ECONOMIC

Cost of doing business

Cost of living

Belfast costs for visitors

Public finances & funding

Softening of city hotel performance - midweek & shoulder

POLICY

Regional Balance

UK vs ROI VAT

Geo-political uncertainty

INFRASTRUCTURE

Direct European & International Air access

EXPERIENCE

Staffing & service levels

Complex lives & anti-social behaviour

2026-7 Key development areas

- 1 Fleadh 2026 & 2027
- 2 Next generation visitor servicing
- 3 Belfast's Gateway role and regional growth
- 4 Industry partnership development
- 5 Digital, innovation & AI
- 6 Emerging market development
- 7 NI Business events strategy & funding growth
- 8 Neighbourhood tourism
- 9 30 Years of Cruise





26-27 DELIVERY

MARKETING & COMMUNICATIONS



Marketing & Comms Targets

6% year on year growth

£66m

Leisure economic impact

400K

Leisure Bednights

285k

Leisure Trips (O/N)

425K

Leisure Day trips

6 CAMPAIGNS

GB, ROI & NI

3m

Web visits

67.6m

Social media Impressions

37m

Social views

4.6m

Social media Engagements

23K

NEW email subscribers

150m

PR & Comms

Opportunities to See

Priority Focus

Fleadh Cheoil the biggest cultural moment for the City

Neighbourhoods 'Explore the Unexpected' activations that explore local character, culture and new discovery

'30 Years of Belfast Welcomes' with Cruise Belfast

Key Projects across Marketing and Communications in 26/27



Fleadh - PR, Marketing and Web Support



Expanding Neighborhood Focus across Marketing Channels



Cruise Belfast "30 Years of Belfast Welcomes"



Key City Event Support across Campaigns



Continuous Digital Development across web, screens and AI Roadmap



Regional Tourism Partner Brand Positioning

Priorities for 2026/27

Business as Usual Focuses

Fleadh Cheoil Integrated Marketing Approach

“Feel the energy of the Fleadh.”

A simple message highlighting music, dance and Belfast’s atmosphere designed to create a sense of welcome and shared celebration supported with Digital and PR

Advertising in the Republic of Ireland

9 weeks of television advertising

14 weeks of radio advertising

Billboards in Dublin and border counties

Online advertising and social media promotion

Advertising in Northern Ireland

12 weeks of online TV advertising

Radio campaign across leading NI stations

Digital outdoor screens in commuter towns

Online advertising with local publishers



Public Relations & Digital Engagement

Alongside advertising, we are delivering a coordinated public relations and digital programme to build momentum before, during and after the event.

A three-phase PR and Communications approach:

Build Awareness – National and regional media coverage.

Drive Engagement – Stories on participation and local preparations.

Showcase Impact – Highlighting key moments and long-term benefits.

