

**MAKE
YOURSELF
AT HOME**

Belfast

Planning for the future of tourism

**We are a city that confounds expectations. A city that's like no other.
For a capital city we're small... compact. Our heart is big.
Our spirit strong. Our energy palpable.
Our character stout. Our humour dark.
And the craic is mighty.**

We're a great city that welcomes you with open arms - and we're ready to tell our stories to the world. For visitors there's the unforgettable experience of being in a city in transition - an edgy city that's on the move. Colourful, complicated, messy... and magnificent.

Because Belfast is a city that's rich in so many ways.

Richly storied: an early coastal settlement named Béal Feirste, enfolded by hills, rivers and loughs, this is a place with a long and complex history, a tapestry of narratives, and now a new story in the making.

Richly ornate: this industrial powerhouse of the 19th and early 20th centuries has lavish façades and gorgeous interiors - not just the grand civic buildings but its pubs and cafés and hotels.

And rich in culture, talent and creativity: with our history of making things, our extraordinary street art, our live music scene, our sporting legends and our unique dialect that helps give the city its different sound. Belfast's long been home to creators who dare to dream - industrial designers and innovators, technicians and craftspeople, as well as artists, writers and poets, music and film-makers.

There are other giants in Belfast too - the world famous story of the Titanic and the towering new edifice that marks its creation, the sleeping giant's silhouette on the ever-present Belfast hills that encircle the city, the huge yellow dockside cranes Samson and Goliath which dominate the skyline, the Peace Walls that open your eyes to the recent troubled past.

In one trip you can experience a cultural city, a vibrant evening city, a maritime river city, a university city, a foodie city and a historic city. Belfast's story is all around you - it's written (quite literally) in the paving stones and on the walls. And after a day or two here - walking the streets, hearing the stories, listening to the voices - you start to make the connections. You start to unlock the past. You start to understand the banter. You start to feel like you belong. Which is a nonsense, of course... but tourism's still relatively new here, and the people go out of their way to make you feel at home. There's a generosity to strangers that can take the visitor by surprise... but it shouldn't: it's part of the local DNA.

So... BELFAST IS READY. ARE YOU?

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MAKE
YOURSELF
AT HOME

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Chapter 1

OPEN DOORS

THE INVITATION

If future-proofed cities are a global aspiration, then now is the time for Belfast to stop chasing the horizon and realise that despite our complex challenges, we've had the solution all along. Our greatest asset is that of any city - our people. To have the confidence and belief that the rest of the world might be interested in a city situated at the northernly point of an island on the edge of Europe, is to reach into the heart of this pandemic and affirm that connection and social interaction are fundamental human needs. When our lives contracted to the footprint of our bricks and mortar homes, we promised that when life returned to normal, we would do things differently. As we open our doors again, as citizens and as a society, let us extend the invitation to make yourself at home to our neighbours, both local and global.



Image opposite:
Pottinger's Entry
by Irony

THE CHALLENGE

Tourism hasn't always had the best reputation with a tension between the economic and regeneration benefits of the visitor economy and the potential for negative impact on the local population and on the planet. Yet for a city such as Belfast, juxtapose this with the ebb and flow of people arriving and departing and we quickly realise that visitor mobility creates a permeability to our city that can enrich our own lives. This plan seeks to build on the success of tourism to date acknowledging both the investment of the public sector and the significant contribution of business, local enterprise and communities in taking risks and establishing, in a relatively short period of time, a city offer of culture, heritage and hospitality to be celebrated. The next phase of development should now commit to an inclusive approach that recognises the importance of tourism and global connectivity to our economic and social wellbeing, but to do so under the principles of being people-centred, responsible and sustainable. We acknowledge that the success of this plan will require closer collaboration with all of our partners and the need to continue to strengthen our relationship with Visit Belfast, Tourism NI and Tourism Ireland.



People-centred

This plan is centred around the local and the visitor and how to create the environment for interaction, engagement and exchange. This will include ongoing research that better understands the needs of the visitor and provides evidence of the inclusive benefits of tourism to local people, businesses and neighbourhoods.



Responsible

The role of local government in tourism development has evolved in recent years and is likely to continue to do so. This plan therefore sets out those key actions within Council's sphere of agency to affect positive change whilst also recognising our role in influencing and shaping policy and legislative reform in support of a visitor economy that will effectively serve the city and the region.



