



<b>Subject:</b>	Make Yourself at Home – Tourism Plan
<b>Date:</b>	6 April 2022
<b>Reporting Officer:</b>	John Greer, Director of Economic Development
<b>Contact Officer:</b>	Eimear Henry, Senior Manager – Culture and Tourism

<b>Restricted Reports</b>	
<b>Is this report restricted?</b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
<b>If Yes, when will the report become unrestricted?</b>	
<b>After Committee Decision</b>	<input type="checkbox"/>
<b>After Council Decision</b>	<input type="checkbox"/>
<b>Some time in the future</b>	<input type="checkbox"/>
<b>Never</b>	<input type="checkbox"/>

<b>Call-in</b>	
<b>Is the decision eligible for Call-in?</b>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>

<b>1.0</b>	<b>Purpose of Report or Summary of main Issues</b>
1.1	At a meeting of City Growth and Regeneration Committee in September 2021, it was agreed that the draft tourism plan for Belfast, <i>Make Yourself at Home</i> would complete a 12-week public consultation. The purpose of this report is to provide Members with an overview of feedback and present the final plan for approval.
<b>2.0</b>	<b>Recommendations</b>
2.1	Members are asked to: <ul style="list-style-type: none"><li>- Note the contents of this report and feedback received as part of the public consultation.</li></ul>

	<ul style="list-style-type: none"> <li>- Agree the final plan, <i>Make Yourself at Home</i> including the priorities as set out at appendix 2 for year one and associated budgets.</li> </ul>
<b>3.0</b>	<b>Main report</b>
3.1	<p>Members will be aware that at a meeting of City Growth and Regeneration Committee in September 2021 it was agreed that the <i>draft</i> tourism plan, <i>Make Yourself at Home</i> would complete a 12-week public consultation. The purpose of this plan is to:</p> <ul style="list-style-type: none"> <li>- 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>.</li> <li>- 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.</li> <li>- Support economic and social recovery in the context of COVID-19 including stabilisation, recovery and growth with the opportunity to build back better.</li> <li>- 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.</li> </ul>
3.2	<p><b>Tourism Growth Pre Covid-19</b></p> <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>
3.3	<p>Belfast's tourism and hospitality sectors directly support 19,300 jobs, one third of the sector in Northern Ireland. Key tourism sectors such as Accommodation &amp; Food Services, Arts, Entertainment &amp; Recreation and Transportation have been 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</p>

	<p>increased by 18.2 percent, compared with 8.5 percent growth in the city's total employment.</p>
3.4	<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>
3.5	<p><b>Impact of Covid-19</b></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 that 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>
3.6	<p><b>Developing a ten-year plan</b></p> <p>The <i>Make Yourself at Home</i> tourism plan sets out a vision for the future of tourism in the city that is centred on a people-based and sustainable model of development with a focus on:</p> <ul style="list-style-type: none"> <li>- Increasing the coherency of the Belfast experience</li> <li>- Supporting quality authentic products</li> <li>- Developing skills</li> <li>- Strengthening the city's position through marketing and communications</li> </ul>
3.7	<p><b>The approach</b></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>
3.8	<p>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 tourism plan seeks to set out how this growth can</p>

be achieved in a responsible and inclusive way recognising that the city's greatest asset is its people.

3.9

The plan sets out a shared vision for tourism in the city and is supported by 4 strategic themes and three of catalyst projects. The strategic themes are:

- Grow Belfast
- Experience Belfast
- Position Belfast
- Sustainable Belfast

3.10

Each theme is supported by an evidence-based body of work and research.

3.11

### **Public Consultation**

Following approval by City Growth and Regeneration Committee, the *draft Make Yourself at Home – A vision for the future of tourism* completed a 12-week public consultation. As part of this process Council engaged directly with over 330 stakeholders including:

- Online citizens and stakeholder engagement: The council carried out an online 12-week consultation via the Council's YourSay engagement platform to gather information, and this provided an opportunity for residents and stakeholders to review proposals, provide feedback and help shape the final plan. Results indicated 123 visitors and 30 full responses to the survey.
- Workshops and Presentations - nearly 200 attended these workshops tailored around the themes of the plan including a dedicated session on Belfast Stories. Attendance included a wide range of community tourism organisations, tourism businesses, partners and cultural organisations.
- Council's Section 75 consultee list: The council issued the consultation to our Section 75 list and provided representative groups with an opportunity to respond. Presentations were delivered to the Council's Equality Consultative Forum and Disability Advisory Panel.
- Response to requests for one-to-one meetings and presentations with a variety of stakeholders across the city, gave the opportunity for focused and in-depth engagement with stakeholders. This helped to foster a greater understanding of how the draft Tourism Plan can feed into their field of work, as well as identifying opportunities for city wide partnership working and collaboration.
- Presentation of the draft Tourism Plan as an integral part of recent Belfast Stories engagement.