Digital Platform – FleadhCheoil.ie

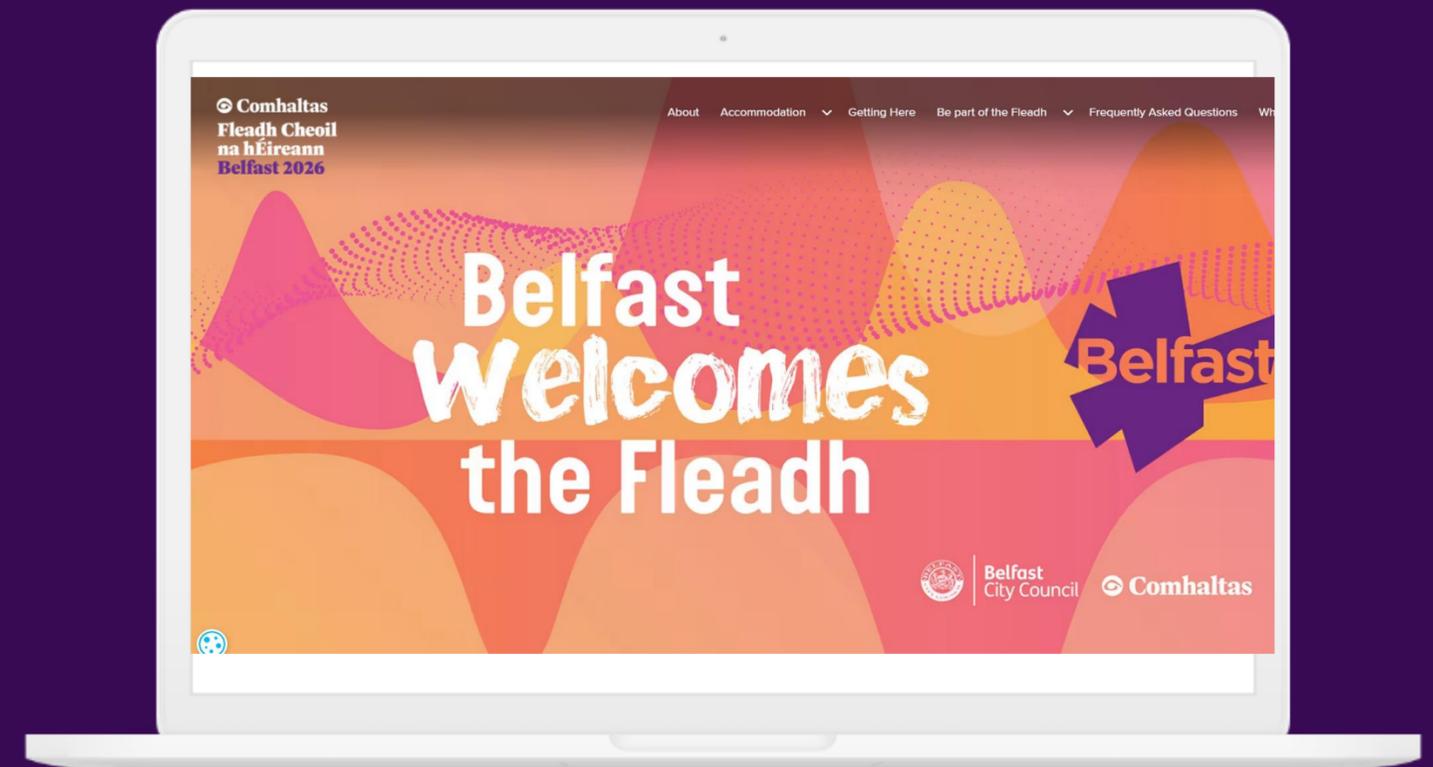
Central online hub for official event information.

Showcasing over 2,500 accommodation options.

Live updates, travel information and clear visitor guidance.

Post-event highlights and visitor stories.

Capturing visitor insights to inform future planning.



New Neighbourhood Marketing and Communications

One City, Many Local Stories

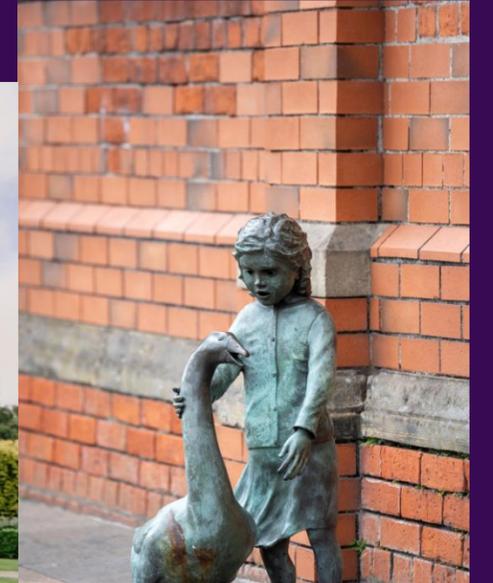
Bring Belfast's neighbourhoods to life within the city brand, spotlighting the authentic experiences and hidden gems that exist beyond the city centre.

Unified Narrative

Use Explore the Unexpected to highlight local character, culture, and discovery beyond the city centre.

