



Belfast: Integrated Tourism Strategy

Strategy summary
2015 - 2020



Draft January 2015



northernireland
tourist board



Belfast
City Council



Introduction

Background

The Belfast Integrated Tourism Strategy sets out our aims, objectives and major projects to drive the expansion of tourism into Belfast. In particular, it shows how we can:

- develop and manage the city's reputation as a destination,
- build the capacity of the city with regard to facilities and services for tourists, and
- prioritise the development of new products and attractions for visitors.

By working with the main partners across the city, we aim to double the value of tourism to £870million per year by 2020.

Method

We appointed an international consultancy firm to develop the strategy. They undertook extensive consultation involving face-to-face and telephone conversations with approximately 120 tourism sector stakeholders, as well as workshop discussions with approximately 70 people.

This was supplemented with thorough desk based research, business surveys and a benchmarking exercise against other European destinations. We discussed initial ideas with city stakeholders at the Belfast: Future City Conference in June 2014.

The strategy has also been equality screened and discussed with the council's Equality Consultative Forum.



Importance

Tourism is the largest and fastest growing industry in the world today accounting for 9% of global GDP and employing 8% of the working population. In 2013 the visitor economy of Belfast was valued at £438.4m generated by approximately 9.4m visitors. On some nights during peak tourism periods there can be in excess of 4,000 temporary overnight residents in Belfast city centre. This expenditure supports over 9,300 jobs across the city.

Tourism also helps to promote a positive image of the city, support local businesses, stimulate civic pride and can help to sustain services, events and facilities that are highly valued by the local community.

Context

Recent progress

Belfast has received many accolades in recent years, and a small selection is listed below.

One of the world's top destinations for 2012 by National Geographic Traveller magazine.



One of the top 10 places in the world to hold a conference or major event in 2012 by the Financial Times.

Best value city break in 2012 by Trip Advisor.

Current weaknesses

A benchmarking exercise identified a number of areas where Belfast could improve its approach to tourism and the offer to visitors.

REPUTATION MANAGEMENT

There is a need for a shared philosophy and vision for tourism in the city that is shared by all of the stakeholders. There needs to be improved stewardship of Belfast's physical assets (referred to as 'hardware' within the strategy) and our less tangible assets such as our culture, history and reputation (referred to as 'software' within the strategy). There are areas of visitor management that could be improved.

CAPACITY BUILDING

To develop tourism the city needs to clarify the roles and responsibilities of the key stakeholders and agree an organisational structure. There is a need for an agreed tourism implementation plan.

PRODUCT DEVELOPMENT

To attract more visitors, the city needs to become more competitive. There is scope to stimulate local enterprise and support businesses to improve their products and services to visitors.

PERFORMANCE FIGURES

In terms of performance against government targets for the whole of Northern Ireland, the 2013 figures show a 2% decline in domestic trips and a worrying 7% decline in overnight tourists from the Republic of Ireland.

Current strengths

There are several areas where Belfast's tourism is already well developed:

REPUTATION MANAGEMENT

The city is considered to provide good value for money in comparison to other city break destinations.

CAPACITY BUILDING

The quality of service and hospitality are highly rated by visitors.



PRODUCT DEVELOPMENT

The location and setting of the city, plus its culture and heritage, are valued by visitors and provide opportunities for further product development. The existing activities and events are well regarded, as are the entertainment and dining options in the city.

Drivers for city tourism

Research by UN World Tourism Organisation has identified a number of new drivers for city tourism, which are listed below.

The renaissance and re-emergence of the city as a holiday destination.



The dominance of young markets and those who are 'young at heart'.

The importance of business tourism - the meetings, incentives, conferences and exhibitions (MICE) markets.



New enlightenment - moving beyond experiences and activities to trips that help people understand and appreciate an aspect of the place they are visiting, such as its history and culture.

World citizenship (sustainability, responsibility and diplomacy).



The rise of new forms of urban sports tourism.

The importance of signature festivals and events.



The need for local 'narratives' to let people understand and become interested in the history, culture and values of the place they are visiting.

Innovation and creativity to deliver hybrid products and services.





Market segments

As a city destination, Belfast attracts the following tourist segments:

- day visitors or involved in at least one overnight stay,
- discretionary leisure city break tourism attracted by events, festivals, heritage, arts, culture, sports and retail,
- discretionary business tourism attracted by meetings, incentive travel, conferences and exhibitions (the 'MICE' markets),
- non-discretionary business tourism: driven largely by independent corporate travellers that visit Belfast only because they have business in the city, and
- visiting friends and relatives (VFR): people who are visiting friends and relatives for social or family-related activities.

The focus of a tourism strategy should be to generate discretionary tourist overnight stays (leisure and business) especially those using commercial accommodation. These visitors will usually spend the most money during their stay, and so make the biggest impact on the city's economy and support the most jobs.