Sustainable

A people-centred and responsible approach to tourism development should align to sustainable development goals across economic, social and environmental spheres. This plan commits to striving to introduce models of best practice and to better understand the effects of our collective actions both positive and negative.

THE ECONOMIC IMPERATIVE

The early development of today's tourism industry in Belfast was largely organic, driven by the 'culturally curious' visitor who was keen to see, do and experience something a little different. To date this development has been largely positive with heritage-led investment projects such as Crumlin Road Gaol and the iconic architectural infrastructure of Titanic Belfast receiving overwhelmingly positive feedback from visitors and collectively drawing in excess of 1 million visitors in 2018-19.

Despite huge efforts, there is still a gap in scale and maturity of the local industry. Notably, NI lags behind the rest of the UK and Ireland with respect to tourism as a driver for Gross Value Added (GVA) with just 2.3% of NI's GVA attributable to tourism compared to the Republic of Ireland reported at approximately 3.9% and in Scotland at 4.1%. It was in this pre-COVID-19 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 opportunity is getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region. As the gateway to the region, 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 destination is developed in a strategic way that maximises the economic and social benefits which can be derived from tourism for local industries, businesses and communities, as well as increasing visitor numbers and their spend and improving overall satisfaction levels. In the light of the ongoing COVID-19 pandemic it is imperative to plan for the future and to ensure that tourism continues to build as a key export for Northern Ireland. This plan therefore sets the target of doubling tourism revenue by 2030.



THE OPPORTUNITY

Belfast's ambition to attract more visitors who stay longer will depend on our ability to deliver memorable experiences. This relationship starts at the first point of contact with the prospective visitor which is now increasingly taking place within a digital space. For the traveller their connection to a place is established before their decision to visit. Whether through traditional media, online platforms or word of mouth we make certain associations with particular cities. In Belfast, we must continue to challenge perceptions of our city and establish new relationships with our global communities. In recent decades we have confounded expectations and for those who have made the decision to visit us, we have left them with a new appreciation of the place we call home. The opportunity now is to raise this bar and to move from confounding to celebrating.

By maximising our unique cultural assets and applying a creative approach to our marketing campaigns, we can create more engaging experiences for visitors that will leverage better overall tourism outcomes for Belfast and the NI region. Research indicates that international visitors seek authentic, immersive experiences that allow them to connect with the people and place. It is therefore no surprise that Council made the decision to invest in a ten-year cultural strategy and this tourism plan should be considered a further iteration of the ambitions set out in the cultural strategy, *A City Imagining*. If we recognise the value of culture to the lives of our citizens then by extension this should be shared with all those who chose to live, work and visit here. Belfast is a city of stories and storytellers. The diversity and richness of many of these stories is yet to be told or experienced.



THE PLAN

Four strategic themes will provide a framework for delivery that initially includes three exemplar catalyst projects. These will be supported by a new investment and governance model with measures of success aligned to the *Belfast Agenda* and *A City Imagining*, ten year cultural strategy. Our ability to work in partnership with government, tourism agencies including Tourism Ireland, Tourism NI and Visit Belfast alongside communities and the tourism sector will be critical to the successful delivery of this plan.

GROW

The role of tourism is critical to **city recovery**. For Belfast this will mean the stabilisation of the tourism industry and the requirement for further growth.

POSITION

This theme seeks to **strengthen Belfast's positioning** in national and international tourism markets - business and leisure - and as a gateway to the region.

EXPERIENCE

Increasing connectivity between existing and planned for tourism assets will improve the overall Belfast Experience, inspiring the visitor to stay longer, return and to recommend the city to others.

SUSTAIN

The **sustainable development** of cities is not just a local imperative it is also a key motivation for the visitor. This theme sets out how we do more, do it better - and together.



Chapter 2

GROW THE INVITATION

Alongside our contribution to the regional economy comes a responsibility to foster collaboration and transcend boundaries. Given the relatively small size of the destination, this is particularly relevant. The recovery potential of Belfast as a tourism destination and economic driver is strong in part thanks to the yet untapped potential in closer-to-home markets including Great Britain and Ireland. We need to keep growing our tourism product and investing in our people in order to answer fast evolving expectations of visitors. We have never had a better opportunity to create an exemplar model for inclusive tourism and in so doing foster the authenticity and vibrancy visitors are seeking. The benefits will be tangible - we need to measure them so that we can maximise them. The value of tourism to Belfast can be shaped by the people of Belfast.