- Council's stakeholder list: The council issued the consultation to a wide range of organisations including: Tourism Ireland, Tourism NI, Visit Belfast (500 tourism business partners), Community Tourism projects via Fáilte Feirste Thair, Eastside Partnership, Shankill Partnership and South Belfast Partnership, Belfast Hills Partnership and Colin Glen Trust and National Trust, tourism sector businesses, visitor attraction representatives, tour guides, individual artists and organisations within the cultural sector and trade representative organisations.

3.12

The overall feedback on the plan was very positive with the principles of being people-centred, responsible and sustainable strongly welcomed. General areas of feedback included:

- Support for an inclusive approach that recognises need for investment in neighbourhoods and creates opportunities for co-design with local communities. There is a need for long-term investment and capacity building to allow for engagement, development and delivery. This should be tailored to recognise that not all parts of the city or communities are at the same stage of development.
- Importance of Council's leadership role as well as direct delivery especially in relation to the principle of responsibility.
- Importance of an all encompassing approach to sustainability that includes an economic and social dimension as well as environmental.
- Affordability – need to minimise negative impact of tourism on locals and maximise positive impacts.
- Importance of alignment with climate and resilience programmes.
- Inclusivity is important and this should consider thematic as well as geographic alignment to reflect diversity within the city. Organisations that don't fit into neighbourhoods also need to be afforded opportunity to avail of funding and the governance structure should reflect this.
- Importance of measuring benefits to local communities beyond economic impact. The plan sets out a comprehensive approach to measuring success that includes economic and social benefits.
- Opportunity to position innovation in tourism using our digital and creative industries to come up with new ways to enhance experiences and improve connectivity.
- As well as new developments Council should commit to building on city's existing asset base and address challenges such as infrastructure to improve access.

3.13	<p><b>Strategic Themes</b></p> <p><i>Strategic theme 1: Grow Belfast</i> (supported by EY Recovery report)</p> <p>This theme focuses 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 includes:</p> <ul style="list-style-type: none"> <li>- Strategic context and evidence-based proposition that Belfast acts as a catalyst for the region.</li> <li>- 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.</li> <li>- Priority areas for investment e.g. catalyst projects.</li> <li>- Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.</li> </ul>
3.14	<p>Specific areas for feedback to be addressed in implementation plans and alignment to <i>Bolder Vision</i> and <i>A City Imagining</i>:</p> <ul style="list-style-type: none"> <li>- Need to ensure that there is investment in existing assets</li> <li>- Important to recognise and support key elements of Belfast’s existing offer and wider Belfast stories such as maritime, music, culture and arts</li> <li>- Relationship between regeneration and tourism including need to improve access to tourism assets through better connectivity – addressing areas of low footfall, dereliction etc.</li> </ul>
3.15	<p><i>Strategic Theme 2: Position Belfast</i> (supported by a Positioning Review completed by Blue Sail Consulting).</p> <p>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. <i>Make Yourself at Home</i> sets out a dynamic model for city positioning that strengthens Belfast’s role as the gateway to the region in a way that responds to key markets including:</p> <ul style="list-style-type: none"> <li>- Business Tourism and sub-sectors within this group.</li> <li>- Leisure tourism target markets including - geographic considerations and the visitor journey.</li> </ul>

3.16	<p>This theme takes 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 is narrative driven and the new plan sets out areas of support on:</p> <ul style="list-style-type: none"> <li>- How do we tell Belfast stories? How do we enable people to tell their Belfast story?</li> <li>- How do we create an emotional connection with visitors?</li> <li>- How do we make local stories resonate internationally?</li> </ul>
3.17	<p>The theme brings forward actions that support an effective way of working and will be particularly dependent on successful establishment of governance and leadership support mechanisms that will be strengthened to support the overall delivery of the plan.</p>
3.18	<p>Specific areas for feedback to be addressed in implementation plans and through work with Visit Belfast, Tourism NI and Tourism Ireland:</p> <ul style="list-style-type: none"> <li>- Need to ensure that as well as a Gateway to Northern Ireland that Belfast is positioned as a must-see urban destination on the island of Ireland by capturing GB and ROI city break market and attracting greater share of Out of State visitors to Ireland.</li> <li>- Belfast Stories needs to extend beyond city centre proposal to strengthen and support organisations already telling stories across the city.</li> </ul>
3.19	<p><i>Strategic theme 3: Experience Belfast</i> (supported by Visitor Experience Framework developed with CHL Consulting)</p> <p>The plan provides a summary of key actions to strengthen the coherency of Belfast's overall visitor experience. The plan contains strategic priorities that:</p> <ul style="list-style-type: none"> <li>- 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</li> <li>- focuses 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.</li> <li>- prioritises delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.</li> </ul>
3.20	<p>This theme is critical to the overall success of the plan due to:</p> <ul style="list-style-type: none"> <li>- the role of Belfast City Council in developing the Belfast experience through the development of Council assets.</li> </ul>