The 'drivers' section (described above) mentioned the dominance of young markets and those who are 'young at heart'. People in this sector are sometimes referred to as 'Millennials' and they are a good match with Belfast's current tourism offering. They are expected to reach their peak spending years between 2017 and 2020. Millennials will also drive trends in business travel and by 2025 they will command a 50% market share of all business flights. Hence they will remain a priority in the strategy.

Although younger markets (18-35) and the 'young at heart' will be the main focus of the strategy, the city should still ensure it has a range of services and activities to attract each of these main market segments.

Stakeholder concerns



AIR ACCESS

There are concerns about the limited air access to Northern Ireland (NI). Department of Enterprise Trade and Investment (DETI) officials are working on a NI 'Air Route Development Fund', focussed on developing new European routes into Northern Ireland.

VISA REQUIREMENTS

The issue of differing visa requirements of UK and Irish governments places NI at a significant competitive disadvantage. There are moves to improve this situation. These include introducing biometrics into the Irish visa process to meet UK Border Agency requirements and discussions to allow visitors from some destinations to enter the UK from the Republic of Ireland (ROI) using an Irish Visit Visa.

CURRENCY AND VAT

NI's currency is sterling; however, the Republic of Ireland (ROI) operates within the Euro-zone and this can either impair or encourage travel between the two areas depending on exchange rates. Different VAT rates can also be an issue. There is currently a sustained campaign ('Cut the Tourism VAT') across the UK to get a reduction on tourism VAT and so bring it into line with competitor countries.



REPUTATION

The report “GB Tourism Market Strategy: Unlocking the Code for Growth” concluded that:

“In comparison to ROI and GB destinations, NI is at an early stage of development as a holiday destination. For this reason it will require a concerted effort of all stakeholders to change attitudes, develop and communicate compelling reasons to holiday here.”

The report highlights the fact that NI’s image perceptions are most strongly related to political unrest and violence and markets have a latent fear that they will not be welcomed in NI. This important point is also made in the Hunter Review and is a consistent, often repeated, concern amongst consultees.

FRAGMENTATION

There are many different stakeholders trying to develop tourism within the city and this includes multiple government agencies. As a result, there is a concern from many stakeholders that there is no overall coherent tourism strategy.

REGIONAL STRATEGIES

This strategy has been developed with consideration of other associated strategies. In particular, it is intended that it will align and contribute to the appropriate regional strategies that have been developed by the Northern Ireland Assembly.

In 2009/10 DETI undertook an extensive consultation into the future of tourism in Northern Ireland. This resulted in a number of targets to grow tourism’s contribution to the economy and these were included in the Programme for Government. DETI’s targets for 2020 include 4.5m visitors and visitor spend of £1bn.

To achieve this, the Northern Ireland Tourist Board (NITB) Corporate Plan 2011-2015 has five strategic objectives, listed below.

- Unlocking the potential
- Building the organisation
- Developing quality visitor experiences
- Promoting the destination
- Being an excellent organisation

In recent years, NITB has also been developing the concept of ‘experiential tourism.’ The Belfast: Integrated Tourism Strategy embraces this concept.

Strategy aims

OVERALL AIMS

- To make Belfast a city that wants to welcome the world and to share its story by creating a destination that the world wants to experience firsthand.
- To build prosperity for our community by becoming a world leader in innovative, dynamic tourism development and marketing supported by an unrivalled desire to give all our guests unique Belfast experiences.



STRATEGIC THEMES

To achieve the overall aims, this strategy provides one central document that combines the work of all of the key partners so that their initiatives achieve the greatest impact. It has three strategic themes:

- Reputation management: promoting what the city has to offer and overcoming any negative preconceptions.
- Capacity building: strengthening the sector so that the final quality of service and hospitality experienced by visitors is highly rated.
- Product development: creating new things for visitors to see and do.

A range of actions associated with these themes is shown in later sections. However, there are several priority areas and these are shown below:

- development of the 'Ideas Factory' and innovative solutions
- creating a city of urban adventure
- moving beyond peace
- being international
- Collective social responsibility (CSR) agenda: 'the giving city'
- youth and younger markets; and
- the Belfast way of working

TARGETS AND MEASURES

The strategy focuses on one main target: doubling the value of tourism to £870 million by 2020. This will require an increase in other areas related to improving our tourism sector such as:

- increased promotional reach,
- improved quality of service, and
- increased tourism product.

Doubling the value of tourism will also produce other results such as creating jobs in the sector, reducing unemployment and contributing to the city's growth in Gross Value Added (GVA).

