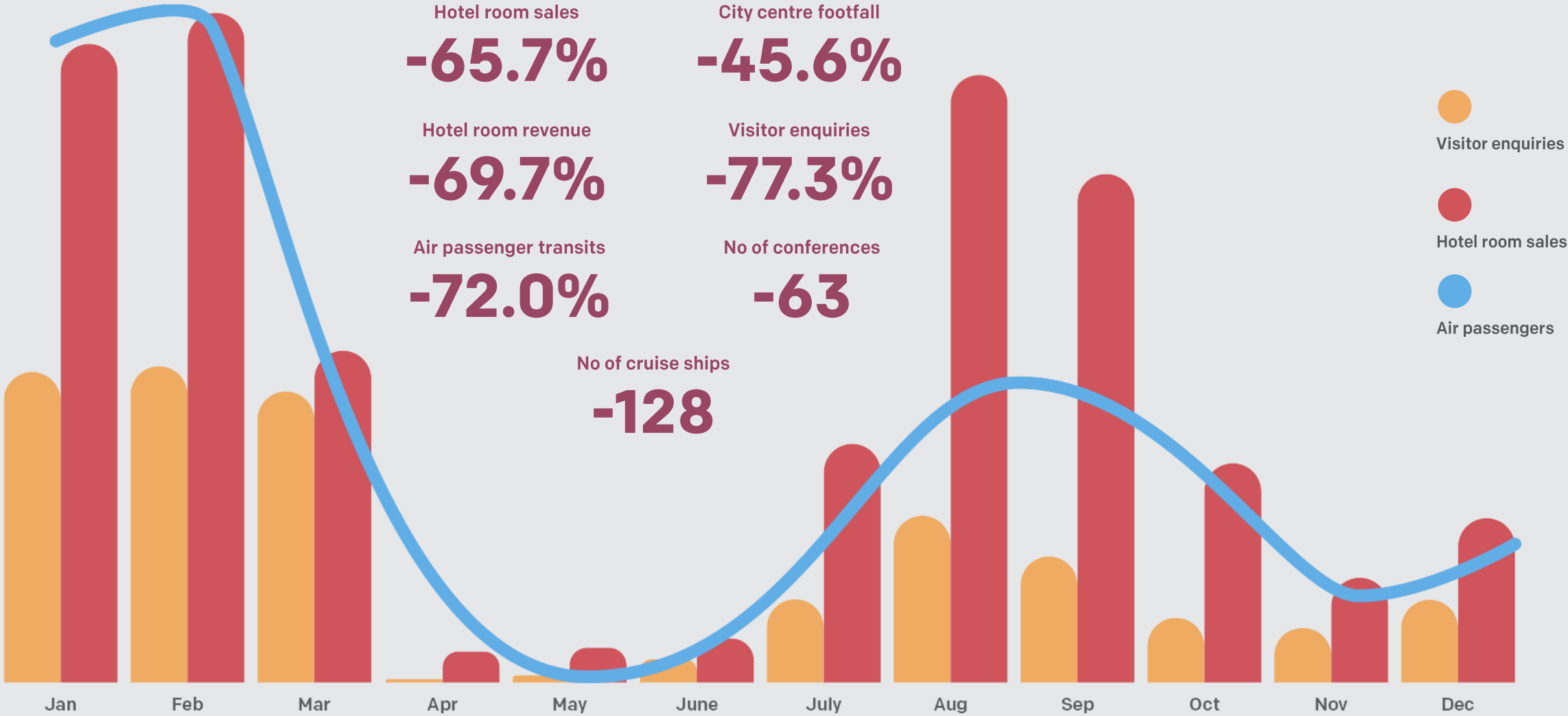




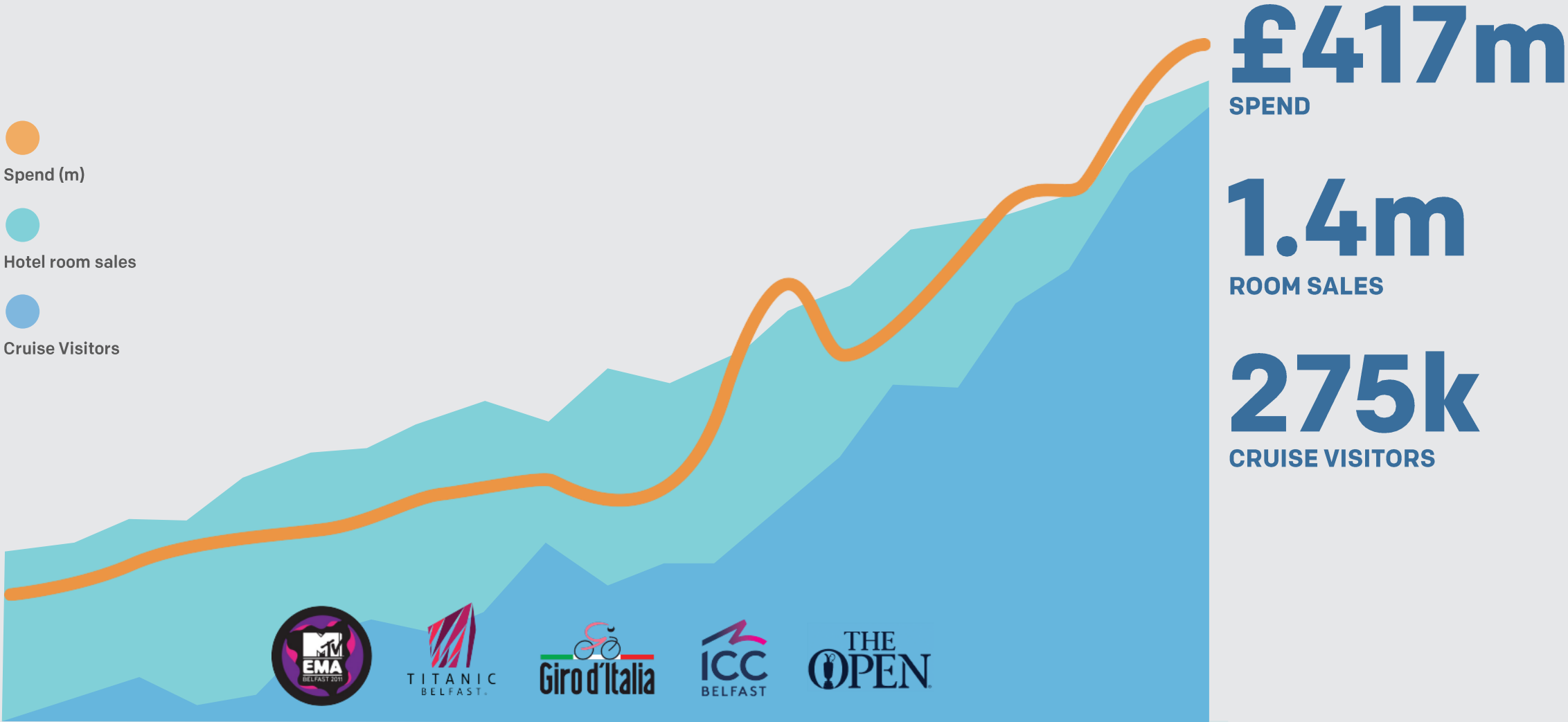
visit Belfast

REBUILDING CITY TOURISM 2021-24

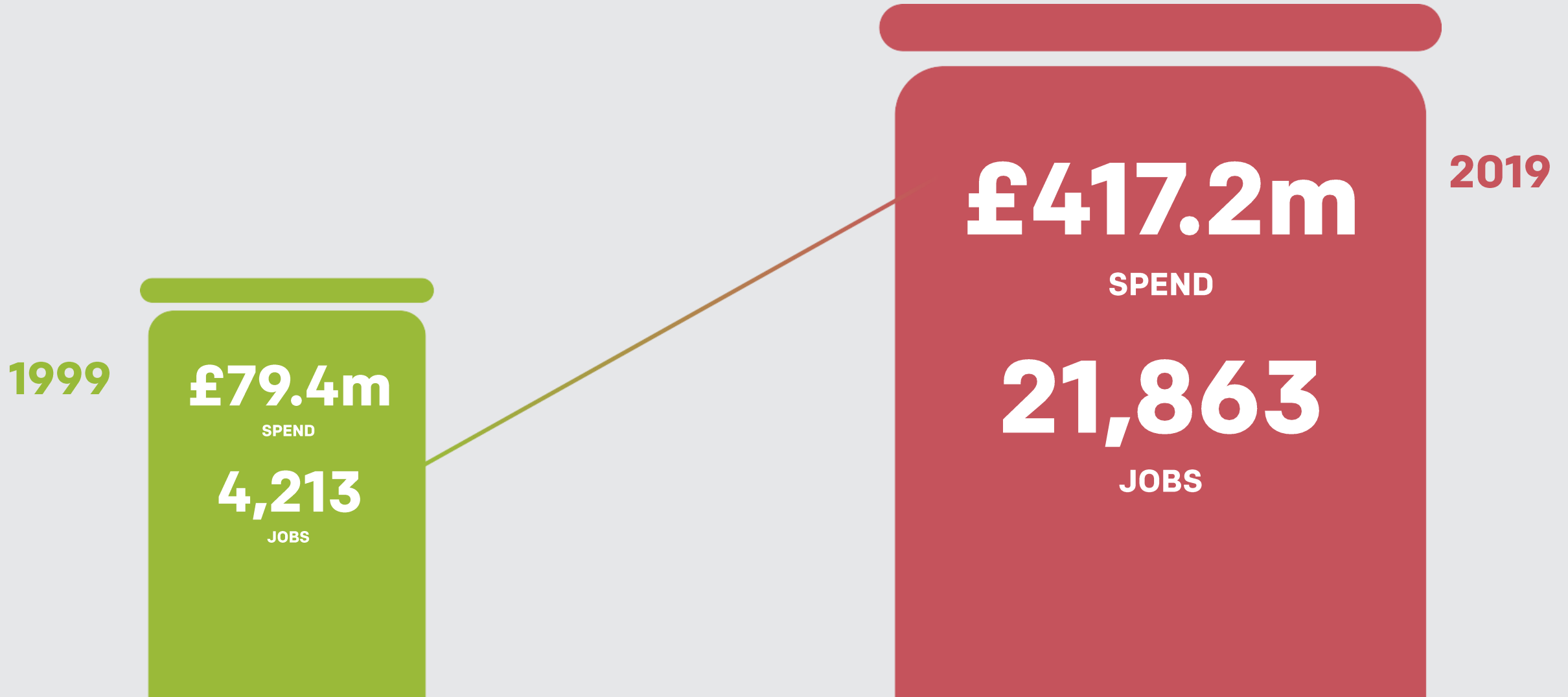
COVID-19: A HAMMER BLOW TO CITY TOURISM



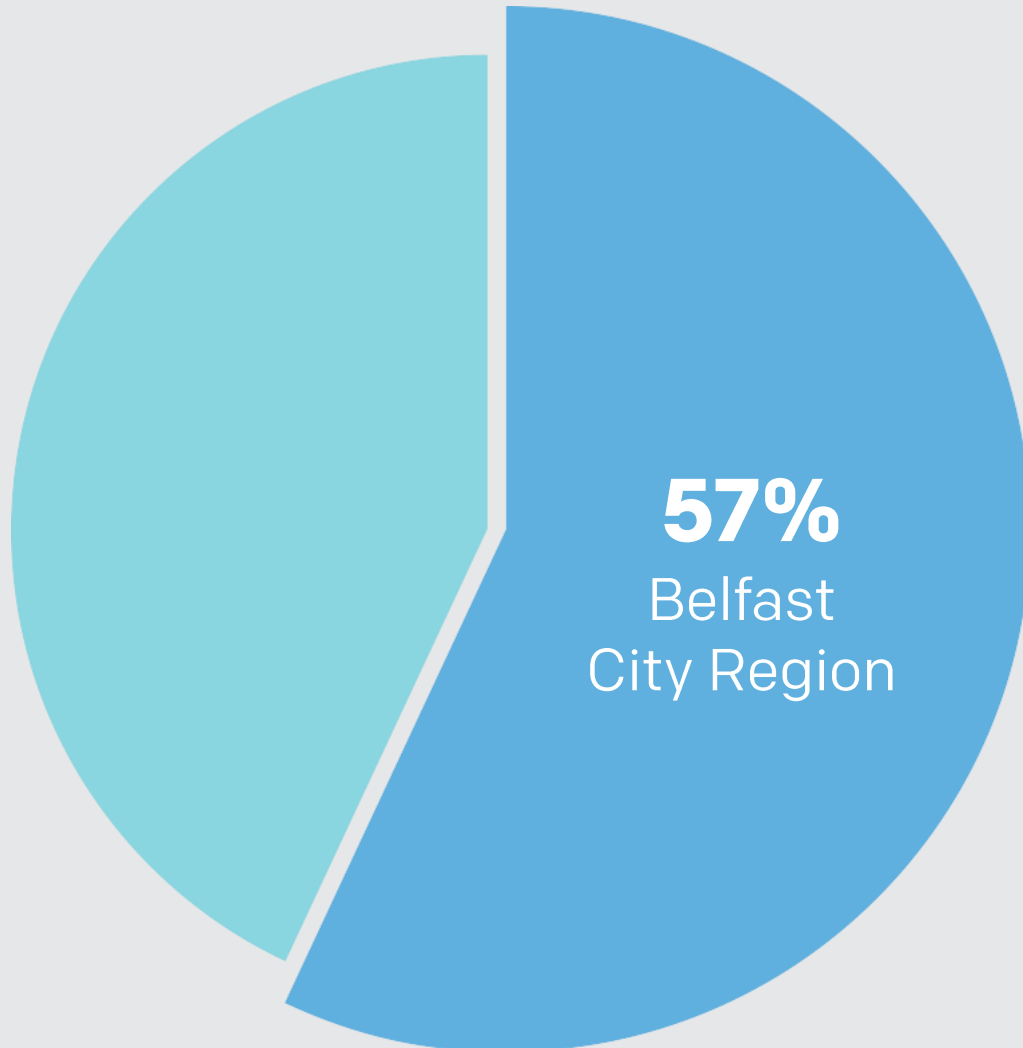
20 YEARS OF CITY TOURISM GROWTH



TOURISM IS A PILLAR OF THE CITY ECONOMY



BELFAST CITY REGION'S STRATEGIC IMPORTANCE



+69% O/n tourism spend in 5 years

56% of OoS tourism spend generated by BCR

45% of NI tourism jobs are in the BCR

84% tourism spend in Belfast is from OoS visitors

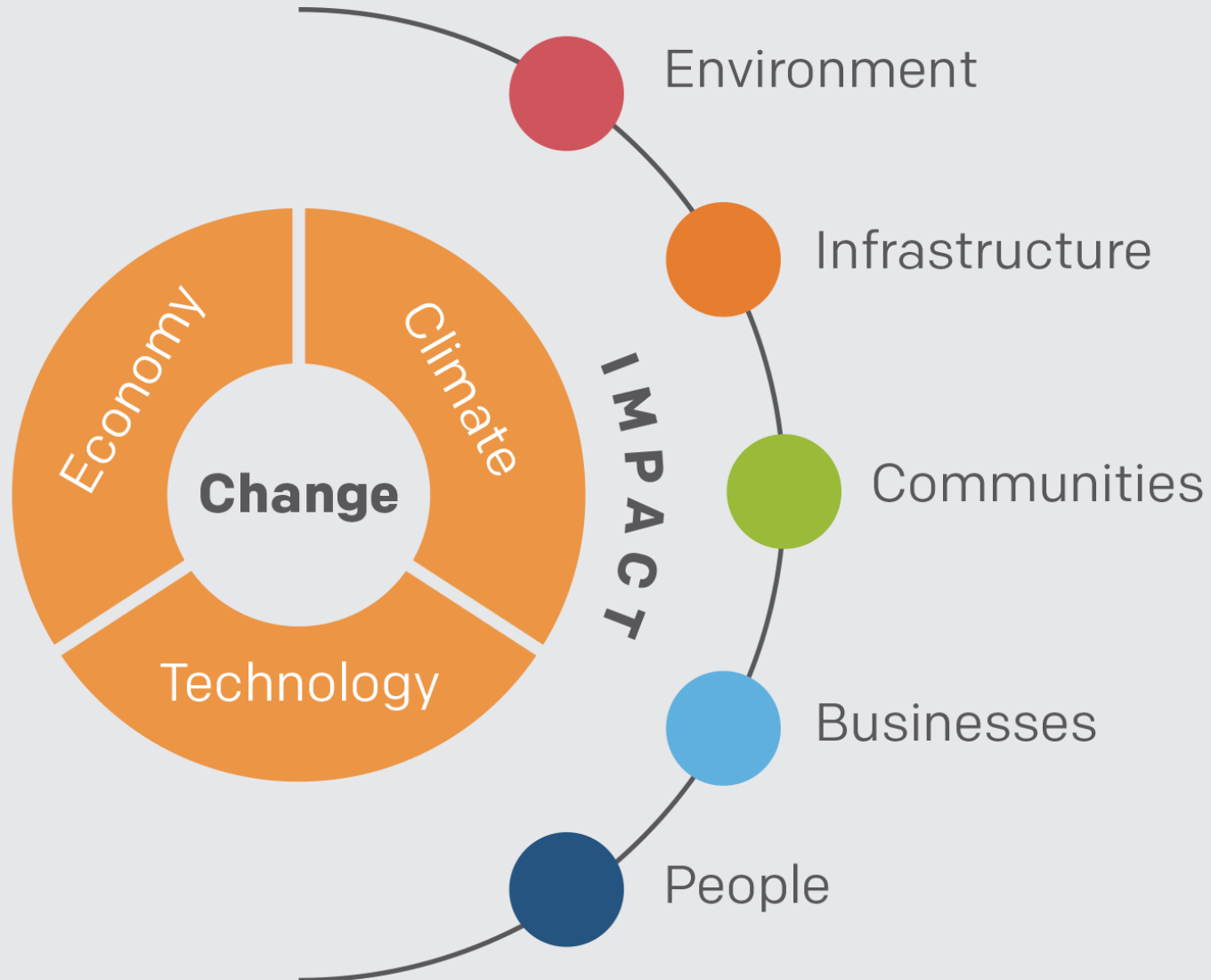
50% NI hotel room stock is in Belfast

+59% Belfast accommodation bed stock since 2013

90% business events in NI are in Belfast

