



BUSINESS PLAN

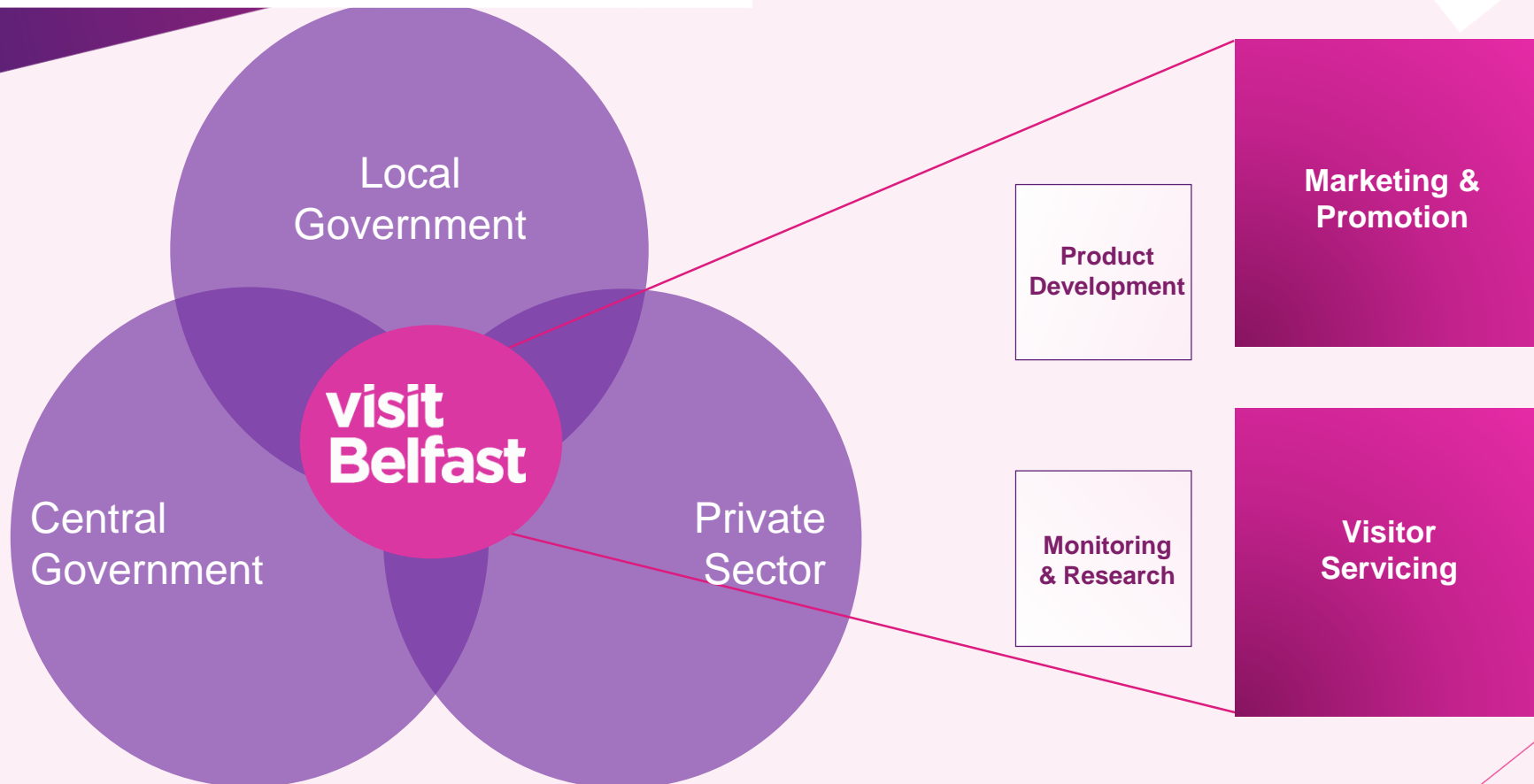
2020/21

20 Years Inspiring Visitors

visit
Belfast

20
YEARS
INSPIRING
VISITORS

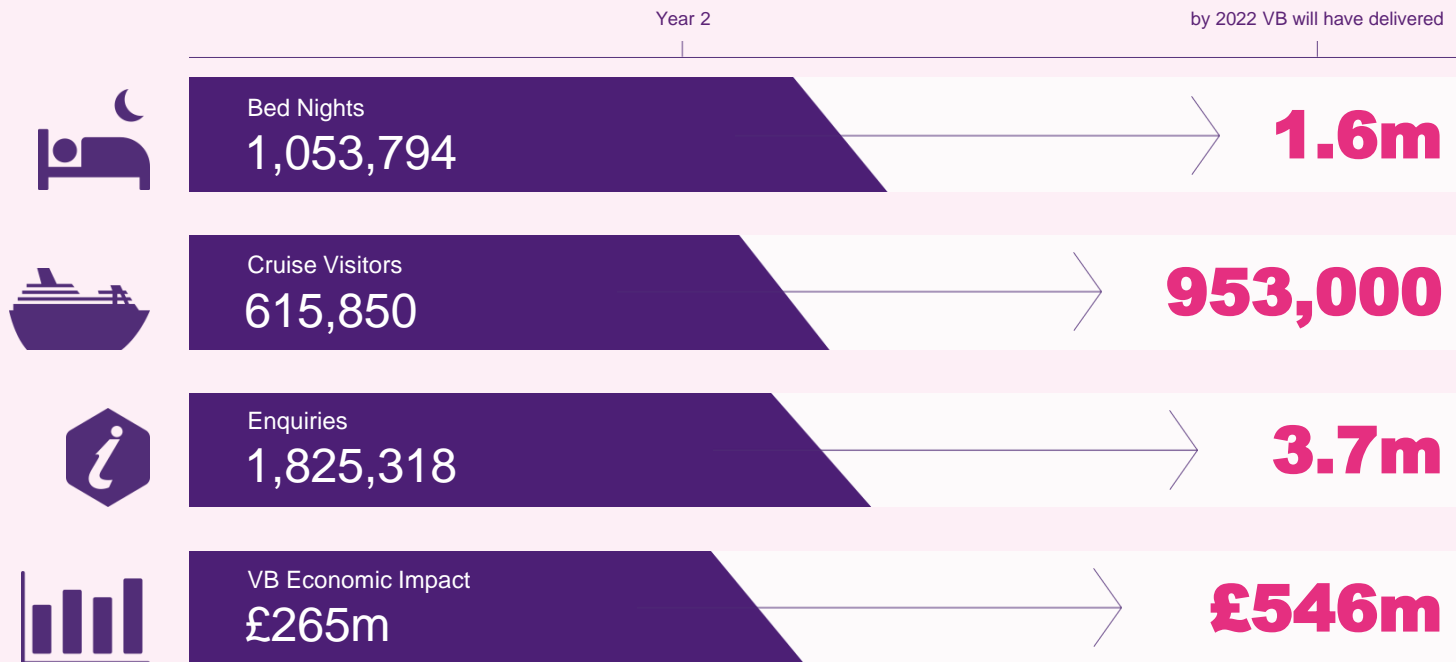
Visit Belfast Role & Remit



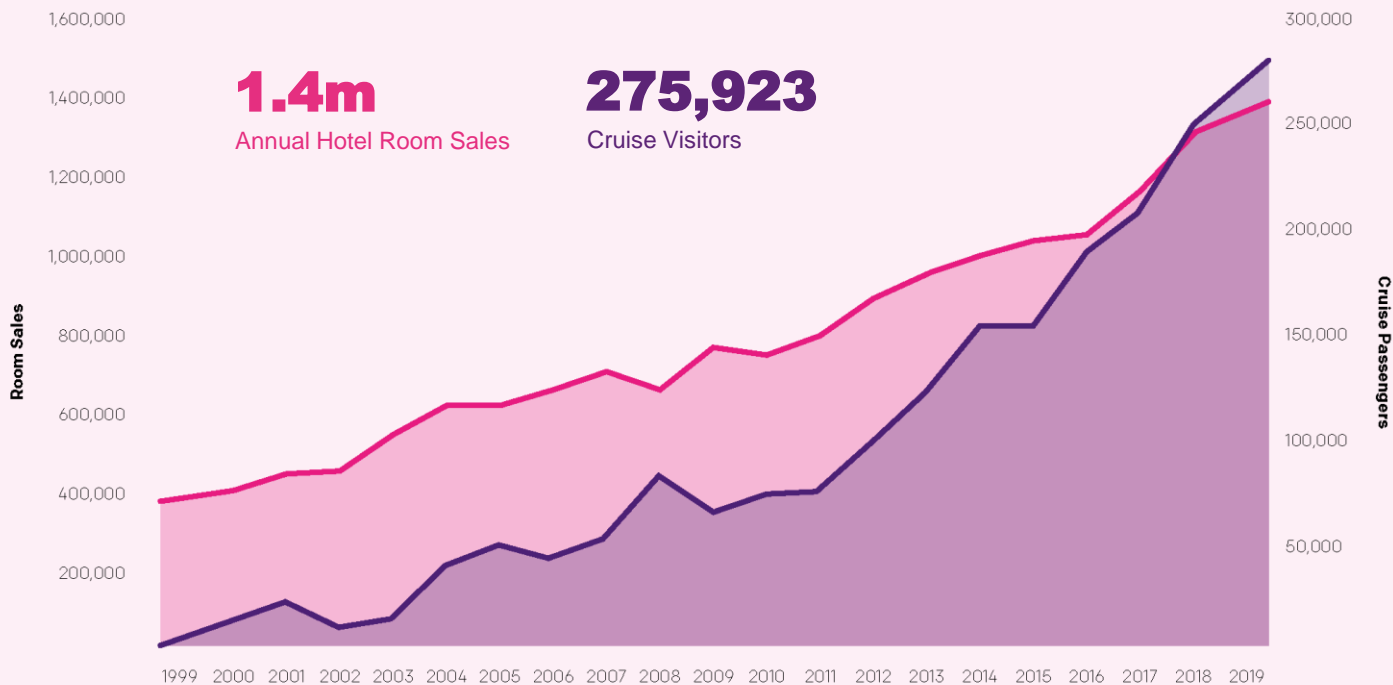
Visit Belfast Board

Andrea Hayes	Airline	Michael Williamson	ASM Belfast
Catherine Toolan	ICC Belfast	Rajesh Rana	BCTC
Harry Connolly	Fáilte Feirste Thiar	Norman Maynes	Translink
Howard Hastings	Hastings Hotels	Paul Grant	Stena Line
Isabel Jennings	QUB	Robert Davis	Wine Inns
Ivan McMinn	Danske Bank	Cllr Fred Cobain	Cllr Eric Hanvey
Judith Owens	Titanic Belfast	Cllr Paul McCusker	Cllr Séanna Walsh
Kathryn Thomson	National Museums NI	Observers: John Greer, BCC Lisa Toland, BCC John McGrillen, Tourism NI	
Mark Walker	Hilton Hotels		
Michael Robinson	Belfast Harbour		

