



Subject:	Tourism and Events Update 2019/20
Date:	9 October 2019
Reporting Officer:	John Greer, Director of Economic Development
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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"/>
Sometime 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 this report is to provide Members with an overview of a number of emerging priority areas of work for the Council to support in relation to the development of tourism and events in Belfast.
1.2	Members will be aware that at a meeting of the City Growth and Regeneration Committee in August 2019 the ten year cultural strategy for Belfast was agreed. This strategy identified the

1.3	<p>potential for Belfast to position itself to visitors as an events destination as well as the need for ongoing wider tourism growth and the linking of current and future tourism attractions to relevant community tourism assets.</p> <p>In order to prepare for the delivery of this strategy from April 2020 onwards a number of priority areas for the remainder of 2019/20 have been identified and are set out in this report.</p>
2.0	Recommendations
2.1	<p>The Committee is asked to:</p> <ul style="list-style-type: none"> – Note the work ongoing to support tourism development in the city – Approve the commissioning of the visitor economy research, at a cost not to exceed £25,000 – Approve the commissioning of the Visitor Experience Mapping and Development Plan, at a cost not to exceed £80,000 – Approve the commissioning of a strategic development plan for a reimagined Maritime Festival, at a cost not to exceed £80,000 – of which £50,000 to come from the Council and £30,000 to come from other partners – Note the priority areas of work from October 2019 to March 2020 and approve the allocation of budget from within existing departmental resources – Note the details of emerging events that may be considered for future investment as part of the Cultural Strategy’s positioning of Belfast as an events destination and grant approval for officers to take forward negotiations with relevant bodies – Agree to receive subsequent reports with full details of resource implications in advance of any formal bidding process – Agree to provide a financial allocation of up to £50,000 towards the hosting of the Irish Traditional Music Awards “Gradam Ceoil”, scheduled to take place in Belfast in February 2020 – Provides approval to enter into a temporary sharing arrangement between the council, Visit Belfast and GOH to provide box office services during the renovation works in 2020.
3.0	Main Report
3.1	<p>Belfast has evolved into a successful and increasingly popular visitor destination over the last decade or more. This development hasn’t gone unnoticed in the global tourism market. In 2018, the Lonely Planet identified Belfast and Giant’s Causeway as the top place to visit. A rich and authentic blend of natural assets coupled with a unique cultural heritage, a vibrant cultural scene and a long-renowned warmth of welcome means that visitors are increasingly</p>

	<p>being drawn to the city. The new cultural strategy, which has recently been endorsed by the Council, identifies the importance of events and festivals as part of the city's cultural offer. The new investment approach agreed as part of the strategy supports alignment between our investment in events and festivals and the key priorities of the new cultural strategy.</p>
3.2	<p>With recent investment in tourism infrastructure and improvements to connectivity, as well as the development of new areas of stand-out such as screen tourism and an award-winning hospitality offer, the key foundations stones are in place to support the development of the tourism sector in the city.</p>
3.3	<p>However there is much more room for growth. Tourism NI has recently announced its ambition for tourism in the region to become a global export business worth £2 billion by 2030. Belfast already makes a significant contribution to the regional tourism industry. Recently-released figures from NISRA (Northern Ireland Statistics and Research Agency) indicate that tourism expenditure was in the region is £395million last year accounting for 41% of the value of tourism expenditure across NI which was £968million.</p>
3.4	<p>This ambition is recognised and shared by the key partners from both the public and private sector. They believe that the growth will only be delivered if there is a focused approach to tourism development in the city that is built on maximising the return on the recognised standout by developing and connecting new and existing products and experiences for a growing number of visitors to share and enjoy.</p>
3.5	<p>The inclusion of tourism as a key growth sector in the recently-agreed City Deal validates and supports this view. It acknowledges the fact that the sector is already a significant economic generator but recognises the need for significant additional investment in order to move to the next level.</p>
3.6	<p>Our engagement with partners in developing the new Cultural Strategy identified the following four priorities for tourism development over the next four years:</p> <ul style="list-style-type: none">– Enhancing and enriching the visitor experience– Support the development of new tourism experiences and connecting existing/new tourism experiences to community tourism assets– Focusing the tourism marketing and communications– Supporting skills development to enhance tourism growth and development.