One Clear Message Across All Activity

All marketing and communications use the same core message, imagery and themes. This keeps the campaign balanced, easy to understand and recognisable wherever people see or hear it.



New Neighbourhood Marketing and Communications

Four Campaign Pillars

Unexpected Places

Hidden gems and overlooked locations that surprise and delight visitors, from tucked-away cafés to architectural marvels that don't make the guidebooks.

Unexpected Experiences

Unique activities and moments that can only happen here, whether it's a traditional music session or a cutting-edge cultural event.

Unexpected Stories

Authentic narratives from the people who make these neighbourhoods vibrant, celebrating local history, creativity, and community spirit.

Unexpected Welcome

The genuine warmth and hospitality that defines Belfast's character, making every visitor feel like they've discovered something truly special.

City Areas / Directions

North | South | East | West

Broad geographical quadrants that provide orientation and thematic framework

Established Quarters

Example: Cathedral | Titanic | Gaeltacht | Queens

Recognized districts with established identities and visitor infrastructure

Neighbourhoods

Distinct local areas with unique character, culture, and community voice

Cruise 30 Years of Belfast Welcomes

Our Aim

The 30th anniversary provides an opportunity to consolidate Belfast's position as a leading cruise destination over the next decade, drawing on our proven heritage while advancing innovation and sustainable growth.

Awareness

Generate earned media coverage across trade, travel, and regional outlets. Amplify the narrative through owned, earned, and partner channels. Reach cruise passengers pre-arrival through compelling onboard content.

Sentiment

Shift Belfast resident perception from "tourists arriving" to "community benefiting". Reinforce Belfast's reputation within the industry as a trusted, forward-thinking destination. Position BCC, Belfast Harbour and Visit Belfast as steward of long-term cruise success.



30 Years of Cruise – Heritage, Community & Future Growth

30 Stories, 30 Voices

- Short videos and written profiles featuring port workers, tour guides, taxi drivers and cruise partners.
- Showcasing how cruise tourism has supported local jobs and businesses over three decades.
- Highlighting real community impact and civic pride.

Cruise & City Week

- A dedicated week of activity designed to engage Belfast residents:
- Cruise Terminal Viewing – Organised opportunities for residents to watch ship arrivals and departures.
- Onboard Ship Visits – Limited family visits to experience cruise operations firsthand.
- Talks & Exhibitions – Accessible sessions explaining cruise tourism's economic and cultural contribution.





26-27 DELIVERY

BUSINESS EVENTS



Business Event Targets

5% year on year growth

£39m

Business economic
impact

38.5k

Business delegates

100k

Business bednights

£140m

Leads

£100m

Bids

2,000

Business buyer
engagements

100%

Client
recommendation
rate

230-250

Forward booked events
supported – destination
management

12.5k

MICE database
6.5K ezine
subscribers

11k

Social media followers

Real value of business
tourism in NI
c£100-£115m p/a
NISRA (2024)

Market Context & Opportunities

Market Context

- Strong optimism and demand but persistent cost pressures
- VFM is key – balancing cost pressures with delegate experience
- 65% of meetings are taking place outside Tier 1 destinations
- Increasing length of stay to maximise value of trips & ‘bleisure’ opportunity
- Sustainability now embedded in event strategy, venue & destination selection

Belfast Opportunity & Approach

- 84% of business events are midweek – source of high spend, year-round visitors
- Belfast well positioned to meet changing demands of organisers – sectors, sustainability
- Re-launch of NI ambassador network – largest sales channel for the city (80%)
- Launch of new sector advisory panels aligned to DfE sector development plans
- Event legacy – economic, education, social impact
- Extreme collaboration – TI, TNI, Industry & 1,400 strong Ambassador Network



TRAVEL TRADE

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TRAVEL TRADE TARGETS & FOCUS