On Target with our 4 Year Strategy



Belfast Tourism Journey



1.7m
OVERNIGHT TRIPS



£395m
OVERNIGHT
TOURISM SPEND



19,000
JOBS

2015 to 2019 Tourism Growth



OVERNIGHT
TRIPS

+27%



OVERNIGHT
TOURISM SPEND

+45%



HOTEL ROOMS
SOLD

+35%



CRUISE
PASSENGERS

+136%



CONFERENCE
DELEGATES

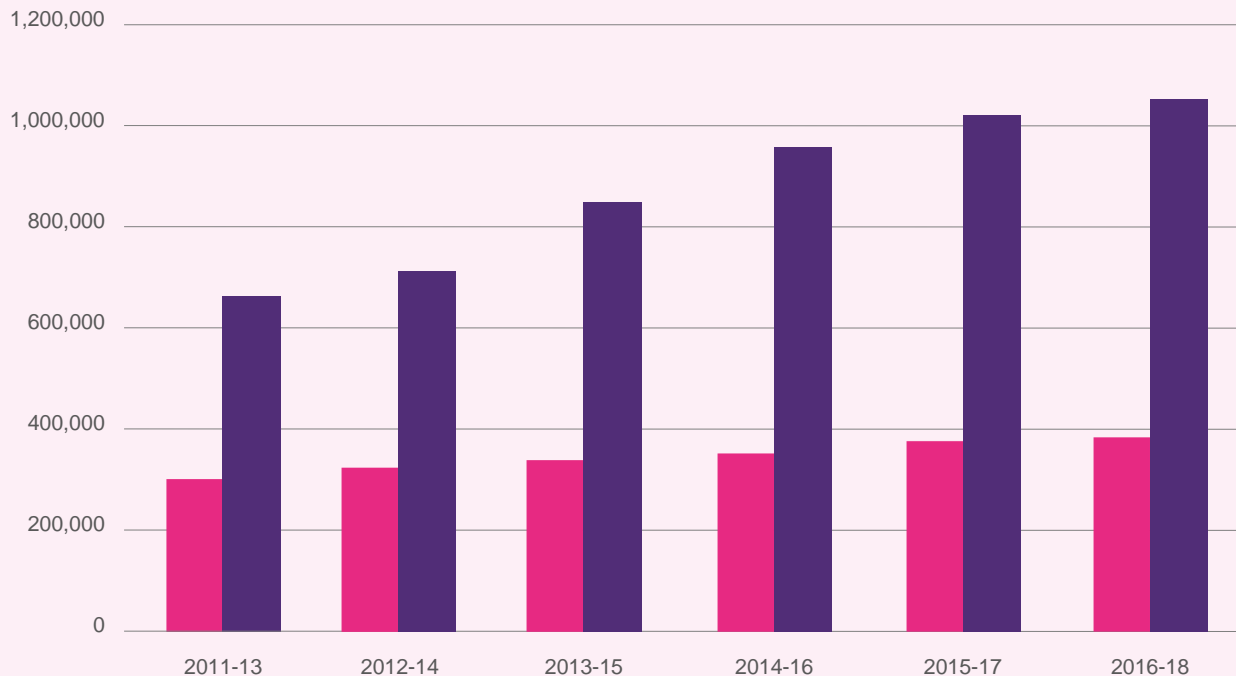
+43%



VISITOR ENQUIRIES
HANDLED

+40%

Out of State Visitors: Driving Tourism Growth



OoS Visitors
+60%

Domestic Trips
+6%

Belfast generates
50% of OoS
tourism spend to
Northern Ireland

Growth Potential Remains High

Tourism Expenditure as % GVA

£500m
11,000 jobs

NI

2.3%

ROI

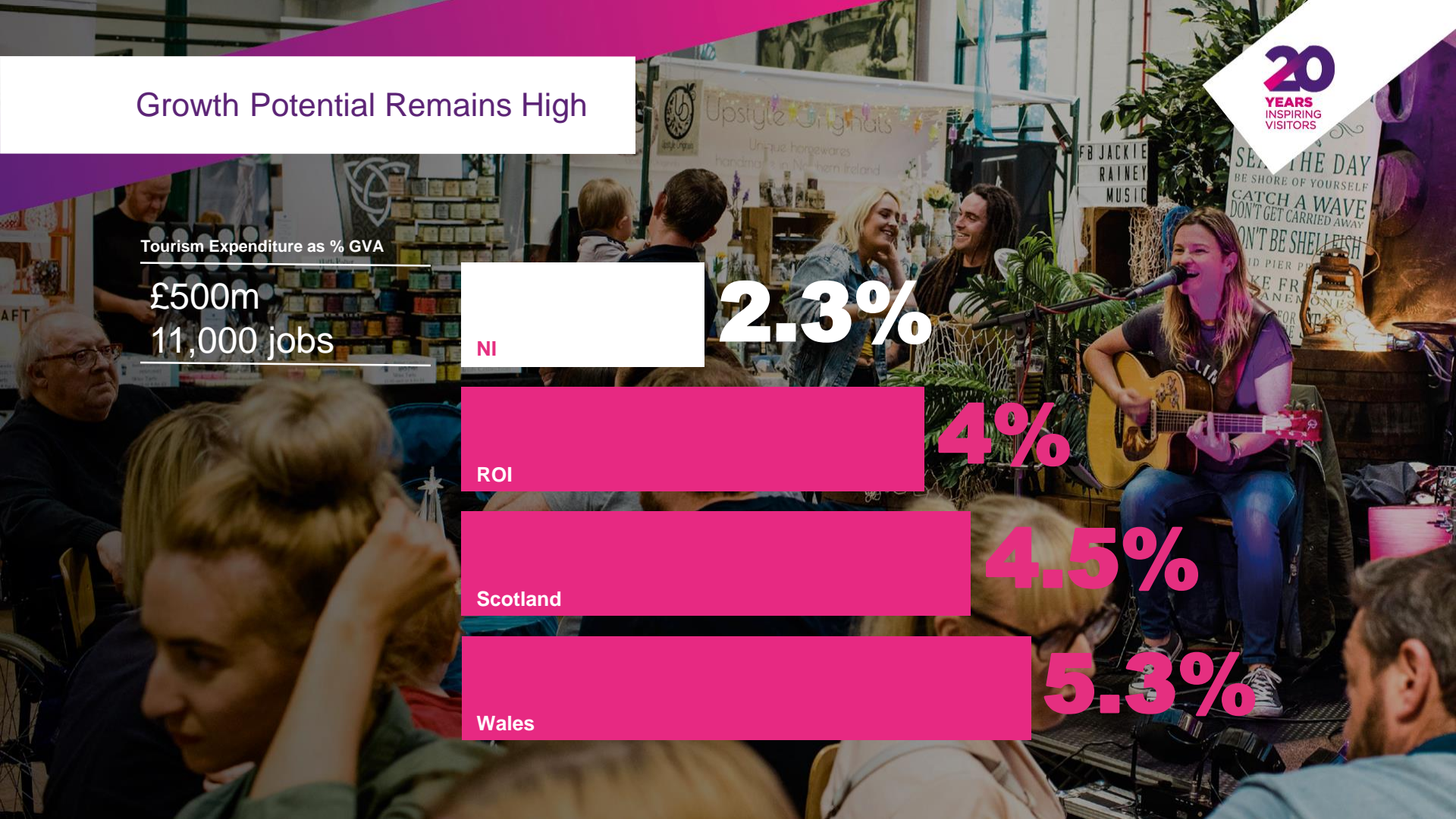
4%

Scotland

4.5%

Wales

5.3%



The Market Opportunity

City Breaks

GB: 72m outbound visits in 2018
ROI: 11.5m o/n trips taken in the Island of Ireland
Europe: 31m direct access addressable audience

MICE

C&IT Best Events Destination 2019
Over 1,200 local ambassadors
302 conference opportunities £351.6m

Cruise

129 ships to arrive in 2020, bringing 305,000 cruise visitors
350,000 cruise visitors by 2021
Dedicated Cruise Welcome: 2019 Cruise Critic Editor's Pick Award

Policy Context

- **The Belfast Agenda**
Belfast Community Plan 2018-35
- **Belfast Inclusive Growth Strategy**
- **Belfast Resilience Strategy**
- **Belfast Region City Deal**
- **Local Tourism in Belfast**
Developing the Offer
- **A City Imagining**
Belfast's Cultural Strategy for 2035
- **Northern Ireland Tourism Strategy**
Draft TNI / DfE Strategy
- Belfast Harbour
A Vision to 2035
- **Recommendations on Sustainable Development of Indigenous Tourism (WTO)**