95% of cruise visitors to NI arrive into Belfast

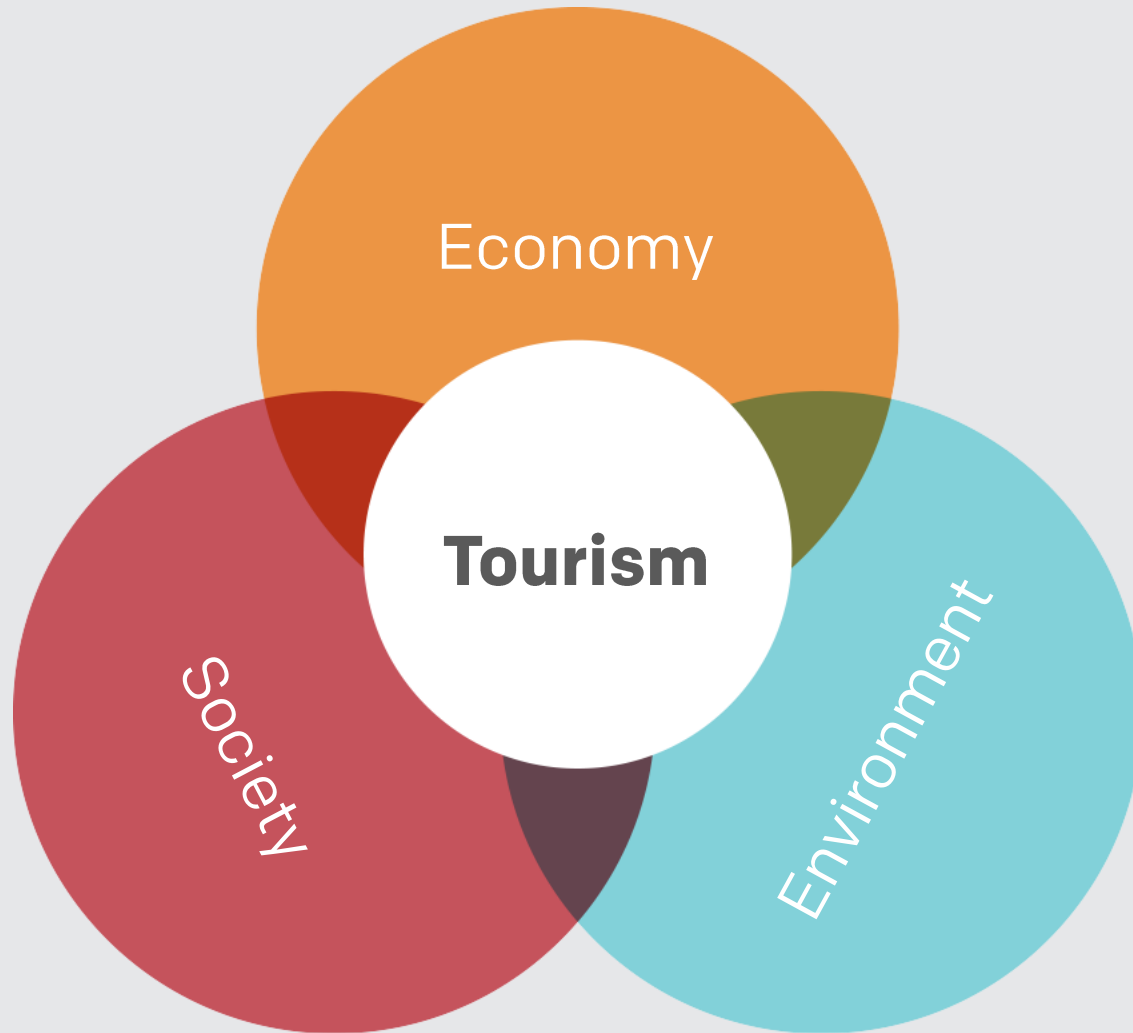
THE NEW PARADIGM



Need to balance:

- Economy
- Society
- Environment

NEW REGENERATIVE MODEL FOR TOURISM



Tourism can be a force for good and central to:

Building

a resilient economy

Delivering

Inclusive growth

Protecting

the environment

VISIT BELFAST: NEXT GENERATION DMO



Advocacy

**Environment/
Societal KPIs**

Safeguard

city tourism and support local industry

Deliver

destination cohesion and drive out duplication

Demand generation

build demand, generate bookings and
welcome back visitors

VISIT BELFAST

GUIDING PRINCIPLES & OBJECTIVES

Guiding Principles

- Environmental sustainability
- Inclusive growth