£2M

Travel Trade Leads
Revenue Value

20,000

Bednights

8,000

Daytrips

400

Buyer
Engagements

3,000

Travel Trade
Operator Database

Demand Generation & Market Development

- £1.3m of VB leads converted into contracted businesses in the current year
- Balance between maximising business and ROI from established markets vs investing in new emerging markets
- North America, Canada and Asia* key opportunities
- TNI new travel trade strategy for Northern Ireland (March 2026)
- Luxury - Belfast Luxury Collective action plan

Short curated stress-free
breaks

Authentic off-grid lesser-known
experiences for stand-out

Growing integration of AI by OTA and meta sites could help
NI as a compelling but less familiar destination

Experiential, transformative and sharable travel products
could position Belfast and NI as a story-driven choice for
travel trade

Iconic attractions & game-changing hotel investment
Compelling city and country offer
Cool-cations / TripAdvisor accolades / Fleadh – hooks
VB destination support & industry collaboration



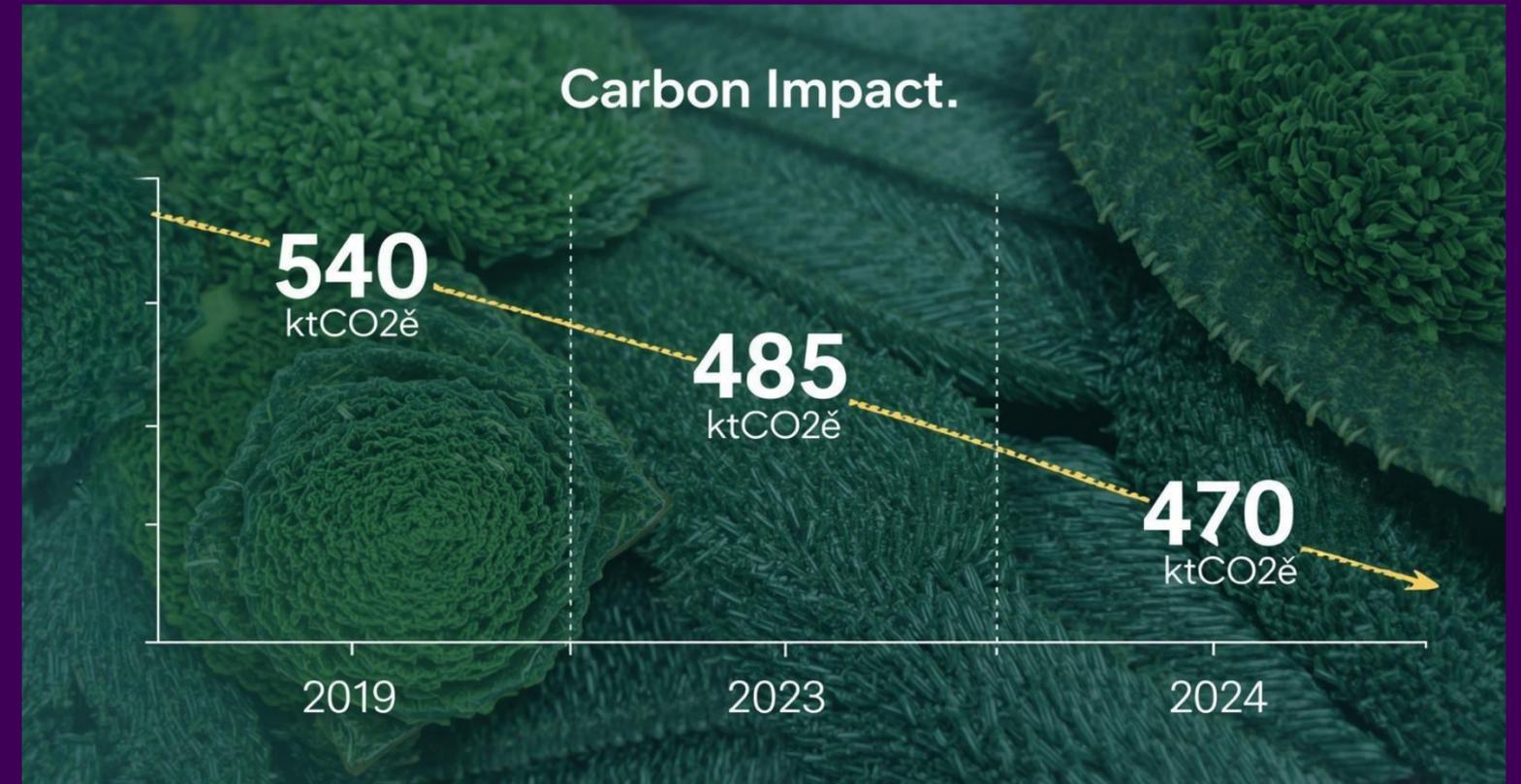
SUSTAINABILITY & IMPACT

visitBelfast

Environmental Impact

Visit Belfast now measures Tourism's carbon footprint annually

- Visit Belfast partnered with BCC Climate/Tourism teams and EY Paris to develop a pioneering carbon footprint model for tourism
- Belfast is now one of the few tourism destinations to measure and publish its total carbon footprint annually (inc. travel)
- Today we also launched the Belfast Tourism Net-Zero taskforce with industry & chaired by BCC Climate Commissioner



10%

Belfast's tourism carbon impact equates to approx 10% of the city's total emissions in line with percentage of people employed in sector

57%

Belfast's carbon impact is travel to and from the destination

-13%

Tourism's carbon footprint has decreased largely driven by post pandemic market recovery patterns

Environmental Impact

Belfast is leading the way in regenerative tourism practice

Top 10 GDS Index

Belfast ranks 9th in Global Destination Sustainability Index. Top on island of Ireland and second only to Glasgow in UK

74% Bedrooms

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

100 Businesses

