



Subject:	Tourism Update – 10 year plan
Date:	9 December 2020
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	At a meeting of City Growth and Regeneration Committee in August 2020, it was agreed that a ten year tourism plan for Belfast would be developed. The purpose of this report is to update Members on the current status of the plan and direction of travel in advance of a full draft being presented in March 2020 for consideration and subsequent public consultation.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> - Note the contents of this report and agree the current direction of travel for the emerging ten year tourism plan.
3.0	Main report
3.1	<p>Members will be aware that at a meeting of City Growth and Regeneration Committee in August 2020 it was agreed that a new ten year tourism plan was to be developed. The purpose of this plan is to:</p> <ul style="list-style-type: none"> - Deliver on the tourism priorities set out in the <i>Belfast Agenda</i> recognising the importance of tourism to <i>Growing the economy</i> and <i>City Development</i>. - Align to the ten-year cultural strategy, <i>A City Imagining</i>, in order to ensure that tourism development supports cultural development and is based upon an authentic and sustainable Belfast offer. - Support economic and social recovery in the context of COVID-19 including stabilisation, recovery and growth with the opportunity to build back better. - Provide strategic context to the Belfast Region City Deal that sets out wider city priorities to ensure Belfast's appeal internationally and ability to attract out of state visitors.
3.2	<p>Tourism Growth Pre Covid-19</p> <p>In August 2019 Belfast City Council agreed a new ten year cultural strategy, <i>A City Imagining 2020-2030</i>, to drive transformation in the city. For the first time, the scope of this strategy brought together under one compelling vision a number of areas including tourism, culture, heritage, arts, events and festivals.</p>
3.3	<p><i>A City Imagining</i> acknowledges that whilst Belfast has enjoyed relative growth in tourism over recent years that in turn has supported regional development, it is necessary to continue to support sustainable tourism development and job creation. Belfast's first community plan, the <i>Belfast Agenda</i>, also articulates the importance of delivering a culturally vibrant city both for residents and visitors as well as acting as an attractive driver for inward investment. It is anticipated that citywide investment in a culturally vibrant place will support changing perspectives of Belfast as a place to visit, live, work and invest. In order to continue to build on the value of out-of-state tourism and welcome more overnight stays in our visitor accommodation it is essential that we collaborate with our tourism sector to evolve, broaden, deepen and expand the tourism offer currently available in Belfast.</p>

3.4	<p>Despite significant growth and the success of flagship projects such as Titanic Belfast there is still a gap in scale and maturity of the local industry when compared with other regions. Notably, Northern Ireland lags behind UK regions and Republic of Ireland with respect to tourism as a driver for job growth. However the positive trajectory in place before Covid-19 had identified tourism growth as both feasible and a necessary part of inclusive economic growth. The challenge of any tourism development plan will be to create a sustainable model that continues to support the growth that is essential for city success and the creation of jobs.</p>
3.5	<p>Belfast tourism and hospitality sectors directly supports 19,300 jobs, one third of the sector in Northern Ireland. Key tourism sectors such as Accommodation & Food Services, Arts, Entertainment & Recreation and Transportation will be impacted by COVID-19 however if Belfast's recovery from the pandemic is managed then the growth potential remains high. The hospitality sector is an employment-intensive one, supporting a disproportionate number of jobs compared with the average sectoral GVA: jobs ratio. Between 2013 and 2019 employment in Accommodation and Food Services in Belfast increased by 18.2 percent, compared with 8.5 percent growth in the city's total employment.</p>
3.6	<p>It was in this context that Tourism NI set the ambitious target of doubling the value of the tourism industry to £2 billion by 2030. A key element of this opportunity further reinforced by ambitions of the Belfast Region City Deal was getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region.</p>
3.7	<p>Impact of Covid-19</p> <p>While the full impact of Covid-19 is as yet unknown what is clear is that recovery will require new and innovative approaches in an increasingly competitive market. As the regional driver, Belfast will be hugely significant to this growth ambition, both in terms of visitor spend and the creation of new jobs. It is therefore imperative that our city break destination is developed in a strategic way which maximises the economic benefits which can be derived from tourism for local industries, businesses and communities, as well as increasing visitor numbers and spend and improving overall satisfaction levels.</p>
3.8	<p>In advance of the development of the tourism plan, Ernest and Young were commissioned to assess the potential impact of COVID-19 on the city. The report recognises Belfast's role in regional tourism:</p> <ul style="list-style-type: none"> - Belfast is an important attractor for international, high value tourists to the region.

- Belfast's share of out of state tourism spend has been significantly higher than the NI-wide share (83% v 72%).
- Spending by tourists in Belfast has outpaced the NI average, growing by 20% year on year compared to 4.5% regionally.
- Belfast has grown at a faster rate than the rest of NI mainly because of its attractiveness in two high value markets – city breaks and business tourism.