<p>3.21</p>	<ul style="list-style-type: none"> <li>- Support for local initiatives and development plans through geographic or thematic based community development.</li> </ul> <p>In developing this theme, a number of pieces of foundational work have been completed including:</p> <ul style="list-style-type: none"> <li>- A mapping exercise which maps our existing tourism assets against the city's 'Belfast brand' and Tourism NI' 'Embrace the Giant Spirit' brand.</li> <li>- Assessment of the quality, market fit and sustainability of existing products.</li> <li>- Development of a proposed combination of thematic and geographical clustering.</li> <li>- Undertaken a gap analysis of potential experience-based products. The gap analysis reviewed what was missing from the tourism offer taking into consideration issues such as seasonality, immersive experiences, events and festival animation, and opportunities to meet local people for instance.</li> <li>- Consideration of investment and evaluation criteria for longer term priorities and programmes of support incorporating social, environmental and economic factors.</li> </ul>
<p>3.22</p>	<p>Specific areas for feedback to be addressed in implementation plans include:</p> <ul style="list-style-type: none"> <li>- Importance of investing in local tourism is recognised however this has to take a thematic approach as well as being geographic or place-based. There is an opportunity to develop clusters that helps to increase visibility of existing assets.</li> <li>- The overall visitor experience will only be delivered if there are also improvements in connectivity and accessibility.</li> </ul>
<p>3.23</p>	<p><i>Strategic theme 4: Sustain Belfast</i> (supported by benchmarking of Belfast as part of Global Destination Sustainability Index)</p> <p>This theme is shaped 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</p>



	<p>industry associations suppliers and clients to develop effective strategies and practices in support of sustainability goals.</p>
3.24	<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"> <li>- City Environmental Performance</li> <li>- City Social Performance</li> <li>- Supplier Performance</li> <li>- Destination Management Performance</li> </ul>
3.25	<p>Belfast has now completed a second year of benchmarking resulting in significant improvement taking our place within top 20 cities. A series of related recommendations are included in <i>Make Yourself at Home</i>. A number of these relate to Visit Belfast's role as the Destination Management Organisation (DMO) and Visit Belfast have already made significant progress in implementing these as part of their current funding agreement with a commitment to build on this on a multi-annual basis. However, Council also has a direct role and recommendations within the plan include the establishment of a taskforce and a sustainability lab for tourism in Belfast. Further action is also set out in relation to improving Council owned assets and supporting the supply chain.</p>
3.26	<p>Specific areas for feedback to be addressed in implementation plans and as part of ongoing work with Visit Belfast on Global Sustainability Index and Tourism NI on regenerative tourism:</p> <ul style="list-style-type: none"> <li>- There is a market imperative to support this area of work based on consumer attitudes as well as a social responsibility.</li> <li>- It is important for Belfast to maintain ranking on GDSI to ensure that we are striving to meet international standards.</li> <li>- As well as overarching sustainability principles there should also be support for develop sustainable tourism products.</li> </ul>
3.27	<p><b>Catalyst Projects</b></p> <p>All four of these strategic themes are underpinned by the need to support inclusive economic growth and to differentiate the Belfast offer in an increasingly competitive global marketplace. A fifth strand to the plan considers key strategic opportunities that could</p>

bolster investment in the sector in order to support recovery and future growth. These are catalyst or accelerator projects and are outlined below.

3.28 Catalyst Project 1: Our Place – support for local tourism

Adopting a place-based approach to the development of our neighbourhoods through local tourism investment that supports product development, jobs creation and destination management including the design and delivery of a Belfast Experience Development Fund to support product development. There are also opportunities to support capital development through alignment with existing programmes such as the Neighbourhood Regeneration Fund.