3.7	<p>A number of actions will be taken forward this year in support of the long-term tourism growth and development that will lay strong foundations for the success of the new Cultural Strategy, in turn supporting the delivery of the Belfast Agenda. Recommended priority actions to be completed over the next six months are outlined below.</p>
3.8	<p><u>Visitor Economy Research</u></p> <p>Despite significant growth in the visitor economy, Belfast still has considerable progress to make in order for the contribution of tourism to the economy to be on a par with comparator UK and ROI cities. A more intelligence-led approach is required to establish the potential size of Belfast’s growth market and to understand the threats and opportunities associated with delivering against the regional targets and those set out in the Belfast Agenda. The first step in this process is to undertake an audit of existing research and commission up to date research that will:</p> <ul style="list-style-type: none"> – Create an evidence base which quantifies Belfast’s ongoing position as the regional driver for tourism with detail of the level of growth required within the city region to deliver on established city and regional targets. – Provide insights into the market viability and contribution of further capital or product developments proposed in Belfast between 2020 – 2025 including the Destination Hub/Belfast Story project as part of the Belfast Region City Deal – Forecast the number of visitors to Belfast annually until 2025 using existing data sources and trends within a range of agreed scenarios. Using this forecast establish within those scenarios the expected GVA change for each scenario – Assess the potential threats and opportunities to delivering on these targets.
3.9	<p><u>Visitor Experience Mapping and Development Plan to include an integrated approach to local tourism and the Belfast Region City Deal</u></p> <p>A number of case studies of successful cities have identified the importance of developing a clear tourism narrative that is then supported by a visitor experience plan. The purpose of a more integrated visitor experience approach is to ensure that there is more effective investment in and positioning of the tourism offer including the need to ensure that the economic benefits of tourism can be accessed across the city. This approach to tourism development will support all four of the priorities set out at 3.6.</p>
3.10	<p>Furthermore, given the development of the Belfast Brand, the emerging Tourism NI experience brand due in market from late 2019 and the Belfast tourism narrative and themes</p>

	<p>included in the ten-year cultural strategy, it is recommended that Belfast now develops a detailed visitor experience plan that will:</p> <ul style="list-style-type: none"> - Increase understanding, coherence and visibility of the authentic Belfast visitor experience - Increase understanding of the market fit in relation to product development and positioning - Build on and increase sustainability of investments to date - Increase understanding of the visitor journey and identify opportunities for increasing dwell time and spend across the city - Add value by creating and co-ordinating a more integrated approach to the Belfast offer.
3.11	<p>The plan will include the following elements:</p> <ul style="list-style-type: none"> – Mapping of existing tourism assets including an assessment of quality, market fit, sustainability and brand fit – Completing a gap analysis of experience-based products including consideration for how planned new developments will support additionality rather than displacement or duplication – Developing and creating thematic and geographic clusters of tourism product across the city – Producing an investment framework in tourism that will support Council to leverage funding into long-term sustainable tourism development from other public and private sources – Clearly and strongly positioning Belfast as the driver for tourism growth in the region and supporting the development of its positioning on the island of Ireland.
3.12	<p><u>Developing Belfast as an Events Destination</u></p> <p>Market research indicates that the key market segment for visitors to Belfast and Northern Ireland is the “culturally curious” visitor. These visitors are interested in the cultural heritage of the place and enjoy the authentic experiences that Belfast has to offer. One of the most popular forms of cultural expression is delivered through the programme of events that take place in the city.</p>
3.13	<p>The City Growth and Regeneration Committee, at the Special meeting on 28 August, agreed the new Cultural Strategy for the city “A City Imagining”. This includes a new approach to Council support for festivals and events. It proposes a more strategic process of investment,</p>