Belfast Agenda: sustainable, inclusive growth



**2021-22 Visit Belfast activity
will deliver:**

403k
BED NIGHTS

392k
CRUISE VISITORS

949k
VISITOR ENQUIRIES

£143m
ECONOMIC IMPACT

Operating Environment / Challenges

5,000 Hotel
Rooms

Brexit

Destination
Lifecycle

City &
Region

Responsible
Tourism

Smart
City

Skills

Access

Economic
Slowdown

Sustainability

Coronavirus

Visit Belfast Strategic Objectives

Increase
overnight/
day visitors
and spend

Repeat
visits and
visitor
satisfaction

Spread the
benefits
of tourism
across the
city region

Championing
the Belfast
Destination
Brand

Visitor Focus

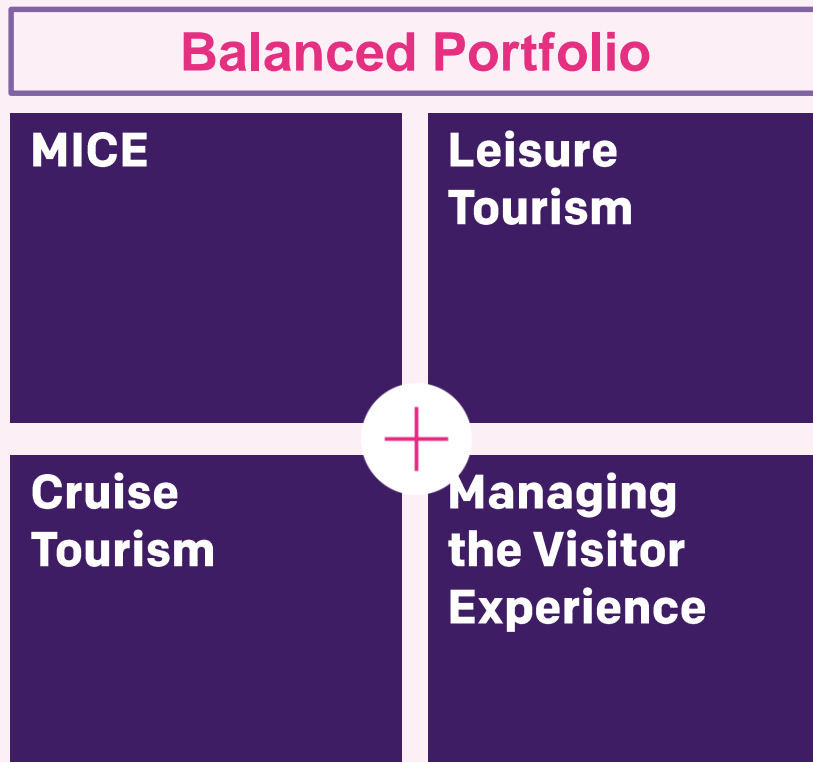
Leverage

On Brand

Partnership

Flexibility

Growth Strategy



=

Integrated,
coordinated
planning and
delivery

**£546m
economic
impact**

Marketing Touch Points



Culture



Food & Drink



City of Music



Home of Thrones



Maritime



Belfast Destination Hub



Conference City



Belfast Plus



Cruise Belfast



Off the Beaten Track



Neighbourhood Tourism



City of Stories



Events & Festivals



LGBTQI+

Sustainable Tourism

Tomorrow's Tourists Care: visitors are choosing destinations that are demonstrating a commitment to a zero carbon footprint – attract tourists who care

Global Destination Sustainability Index: benchmarking & improvement programme for MICE destinations

Industry / Agency Action: review existing sustainability practices, acknowledge tourism sector's current contribution toward a zero carbon economy; and actively push reduction, reuse & recycling

Promote *Bleisure*: one trip that combines business & leisure

Expert Visitor Management & dispersal: off the beaten track

Focus on Community Tourism: providing tangible social & economic benefit across the city

Marketing & Communications

- **City Breaks**
Explore more and repeat visitors
- **GB & ROI Market Focus**
Culturally Curious, Family
- ***Bleisure* Travel**
Extending delegate stays
- **Digital Transformation**
User experience at the forefront
- **Expand Partner Engagement**
- **Destination Brand & PR**



250,000
BED NIGHTS



£38m
ECONOMIC
IMPACT



20
YEARS
INSPIRING
VISITORS

Business Tourism

- Ambassador Programme Review
- Business Development Taskforce
- 2020-30 Business Tourism Strategy
- Global Destination Index
- Segments
Associations, Agencies, Corporate,
PCO, Ambassador & Incentive


100,000
BED NIGHTS


£60m
ECONOMIC
IMPACT



Business Tourism Performance

- **2019-20: 93 conferences**

25,264 delegates generating 74,528 bed nights and £34.1m economic benefit

Looking ahead:

- **124 conferences confirmed as far ahead as 2027**

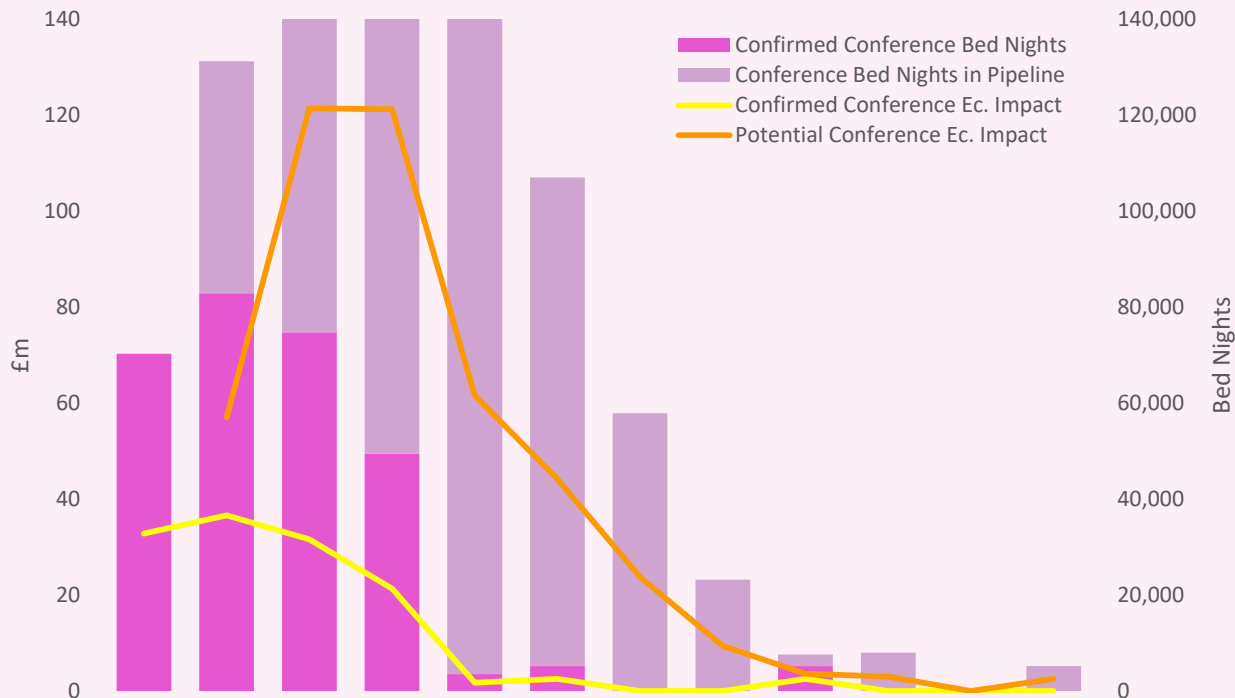
62,781 delegates expected to generate 221,075 bed nights and £96.2m economic benefit

- **302 conference opportunities as far ahead as 2030**

worth a further 823,530 bed nights and £351.6m

This conference picture constantly changing

Business Tourism Pipeline



	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030
Conferences Pipeline 2020 onwards	92	108	127	104	40	25	15	3	2	1	-	1
Potential Economic Impact (confirmed + pipeline)	£32.8m	£57.0m	£121.5m	£121.3m	£61.6m	£44.2m	£23.7m	£9.4m	£3.6m	£3.0m	-	£2.5m

Travel Trade Development

Important & growing segment: for VB partners

New Trade-friendly product: film, local / neighbourhood tourism etc.

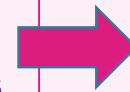
Destination Expert: POC for operators programming Belfast

Lead Generation: service enquiries, travel trade training / webinars, sales calls, in-market sales missions, trade-shows & events

Partnership with TI & joint planning with TNI

Market Prioritisation:

- ✓ ROI, GB & North America
- ✓ **Europe T1:** Germany, Austria, Switzerland & Netherlands
- ✓ **Europe T2:** Spain, Italy & Nordics



175
LEADS

Visitor Servicing

- **3 VICs**
City Centre, George Best Belfast City & Belfast International Airports
- **Cruise Welcome Hub**
- **Outreach**
Ambassadors, events & key attractions
- **Industry Engagement / Volunteer Programme**