3.9 The report also sets out a number of scenarios depending on the length of the pandemic and recovery trajectory. The most protracted scenario estimates that job losses could be as significant as 5,500 in 2020 and continuing into 2021, 2022 and beyond. From this report there are a number of short term actions aligned to Tourism NI's work, including more effective reach into all-island and GB markets and the need for a more flexible approach to supporting tourism businesses through the crisis. However below is set out a series of recommendations specific to Belfast and need for stabilisation, recovery and longer-term growth.

3.10 **Develop tourism supply in Belfast to foster a sustainable economic model creating jobs and improving local quality of life**

1. Bring forward renovations or upgrading of tourism facilities during quiet time to support the economy and improve the quality of the tourism offer in Belfast.
2. Pursue planned City Deal investments following a dynamic model based on regularly updated visitor numbers and visitor behaviours.
3. Focus on the development of resilient tourism attractions (e.g. mix of outdoor and indoor spaces, online content, attractive to locals) and mitigate the impacts for the most impacted sectors (e.g. business tourism).
4. Launch a wide consultation with key stakeholders and locals regarding the role tourism should play in a city like Belfast (e.g. urban regeneration, housing, sustainability, jobs, social inclusion, international attractiveness).
5. Identify ways for Belfast or specific attractions within the City to be distinguished internationally (e.g. awards, UNESCO, travel guides).

3.11	<p>Developing a ten-year plan</p> <p>The emerging ten-year tourism plan has taken into consideration these initial recommendations alongside the existing commitments outlined in the Cultural Strategy that identified the four areas where Council could make the most difference:</p> <ul style="list-style-type: none"> - Increasing the coherency of the Belfast experience - Supporting quality authentic product - Developing skills - Improving how the city is marketed
3.12	<p>The approach</p> <p>The past two decades have given rise to a number of trends within tourism development. This has included the popularity of approaches such as cultural tourism, green tourism or local tourism. What each of these approaches and associated models have in common is an increasing awareness that sustainable forms of tourism must respect the local context and support the economic, social, environmental and cultural values of a place.</p>
3.13	<p>This ultimately leads to a more circular model. In the context of Belfast, even before COVID-19, this is a complex proposition. The city requires further growth with a clear international agenda and need to continue to attract and grow out of state visitors. The new 10 year tourism plan seeks to set out how this growth can be achieved in a sustainable and inclusive way recognising that the city's greatest asset is its people.</p>
3.14	<p>The plan will set out a shared vision for tourism in the city and will be supported by 4 strategic themes and a number of catalyst projects. The draft strategic themes are:</p> <ul style="list-style-type: none"> - Grow Belfast - Experience Belfast - Position Belfast - Sustainable Belfast
3.15	<p>Each theme is supported by an evidence based body of work and research.</p>
3.16	<p><i>Strategic theme 1: Grow Belfast</i></p> <p>This theme will focus on the role of tourism in city recovery including the need for stabilisation of the tourism sector and the requirement for further growth in Belfast. This will include:</p>

- Strategic context and evidence based proposition that Belfast acts as a catalyst for the region.
- Measurement of the attractiveness of the city as a destination and how this plays a key role in maximising the economic impact of each visitor by increasing average length of stay and daily spending levels.
- Priority areas for investment e.g. catalyst projects.
- Broadening of economic measures to include areas such as brand value.
- Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.
- Clear advocacy position on key challenges e.g. air access or visitor levy.

3.17 *Strategic theme 2: Experience Belfast*

Included within the ten year plan will be an interpretive development framework for tourism in Belfast that will:

- include experiences that can be brought to life through the development of an optimal mix of 'anchor' and ancillary products that get people into an area and keep them there
- focus on encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places.
- be about delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.

3.18 How we will do this?

- Complete a mapping exercise which maps our existing tourism assets against the city's 'Belfast brand' and Tourism NI 'Embrace the Giant Spirit' brand.
- Assessment of quality, market fit and sustainability of existing products.
- Develop a combination of thematic and geographical clustering.
- A gap analysis of potential experience based products. The gap analysis should review what is missing from the tourism offer generally taking into consideration issues such as seasonality, immersive experiences, events and festival animation, and opportunities to meet local people for instance.

3.19 *Strategic Theme 3: Position Belfast*

A critical dimension to any tourism development plan is understanding the market and how the brand operates in this space. In order to develop an effective strategy there also needs to be consideration of the brand architecture for the city and the region. The result should

be clarity of roles and responsibilities for agencies working in this field including Council's own role and city partners such as Visit Belfast and Tourism NI. The ten year plan will set out a dynamic model for city positioning that can respond to key markets including:

- Business Tourism and sub-sectors within this group.
- Leisure tourism target markets including - geographic considerations and the visitor journey.
- Belfast's position as a gateway destination.