- Partnership/collaboration
- Flexible/adaptable
- Visitor/citizen focussed

Objectives

Drive

overnight trips, day visits and spend

Encourage

repeat visits and increase visitor satisfaction

Spread

the benefits of tourism across the region

Champion

the Belfast destination brand

OPERATING CHALLENGES



Shape of the industry
post COVID-19



Brexit



Restoring air/sea access
and connectivity



Changing consumer
values/consumption



Responsible and
sustainable tourism



Safety, health
and hygiene



Consumer confidence
and community consent



Digitalisation



City and regional
spread

POLICY FRAMEWORK



CITY TOURISM POST COVID-19

Changing Visitor Behaviour & Preferences

- Socially and environmentally conscious traveller
- Health and wellbeing
- Love local

Dial Up/ Refocus

- Compact city: walking, cycling, public transport
- Near markets are our main markets (GB, ROI)
- Familiar yet young and fresh tourism product
- Emerging neighbourhood tourism
- Access to green/open spaces
- Local talent: music, food and creative arts and culture
- Innovative digitalisation: providing seamless travel

Visit Belfast Marketing & Sales

- Champion responsible tourism
- Promote neighbourhood tourism
- Amplify the city's emerging culture and arts sector
- Focus on NI, ROI & GB and repeat visitors
- Accelerate the safe return of conference and cruise tourism
- Supporting the return of international tourism
- Embracing new technologies

NEW INITIATIVES BUILDING BACK BETTER

Responsible Tourism

Measuring environmental, community and social impact KPIs

- Develop Global Destination Sustainability action plan with BCC
- Aim for Belfast to be a GDS certified destination by 2025
- VB third-party certified DMO by 2022

Love Local

- Develop new neighbourhood and cultural tourism clusters
- Roll out new partnership scheme

Health & Wellbeing

- Positioning Belfast as a safe, welcoming city
- Providing visitor and community assurance

Demand Generation

- Flexible conference support and corporate schemes
- Next generation' ambassador programme

Acceleration of Digitalisation

- Enhance path-to purchase and visitor journey, real time personalised information and automation