To hit the target by 2020 we will require:

- clear positioning
- establishing a reputation as a global leader highly satisfying, tourism experiences that strengthen the connections between the tourist and the city
- making Belfast a destination of choice for increasing numbers of leisure and business tourists
- increasing the city's year-round appeal as a high quality, leisure and business tourism destination; and
- creating prosperity for all residents and securing widespread support for the importance of tourism to the economy



Action areas

Potential projects and actions are described below. We intend to set up stakeholder task groups to develop these.

REPUTATION MANAGEMENT

MARKETING ACTIVITY

- Work with partners to develop a Memorandum of Understanding (MOU) with clear delivery parameters.
- Joint marketing with Tourism Ireland (TIL) in cities with direct access.
- Joint marketing with NITB in an all-Ireland context.
- Establish a tourism monitor with a focus on hotel occupancy and social media-based research.
- Increased focus on 16-35 markets and 'young at heart' audience. Proposed 60:40 split with 'culture seekers'.
- Increased focus on campaigns.
- Sustained campaigns collectively agreed and resourced for Belfast.
- Review the resourcing and effectiveness of digital marketing of the city.

VISITOR MANAGEMENT

- Management of Visit Belfast Welcome Centre.
- Provision of coach parking.
- Oversight of city coach tours.
- Enhanced trail and route development across the city and beyond.
- Enhanced provision for handling payment by Euros across the city.
- Delivery of the cruise terminal at Belfast Harbour.
- Integrated visitor pass.
- Work with both Belfast International and George Best Belfast City airports to ensure enhanced air access.



BUSINESS TOURISM

- Visit Belfast (VB) to lead on city sales and marketing activity.
- Put in place an MOU between key stakeholders to ensure resources are aligned.
- Resource and manage a Belfast 'Ambassador Programme'.
- Attend appropriate trade shows and events.
- Enhance packaging of products to add value to the conference experience.
- Organise a bid fund to attract international conferences.
- Detailed analysis of Belfast's areas of international prominence.

BRANDING AND CITY POSITIONING

- Commission a place positioning strategy and agree a delivery plan for the city.

TOURISM EVENTS AND FESTIVALS

- Attract one international event per annum.
- Develop six Belfast signature events to take place throughout the year to attract significant visitors and international PR coverage.

CORPORATE SOCIAL RESPONSIBILITY

- Develop and deliver a structured programme of projects targeted at creating opportunities for communities in Belfast and international destinations emerging from conflict.

CAPACITY BUILDING DEVELOPMENT AXIS: KEY ACTION PLANS

- Develop an international hotel school located in Belfast.
- Tailor support programmes for future leaders utilising international best practice.
- Review existing tourism and hospitality training provision in NI.
- Tailor programmes designed to encourage opportunities at entry level in the hospitality sector.

PRODUCT DEVELOPMENT AXIS: KEY ACTION PLANS

- Develop an international-quality city centre attraction.
- Utilise outdoor and vacant spaces to create the city as a gallery.
- Create and promote an urban sports hub.
- Range of minor infrastructure e.g. zip lines and urban mountain biking.
- Additional maritime activity including water taxis, a floating hotel, and a maritime visitor experience.
- Research new accommodation types in keeping with target segments.
- Increase the number of hotel bedrooms by 1,500.
- Develop five star hostel accommodation.
- Create a year-round showcase to celebrate the screen industry.
- Deliver a permanent 'Belfast Story' exhibition.
- Deliver a suite of 'soft product development' initiatives throughout the city.
- Develop a programme of activity to enhance the offering and connection with visitors.



DELIVERY MECHANISMS

Delivering the strategy will involve a range of partners and agencies within the private and public sectors working together. Therefore there needs to be a period of defining the role of partners and agreeing a collective agenda.

With Local Government Reform, the council will be in a central position to help guide city development, investment and regeneration which benefits everybody in the city; therefore initially we will act as the coordinating body for implementing the strategy. The key tourism partners are Northern Ireland Tourist Board, Tourism Ireland and Visit Belfast. The private sector will be embraced and facilitated to take on a leading role. However, the strategy will require the involvement of a range of city stakeholders including:

- Belfast Harbour Commissioners,
- Belfast International Airport,
- Central government departments e.g. Department for Employment and Learning (DEL) and the Department for Enterprise, Trade & Industry (DETI),
- Invest Northern Ireland (INI),
- George Best Belfast City Airport,
- Translink, and
- Voluntary and Community sector organisations e.g. Arts Council of Northern Ireland (ACNI).

It is proposed that appropriate task and finish groups should be established to deliver agreed action plans and projects. The action plans will build on individual agency and stakeholder deliverables to develop a more cohesive agenda over time. This will deliver mutually beneficial and shared targets and outcomes for the city and achieve the ambition of doubling the value of tourism in the Belfast by 2020.



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