Industry partners and clients supported on sustainability objectives by Visit Belfast

First city-wide multi-venue Reusable cup solution to tackle single use plastic

96% VB Partners Adopting sustainable practices

51% VB Partners Measuring Carbon emissions

Social Impact

Strong Resident Support for - and Pride in Tourism

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

Funds raised

Over £1.4m raised last year – 25/26 results due in April

63,456

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

2,131

Students supported through educational outreach programmes

Legacy

From retired teachers donating tutoring hours to Foodstock & cyber safety events with schools



VISITOR SERVICING & CRUISE

visitBelfast

Visitor Servicing & Cruise

£19m

Visitor servicing
Economic Impact

825k

Visitor enquiries

4 VICs

BWC / BIA / Cruise /
Grand Central /Off Site

32%

Regional Dispersal

£26m

Cruise
Economic Impact

296k

Cruise Pax &
Crew

138

Cruise Calls
2026

11

Cruise
Turnarounds

95%

Visitor
Satisfaction

9.5% YOY Growth (economic impact)

8.5% YoY Growth in enquiries

Fleadh 2026

D3 planning 2027 for Cruise season 2028

Neighbourhood Tourism - New Framework

Cruise



138 cruise ships in 2026
296k cruise visitors



£26m economic impact

Business Development & Cruise Management

- Busiest single transit hub in UK & Ireland
- Cruise is fastest growing tourism segment in next 5 years
- By 2035 – expected to be worth c£40m
- April – October season
- 11 turnarounds – bed nights
- 73% staying after 6pm – evening economy
- Key growth areas – Luxury & turnarounds
- Cruise Hub will relocate to D3 for 2027 /28
- Deliver a smooth visitor journey: welcome, VIC provision, shuttle buses, logistics
- Cruise animation programme with partners & communities
- Gateway role

26-27 Business Plan Conclusion & Summary

Plan Progress

60% through plan – 75% of target achieved

Triple Bottom Line

Economic, social & environmental strategy working

Business Critical

Commercialisation, digital innovation, sustainability

Key Themes

Fleadh, Luxury, Peace, Neighbourhood, Culture, Food, Titanic, Fashion

Key Focus

Low occupancy, business events, GB, ROI, Direct Access

£150m

Economic Impact

55:43

Public / Commercial

£1:71

BCC ROI

£1:£1.23

BCC Leverage