visit
Belfast

MARKETING COMMUNICATIONS

90,000

BED NIGHTS

100,000

DAY TRIPS

£20m

VISITOR SPEND

TOUCH POINTS AND THEMES



Reimagine Belfast –
culture, art & music



Iconic Waterfront –
maritime and history



Belfast City Region
experiences



Food and Drink – restaurants,
markets and locally sourced



Events, festivals
and sport



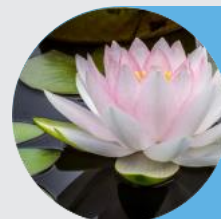
LGBTQI+



Homespun –
people and stories

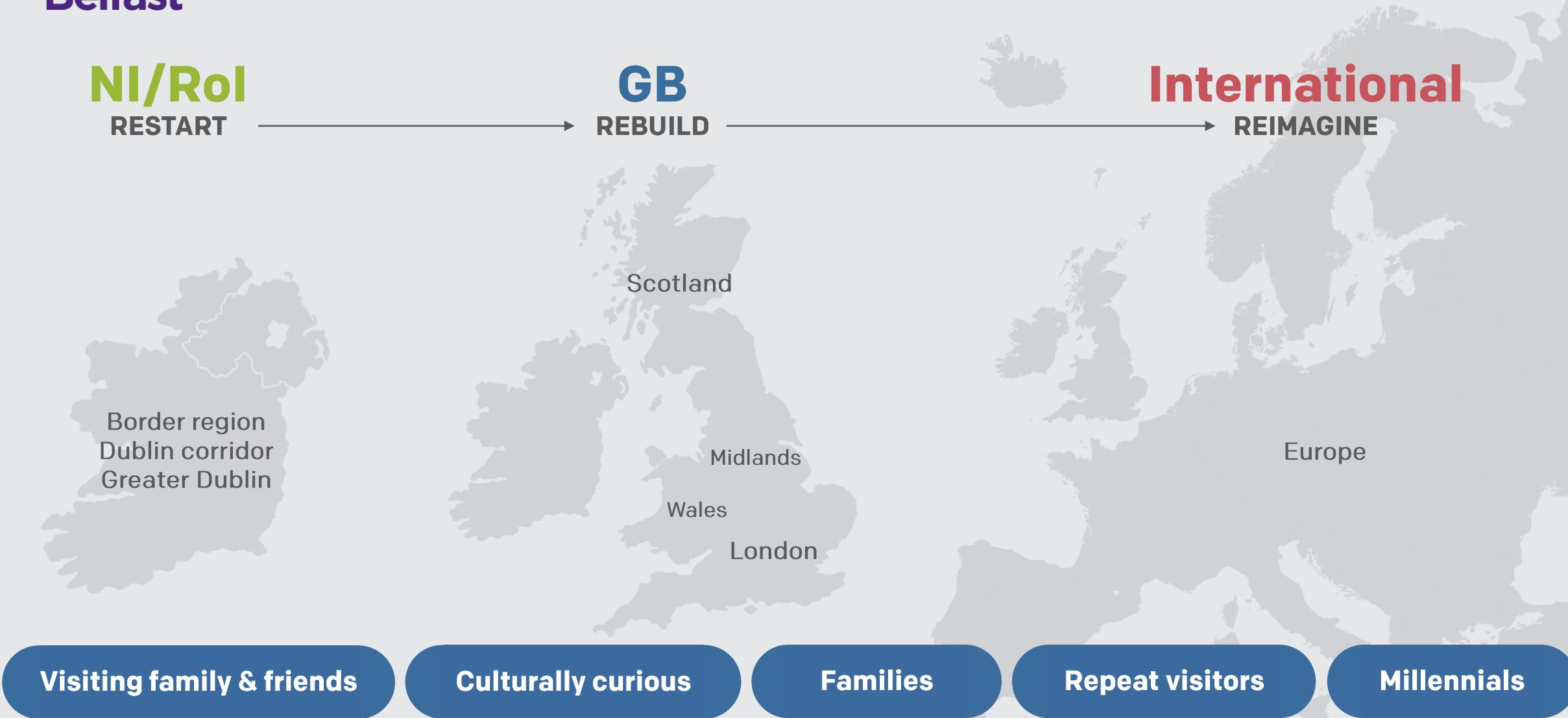


Outdoors, green
spaces and nature



Health and Wellness –
luxury and spa experiences

PRIORITY MARKETS & SEGMENTS



SCENARIO PLANNING

Scenario 1 FULL LOCKDOWN	Scenario 2 LOCKDOWN RESTRICTIONS PARTIALLY LIFTED	Scenario 3 LOCKDOWN RESTRICTIONS SIGNIFICANTLY EASED NI regional travel to Belfast allowed	Scenario 4 UK AND TRAVEL FROM CCE ALLOWED (but international borders closed)	Scenario 5 UNRESTRICTED TRAVEL WITH SAFETY PROTOCOLS AND MEASURES
Dream Now & Travel Later / Stay at Home & Stay Safe Inspirational/PHA messaging, at home activities, content, puzzles, jigsaws and competitions, keeping brand alive and destination awareness				
	Shop local, Support Local, Welcome Back Belfast / We're Ready, Are You? Reactive and selective marketing & comms supporting reopened businesses safely, agile digital only marketing and day trip focus supporting PHA guidance. Welcome back messages, offers/updates			
		Home-Aways in Belfast / Our City's Your City / Belfast in Blooming High intensity, close to normal marketing, bolster campaign activity and seasonal destination marketing driving demand - day & overnight trips. Upbeat messaging, reassuring/ inspirational, confidence building: providing reasons to visit Belfast		
			Uniquely Belfast, Only in Belfast / Belfast is Home / Wish you Were Here New video and content. Intensified & heavyweight Destination Belfast creative integrated tactical campaign approach to drive bookings: GB focus and IOI for staycations/repeat visits. Partnering industry, TI & TNI to integrate/maximise results	
				Building Back Better: Our City, Your Planet / Greening Belfast/ Better in Belfast Position Belfast as a Future City. Rebuilding Belfast profile as a leisure/ business destination, promotion that stimulates demand, achieves growth & builds back business

**visit
Belfast**

BUSINESS DEVELOPMENT

60,000

BED NIGHTS

£30m

ECONOMIC BENEFIT

BUSINESS TOURISM KEY PRIORITIES

Building back

doubling conference sales performance

Target

aggressively the GB market and re-focus on ROI market

Ramp-up

sales and marketing activity across the board

Refresh

the Belfast proposition to ensure it is compelling in new market context

Support

city recovery at local level – meet out to help out initiative in partnership with industry (local corporate business)