	<p>focusing on those events that align most closely with the city narrative and that will deliver on the cultural and economic ambitions, as set out in the Cultural Strategy and Belfast Agenda.</p>
3.14	<p>As part of this work, a new multi-annual grant for Festivals and Events is due to open for applications in October 2019 providing up to 4 year funding for events from April 2020 onwards. This will help to provide the levels of investment to support signature Belfast events of the desired scale and ambition.</p>
3.15	<p>In addition to this investment, the Council continues to be responsible for the direct delivery of a number of key events. These events also have the potential to grow to become signature city events. However in order to do so an increasingly strategic and partnership-based delivery model must be adopted.</p>
3.16	<p>Members will be aware that the Maritime Festival is one of the most significant events in the annual events calendar. The maritime theme has emerged strongly in the new tourism narrative and our research indicates an opportunity and willingness among partners to re-scope this event. While there is still some work to do, the proposal is that the event will become biennial (taking place in the year that the Foyle maritime festival does not happen) and that consideration is given to how the unique Belfast angles could be developed further, including the link to Titanic. The ambition is to grow this event to a turnover in excess of £1million working alongside existing and new partners. It is recommended that this is the first of Council's events to be fully reviewed and relaunched with the remaining programme to be refreshed from 2020 onwards.</p>
3.17	<p>To support the development of the Maritime Festival, it is proposed that the following work is commissioned:</p> <p><i>Review</i></p> <ul style="list-style-type: none"> – Review of current festival offer and impact to include a competitor analysis of international maritime festivals and other signature city events of comparable scale. – Market analysis including opportunities for Belfast to take forward a signature event that supports visitor economy and responds to market trends. – Consideration of benefits of establishing a biennial model.
3.18	<p><i>5 year Strategic Plan 2020 - 2025</i></p>

	<ul style="list-style-type: none"> – Develop a creative vision including a strong strategic and creative narrative for the festival. – Short, medium and long-term goals for: <ul style="list-style-type: none"> o Audience development – local, national and international o Brand positioning o Marketing and communications o Capacity building including partnership working and skills development. – Governance and delivery model including wider stakeholder engagement plan. – Financing approach including business modelling that considers public, private and earned income. – Programming approach including but not limited to responding to and developing the cultural, heritage and physical assets of the city. – Evaluation including proposed Key Performance Indicators and data collection over a five year period.
3.19	<p><i>Programme Development</i></p> <ul style="list-style-type: none"> – Outline programme – to include identification of development opportunities and key projects for 2021, 2023 and 2025 including artists, cultural organisations and commissions. – Role and development of local cultural sector in long-term programming approach. – Development of a community engagement programme. – Potential programming enhancements including opportunities to bid for, secure or developing international linkages. – Detail of how the event might support wider cultural and economic ambitions of the city through complementary programming and activities.
3.20	<p><u>Major events</u></p> <p>The cultural strategy commits to a more strategic and sustainable approach to bidding for major events for the city, building on a number of successes in recent years. At the core of this process should be effective partnership working with other statutory agencies and ensuring that major events have a long-term legacy that contributes to local capacity building and transformation.</p>
3.21	<p>Over the last decade, the Council has delivered a series of high profile national and international events. Members are reminded that the city has played host to The Tall Ships Race in 2009 & 2015, 2011 MTV’s European Music Awards, the 2014 Giro D’Italia along with</p>

	<p>a series of events across 2017 (International Ice Hockey World Championships; World Endurance 24 Hour Race; UEFA Under 19 Women’s Euro Championships and the 2017 Women’s Rugby World Cup) and in 2018 Belfast was the host location for a series of BBC lead projects inclusive of the Radio 2 Folk Awards, the BBC Biggest Weekend and the BBC Proms in the Park.</p>
3.22	<p>It is important to note that the process for securing events of this scale and impact is often subject to significant lead-in times; partnership buy-in; sizeable multi-partner budgetary resources; diary scheduling; highly competitive bidding processes; venue capacities; etc. It is therefore recommended that officers scope opportunities for the period 2020-2025 in line with the cultural and tourism priorities that have been agreed. Details on any potential bids would be presented to Members for their approval in advance of any formal bids.</p>
3.23	<p>Two initial opportunities have been identified that strongly align to the new Cultural Strategy. These are:</p> <ul style="list-style-type: none"> – All Ireland Fleadh Cheoil: The potential to bid for Fleadh Cheoil strongly contributes to the overall priorities set out in the cultural strategy due to the level of economic return; contribution to long-term capacity building and alignment to the city’s aspirations to become a designated UNESCO City of Music. As part of UK City of Culture in 2013 it is estimated that Fleadh Cheoil delivered 430,000 attendees and £40 million return for a £1.5 million investment – Tall Ships: An opportunity has emerged to bid for Tall Ships Race in 2023. This would support the growth of the Maritime Festival and provide a major flagship as part of the planned 2023 programme. Belfast hosted the 2015 Tall ships attracting 520,000 visitors with a direct economic impact of £17 million and a total social media reach of 72 million.
3.24	<p>The request at this stage is approval for officers to pursue discussions with the respective event organisers and other partners. Updates will be provided to Committee at key points before progressing to any formal bidding stage.</p>
3.25	<p>From our previous engagement with the event organisers, we understand that one of the key decision-making factors in the process for identifying the location for the Fleadh Cheoil is the commitment of that town or city to invest in musical development and culture. Like most of the major events, this will require significant collaboration with local partners that have a direct delivery role in this field. The organisers will take a view of the vibrancy and</p>