3.20

This theme will also take forward a new approach that pushes beyond traditional marketing methods towards enabling the people creating the Belfast experience to tell their story. Therefore the approach will be narrative driven and the new plan will set out areas of support on:

- How do we tell Belfast stories? How do we enable people to tell their Belfast story?
- How do we create an emotional connection with visitors?
- How do we make local stories resonate internationally?

3.21

This plan will bring forward actions that support an effective way a working outlining how:

- Branding is about relationship. Communications requires dialogue moving away from single direction channels.
- It's no longer about a digital revolution, data is what drives the visitor economy.

3.22

Strategic theme 4: Sustain Belfast

This theme will be driven by recommendations emerging from the benchmarking completed as part of Global Destination Sustainability Index. Members will be aware that Belfast signed up to this benchmarking following Committee approval in August 2020. The Global Destination Sustainability Index is the world's leading benchmarking and performance Index for cities, their events and their visitor economy. Its purpose is to engage, enable and inspire cities to become more sustainable places to visit, meet and thrive in. In addition to benchmarking a city's environmental strategy and social sustainability performance, the GDS-Index assess criteria that are industry specific: industry supplier support (restaurants, hotels, conference centres) and convention bureau strategy and initiatives. Alongside benchmarking it helps destination management organisations, convention bureaus, key industry associations suppliers and clients to develop effective strategies and practices in support of sustainability goals.

3.23	<p>Since 2019, over 60 cities have started the process of benchmarking and assessment. The goal is to have 300 cities collaborating by 2023. The Index is based on 69 Indicators broken down into four categories:</p> <ul style="list-style-type: none"> - City Environmental Performance - City Social Performance - Supplier Performance - Destination Management Performance
3.24	<p>Belfast has now completed initial benchmarking and a series of recommendations are in draft form and will be included in the 10 year plan. A number of these relate to Visit Belfast's role as the Destination Management Organisation (DMO). In addition to long-term plans, there are, however several short term recommendations that Council should consider including:</p>
3.25	<p><u>Council assets</u></p> <ul style="list-style-type: none"> - Supporting the ICC (as the city's Congress Venue) to achieve accreditation. - Embed tourism in city emergency planning.
3.26	<p><u>Supporting the supply chain</u></p> <ul style="list-style-type: none"> - Developing a tiered certification strategy for suppliers (this would be in partnership with TNI) and set goals for certification. - Funding support to help / incentivise suppliers achieve 3rd part accreditation - Food sustainability training for suppliers. - Provision of tools and templates to help suppliers create and implement their own sustainability policies.
3.27	<p>All four of these strategic themes will be underpinned by the need to support inclusive economic growth and to differentiate the Belfast offer in an increasingly competitive global marketplace. Therefore a fifth strand to the plan will consider the importance of key strategic opportunities that could bolster investment in the sector in order to support recovery and future growth. These will be catalyst projects or programmes such as:</p>
3.28	<p><i>Cultural Initiatives and Campaigns</i></p> <p>Commitment to long-term initiatives contained in cultural strategy including signature Belfast events, 2023 International Year of Culture and UNESCO City of Music.</p>

3.29	<p><i>Infrastructure</i></p> <p>Delivering the tourism pillar of the Belfast Regional City Deal including Destination Hub focusing on:</p> <ul style="list-style-type: none"> - Commitment to inclusive growth, ensuring the economic benefit of the Belfast Destination Hub development is spread across and connected into the rest of the city. - Commitment to the creation of secure and sustainable employment and skills development. - Commitment to local engagement and participation to ensure that Belfast residents are actively engaged and supported to access opportunities throughout the development and realisation of the project.
3.30	<p><i>Bringing the Belfast Experience to life</i></p> <p>Delivering a long-term fully integrated visitor experience model for the city that includes:</p> <ul style="list-style-type: none"> - Adopting a place-based approach to the development of our neighbourhoods through local tourism framework and investment that supports product development, jobs creation and destination management.
3.31	<p>Next steps</p> <p>A full draft plan will be presented to Committee in March 2021. Subject to approval this plan will then complete a public consultation.</p>
3.32	<p><u>Financial & Resource Implications</u></p> <p>There are no new financial implications. The activities outlined in this report will be resourced from the 2020/21 budget for the Culture and Tourism section of the Economic Development division of the Place and Economy Departmental budget in line with existing approvals.</p>
3.33	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> has been subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). The tourism plan will be subject to a further equality screening.</p>
4.0	<p>Appendices</p>
	<p>None</p>