3.29 Catalyst 2: Make Yourself at Home

This is a renewed commitment to long-term initiatives contained in the cultural strategy including signature Belfast events, International Year of Culture and UNESCO City of Music. The global summit of One Young World has been secured for 2023. A plan will be developed to bid for other major events that support the ambitions set out in the plan. Members will be aware that Belfast had planned to host a year of culture in 2023 in line with the original European Capital of Culture bid. However, the ongoing impact of COVID-19 at a city level in terms of the capacity of our local sector to deliver something of this scale in 18 months and the trajectory for the full return of international markets increasing makes this challenging. Therefore, it is now proposed that a multi-annual approach is taken forward focussing initially on the period 2022-24. Building on the cultural strategy, we have positioned events as one of the catalyst programmes for tourism to help contribute to the city's long term growth (visitor numbers, dwell time, spend and brand positioning) and in particular act as a key motivator for GB and Ireland visitors as part of the next phase of recovery. Over this initial period this would include at least 2 flagship events each with a critical mass of homegrown activity in 2024.

3.30 Catalyst Project 3: Our Stories

Delivering the Belfast Stories as part of the tourism pillar of the Belfast Regional City Deal must be part of an overall integrated approach to tourism development and inclusive economic growth for the city. Belfast Stories will connect to local tourism product development and infrastructure through a hub and spoke model. Importantly the Hub will be an exemplar for responsible and sustainable tourism demonstrating the principles set out in the ten-year plan. Through the focus on Belfast Stories, the project will also be transformative for the positioning of the city. The development programme for this project

as part of BRCD is fully aligned to this tourism plan with cross-cutting priorities and synergies.

3.31 **Implementation**

The success of the plan will require ongoing review and delivery. To support this a number of key early actions have been identified including:

- Setting up of proposed governance and partnership model to drive the implementation of *Make Yourself at Home*
- Scoping short and long-term investment priorities and financing strategy
- Tailored action plans to address areas of priority.

3.32 Appendix 2 sets out priority actions for Year 1 of the new plan. This includes the development of a new investment programme for local tourism. The detail of this fund will be presented to Committee in due course setting out proposed process, criteria and timeframes.

3.33 Members will be aware that Council has supported local tourism conduits Fáilte Feirste Thiar and Eastside Tourism for a number of years under the City Connections Programme. This has included working in partnership to increase connectivity across the city, conducting consumer research and developing local partnerships. It is proposed that this programme is replaced by the new investment programme however in order to support transition and given that the new programme will not be operational until later in the year it is proposed that £25,000 is allocated (25% of previous annual investment) to these organisations.

3.34 As part of implementation and in response to consultation feedback, a number key areas of development are identified for Council to lead including:

- A detailed accessible (inclusive) programme to include working with tourism sector to review communications, train staff and improve facilities.
- A detailed sustainable tourism programme to address key weaknesses as identified by Global Sustainability Index (GDSI).
- A detailed food tourism programme to support hospitality and food businesses focused on local produce.

3.35 City Events

	<p>Members will be aware that significant work has taken place in recent years to realign City Events with Council’s wider cultural and tourism ambitions. This has included a renewed focus on working in partnership and developing programmes that support the local cultural sector and represent an authentic Belfast Experience. Included in Appendix 2 are the proposed events for 2022/23. Further detail on approach and programmes will be presented to Committee at relevant points throughout the year. Members will note that there are currently no plans to deliver Hallowe’en in 2022. It is proposed that this event is reviewed in line with the development work that has taken place on other events. This should include options for city events to represent greater cultural diversity within the city and how a partnership model could be developed. An update will be presented in due course.</p>
3.36	<p><u>Financial &amp; Resource Implications</u></p> <p>There are currently no immediate new financial implications to this report. Appendix 2 sets out a breakdown of budget against programmes of work to be allocated from existing departmental budgets. Further detail on proposals for investment in local tourism will be presented to Committee in due course.</p>
3.37	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> is subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). A specific screening has been carried out on this associated tourism plan and was included as part of the consultation exercise. Mitigating actions have been considered as part of the implementation plans. Catalyst projects such as Belfast Stories will be subject to a separate Equality Impact Assessment. It is also anticipated that should any investment programmes emerge from this plan these will be subject to further equality screening.</p>
4.0	<p><b>Appendices – Documents attached</b></p>
	<p>Appendix 1: <i>Make Yourself at Home</i> – Planning for the future of tourism</p> <p>Appendix 2: Tourism and Events Priorities 2022/23</p>