Retain

as much of the £92m forward booked business for city

TRAVEL TRADE PRIORITIES

Ramp up

sales and marketing activity across the board
and maximise opportunity through virtual platforms

Site & Fam visits

programmes including industry planning days with
Gold operators

New itinerary development

to meet new demands of operators and consumer
preferences

visit
Belfast

VISITOR SERVICING

450,000

ENQUIRIES

£9m

ECONOMIC BENEFIT

visit-belfast.com

visitBel

ME
F

VISITOR SERVICING

Rebuilding business and tourism recovery

- Driver for repeat visits
- Extending visitor stay and spend
- Providing reassurance



Digitalisation

- Enhancing technology-led visitor information services/experiences
- City/Destination Pass
- Online gift shop



Cruise

- Visitor flow, capacity management and safeguarding
- Visitor information and welcome



KEY METRICS

BED NIGHTS

DAY TRIPS

**CRUISE
VISITORS**

**CONFERENCE
DELEGATES**

**VISITOR
ENQUIRIES**

**ENVIRONMENTAL
IMPACT**

SOCIETAL IMPACT

KEY OUTCOMES

150,000 BED NIGHTS

100,000 DAY TRIPS

**338,000
CRUISE PAX/CREW**

**21,000 CONFERENCE
DELEGATES**

**450,000 VISITOR
ENQUIRIES**

**£74m
ECONOMIC IMPACT**

**ROI
£1:23**

VISIT BELFAST CHANGE PROJECT OUTCOMES

- Visit Belfast to become a Green Tourism certified DMO by year 2022
- Green Tourism Partnership Scheme: 50% industry sign up
- 30% of Visit Belfast won business events will have a sustainability plan
- 30% of Visit Belfast won business events will have an impact/legacy plan
- Improve Belfast's GDSI score in order to achieve improved ranking
- Launch the Copenhagen Legacy Lab model for business events
- Launch new conference support scheme in partnership with BCC/TNI
- Launch next generation ambassador programme in partnership with Invest NI
- VBWC technology upgrade
- Implement Visit Belfast IT infrastructure review
- Complete organisational realignment

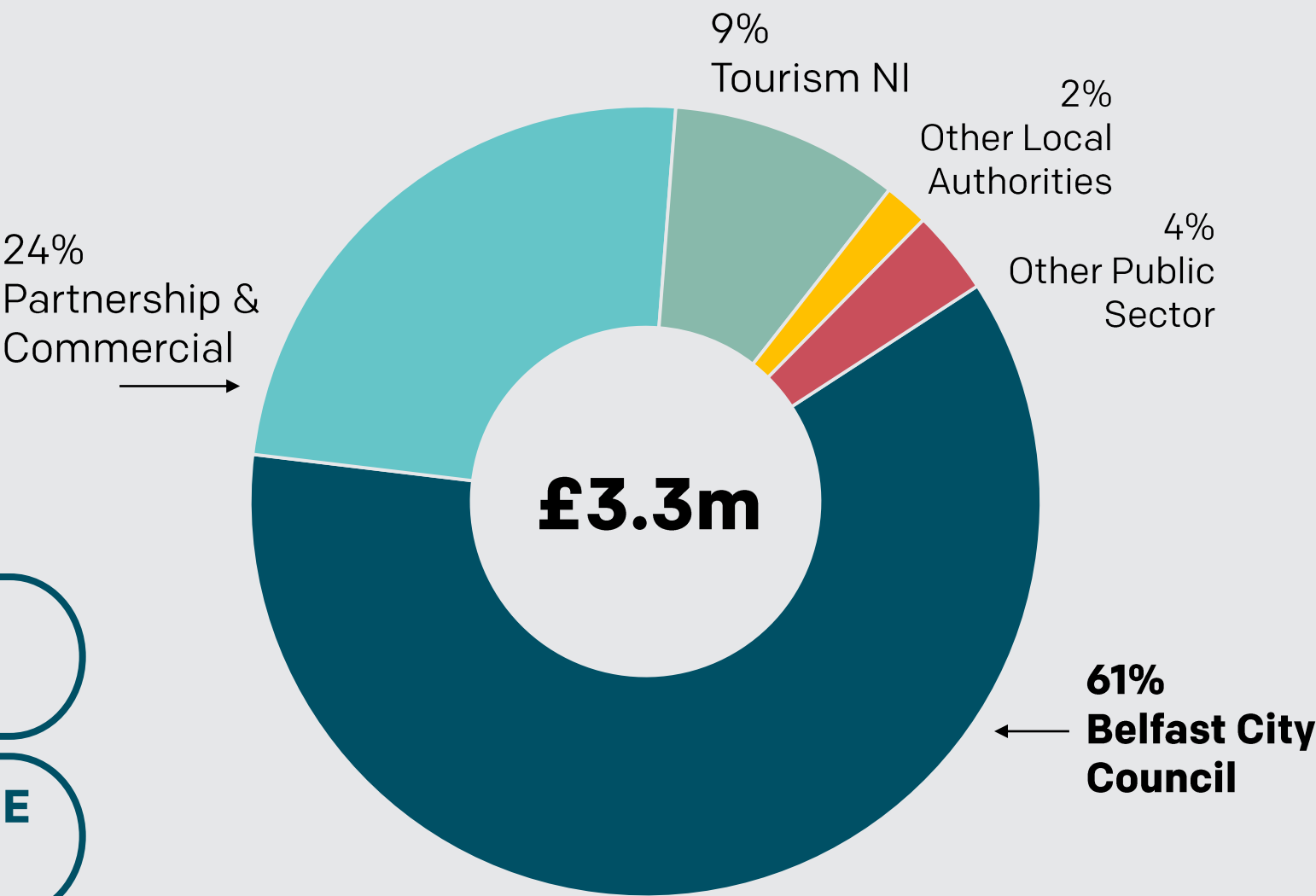
INCOME & EXPENDITURE 2021-22

INCOME	2021-22
Public Sector	
Belfast City Council	1,997,465
Tourism NI*	305,500
Other Public Sector	112,500
Other Local Authority	60,000
Total Public Sector	2,475,465
Partnership & Commercial	795,458
TOTAL INCOME	3,270,923