916,000
ENQUIRIES


£19m
ECONOMIC IMPACT

Visit Belfast Visitor Servicing Focus

- Encourage repeat visitors
- Internationalisation
- Visit Accessibility



Cruise Ship Servicing 2020

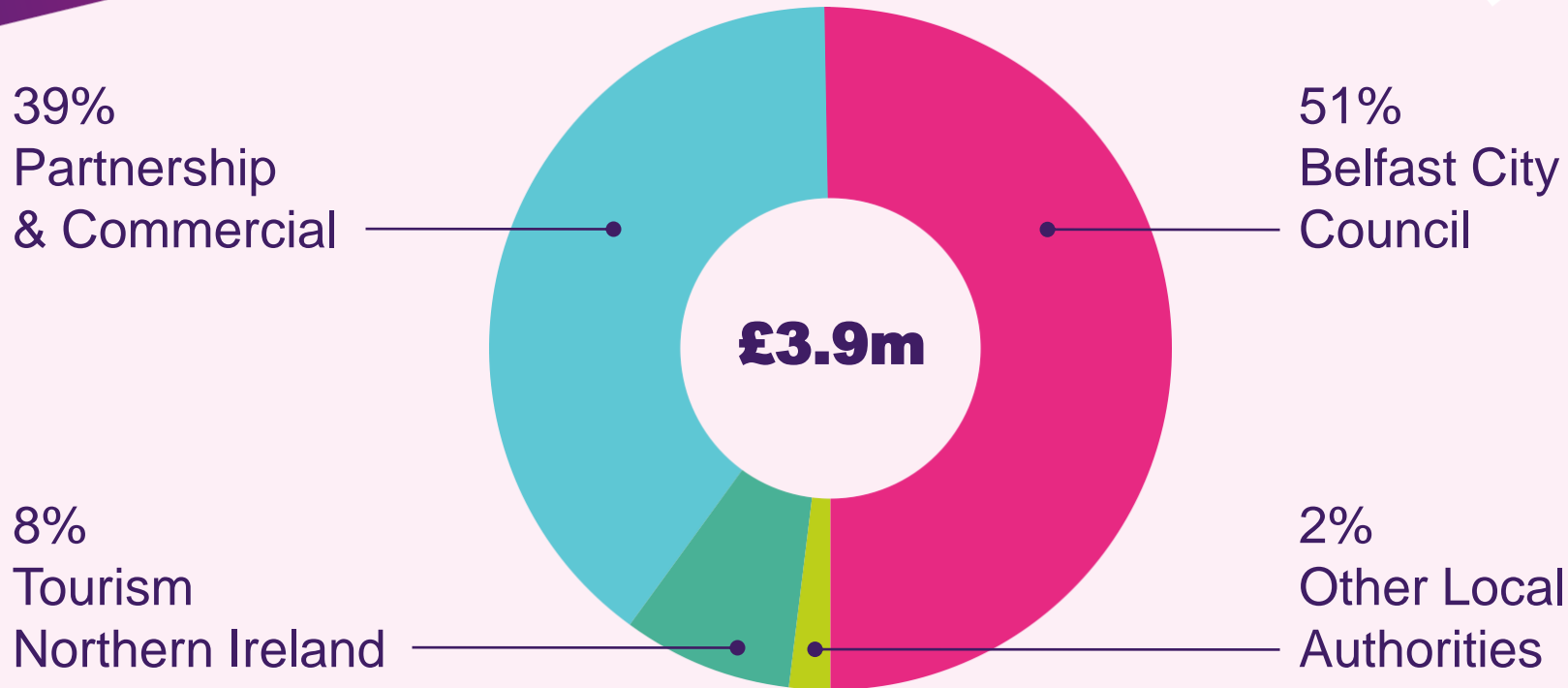
**Between
1 March to 31 October**

- 129 ships
- 305,844 cruise visitors
- £13.9m spend

64 ships staying past 8pm
7 cruise days with 2 ships
4 cruise days with 3 ships
32 ships in May w/ 68,911 cruise visitors



Operating Budget



Visit Belfast 2020-21 Outputs



350k
BED NIGHTS



350k
CRUISE VISITORS



916k
ENQUIRIES



£123m
VISIT BELFAST
ECONOMIC IMPACT

Supporting and Sustaining 2,800 jobs
£1:31 return on investment

In Summary

- **Challenging Operating Environment**
 - Flexibility & Agility Required
- **Tourism Growth**
 - Supporting city resilience
 - Supporting an inclusive & sustainable economy
- **Focus**
 - Building the Destination Brand
 - City Breaks, Conference & Cruise
- **On Track to Deliver 4-Year Targets**

Visit Belfast

- Value for Money
- Output focussed Delivery Vehicle
- BCC leverage £1 to 75p
- ROI £1:£61.50