	<p>commitment of partners in the local scene as well as key investments to support music and cultural development. Members will be aware that, for the last two years, the council has supported the “Gradam Ceoil” music event – widely regarded as the Oscars for Irish traditional music. The event has taken place at the Belfast Waterfront and has had a full house on both occasions, bringing more than 1500 audience members and musicians to the venue. The event is broadcast live on TG4 and online and generated viewing audiences of close to half a million people. The television coverage included extensive footage of the city of Belfast, including profiling some of the key landmarks and telling the story of the musical heritage of the city. The live event has also involved some iconic performances from local musicians including Field Marshall Montgomery Pipe Band as well as input from local actors including Ian McElhinney and Stephen Rea. The inaugural Belfast event was attended by President of Ireland, Michael D Higgins. In addition to the main event, a number of fringe events took place in locations across the city including St George’s Market, Duncairn Centre and Linenhall Library.</p>
3.26	<p>The organisers are currently finalising the application process for the 2020 Awards which are planned to take place in Belfast in February 2020. In order to support the UNESCO designation process as well as the engagement process around the potential future hosting of the Fleadh Cheoil in Belfast, it is proposed that the Council provides financial support to the event organisers. Funding will also be provided by NI Screen and the Department for Foreign Affairs in Dublin. The financial ask from Belfast City Council is £50,000. This is in line with the funding allocated for previous events.</p>
3.27	<p><u>Visit Belfast and Grand Opera House engagement</u></p> <p>Members will be aware that representatives from the Grand Opera House (GOH) recently attended the Committee to advise of their planned renovation scheme which will mean the temporary closure of the venue from January 2020 for a period of almost a year. In order to maintain their box office service for events from 2021, the GOH management have asked Visit Belfast if they could rent a space within Visit Belfast for a temporary period of around 12 months from January 2020.</p>
3.28	<p>The Visit Belfast team have advised that they are able to provide a desk space in the middle section of the Visit Belfast Welcome Centre. The counter space has good synergy with the other box office and ticketing services provided by Visit Belfast, and will help enhance the offering to visitors and drive further footfall to the centre. Visit Belfast has been working with the council’s Estates Management Team regarding this proposed arrangement and they</p>

	<p>have sought and received landlord approval for the proposal. If approved, this agreement will generate an additional income for Visit Belfast. GOH will be responsible for all works to accommodate the move. It is proposed that the Committee provides approval to enter into a temporary sharing arrangement between the council (as the tenant), Visit Belfast and GOH.</p>
3.29	<p><u>UEFA Super Cup - update</u></p> <p>Members may be aware that, at the end of September, UEFA announced the 2021 Super Cup final would take place in Windsor Park. The Super Cup involves the winners of the Champion's League and the Europa League in the preceding season. A further report on the event will be brought to a future meeting of the Committee, outlining more detailed plans and any associated funding requests from the council.</p>
3.30	<p><u>Financial & Resource Implications</u></p> <p>The cost of a comprehensive visitor experience plan for the city is estimated at up to £80,000.</p>
3.31	<p>A 5 year plan and programme for the Maritime Festival requires an investment of £50,000 from Council at this stage with a further £30,000 leveraged from city partners. Both of these costs are to be met from existing departmental budgets.</p>
3.32	<p>At this point, there is no financial ask for any of the major events identified in this report. The only financial ask is for £50,000 towards the hosting of Gradam Ceoil in February 2020. This as above, is to be met from existing departmental budgets. Future reports will be brought back to this Committee with recommendations for investment in any of the major events identified. Costs associated with hosting events of this scale have been considered as part of the overall growth plan for the new cultural strategy.</p>
3.33	<p>There are no financial implications for the Council of the arrangement between VB and GOH.</p>
3.34	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>These actions are directly aligned to the priorities set out in the cultural strategy. This strategy has been subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). Further investment will include equality screening as appropriate.</p>
4.0	Appendices
4.1	N/A