EXPENDITURE	2021-22
Marketing & Sales	2,321,648
Visitor Servicing	597,468
Overheads & Admin	602,302
TOTAL INCOME	3,521,419
Use of reserves	250,496

* TNI funding reviewed annually (2021-22 TBC)

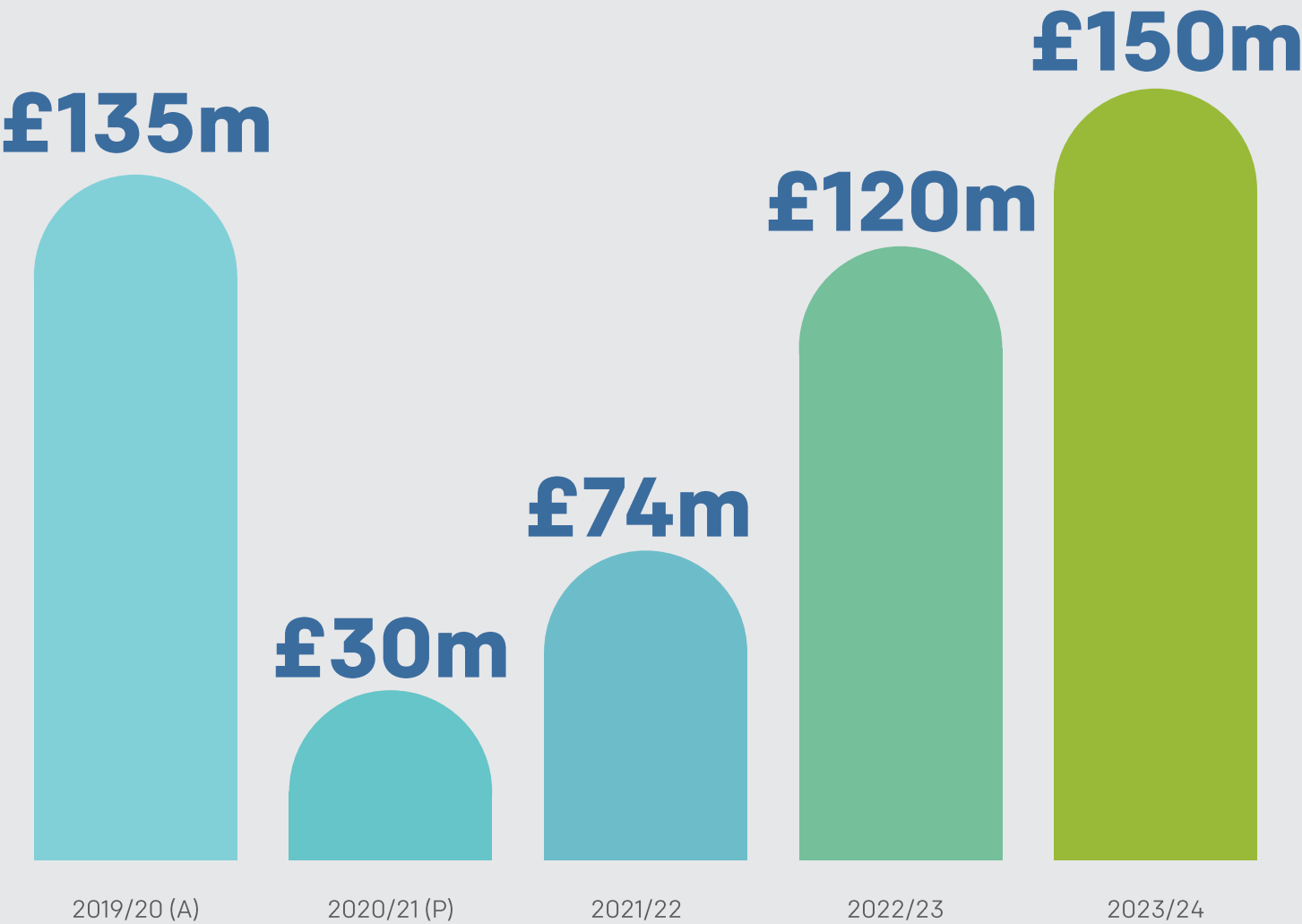
OPERATING BUDGET



BCC ROI
£1:37

BCC LEVERAGE
£1:0.40

3 YEAR RECOVERY STRATEGY



DRIVING
£344m
to the local economy

KEY MESSAGES

Belfast is critical to NI economic recovery

Tourism can be a force for good: economy, society and environment

**Belfast City Region
tourism/cultural assets mean
we are well placed for recovery**

These plans set out a new direction of travel and will ensure Belfast is market and operationally ready