THE CORNERSTONE

Belfast has played an essential role in the success of tourism in Northern Ireland to date and must now be a catalyst for recovery.

- We foster the international attractiveness of the region as a tourism destination
- We are an important part of the Northern Ireland and island of Ireland tourism journey
- We provide half of Northern Ireland's hotel capacity
- We attract higher value tourists and a larger proportion of four and five star hotels, driving tourism spend
- Tourism in Belfast has grown at a faster pace than the rest of Northern Ireland, mainly because of our competitiveness in two high value markets: city breaks and business tourism

The result is that up until 2019, Belfast tourism and hospitality sectors directly supported 19,300 jobs, accounting for one third of the sector in Northern Ireland.

However, we also know that these were the very strengths that left the tourism and hospitality sectors particularly vulnerable to the impacts of COVID-19. Belfast is more reliant on overseas tourism and we will continue to experience the sustained effects of the pandemic on city breaks, cruise holidays and business tourism.

What is critical, is that we address these immediate challenges to ensure that skills, talent and business viability are maintained to support recovery. We cannot lose sight of longer-term ambitions and

should continue to invest in the future through initiatives such as the Belfast Region City Deal to safeguard our forward resilience and potential for growth. The effects of the pandemic are far-reaching and ongoing, however we must ensure that when global tourism returns, Belfast is in a strong position to compete and to continue to increase the attractiveness of the destination.

**1 NIGHT
OUT OF 3**



Belfast accounts for 32% of Northern Ireland's tourism nights

**1 JOB
OUT OF 3**



Belfast supports 31% of Northern Ireland's tourism jobs

**£2 OUT
OF £5**



Belfast generates 40% of Northern Ireland's tourism spend

MORE THAN TOURISM

Belfast should continue to be a catalyst for the development of tourism in Northern Ireland and we need to better understand and monitor our performance as a city. Given the relatively small size of Northern Ireland, the impact of local authority collaboration can have a high impact. What benefits one local area, is likely to benefit another, as a visitor rarely observes strict geographic boundaries. Proposing a diverse and high-quality tourism offering is key to increasing the number of visitors and the average length of stay. In order to understand and grow the full value of tourism, it must be better monitored and measured. We need to move beyond bed nights as a measure of success to understand that the value of tourism can be felt and measured on many levels, providing insights that can inform future investment. We must also consider how Belfast tourism can:

- **Stimulate regional growth:** tracking credit card data rather than just occupancy rates, will help to understand how visitors move between city and region and the contribution of Belfast to Northern Ireland. We also need to better understand the value derived from business tourists who, beyond their conference, often extend their stay both inside and outside the city. In doing so, they become high value leisure tourists.
- **Contribute to wider brand positioning:** Business tourism also supports international attractiveness and foreign investments. World-class professional events contribute to perceived attractiveness as an innovative place to do business. This also contributes to a city's real competitiveness, fostering the development of a knowledge economy, sharing best practice, making business connections and ultimately creating a successful ecosystem.
- **Support inclusive economic growth:** Inclusive tourism, as defined by the UN, creates an environment for all parts of the city to benefit from tourism. This requires analysis to better understand access issues such as geographic or demographic challenges. The result should be a more tailored response to support job creation and skills development.
- **Regenerate cities:** Tourism infrastructure improves connectivity, which in turn creates a more permeable city, with the movement of people that can support further regeneration. For example, these benefits are often evident when considering the relationship between tourism investment and waterfront regeneration. There is a need to better understand this model and extend its application to city centre and neighbourhoods especially as part of the re-imagining of our high streets.

GROW ACTIONS

Actions will be aligned to key success factors to help develop the destination, ensuring short-term recovery and longer-term resilience and growth. This will be measured through the development of new key performance indicators and a city tourism dashboard.

Collaborate

- We must work together to improve the coherency and connectivity of the visitor experience. This should include all parts of the ecosystem such as government departments, Tourism NI, Visit Belfast, Belfast City Council, the private sector, the voluntary sector and other local authorities. Tourists do not recognise administrative boundaries and the NI destination is small. Belfast has a critical role to play in the success of Northern Ireland. This needs to be better understood and measured.

Measure

- We will improve the capture of data, the analysis of performance and the evidence-based approach to decision-making. This new tourism plan must build and establish an evidence base that can then be regularly reassessed and communicated to stakeholders.

Invest

- We will invest in tourism products that can adapt to fast-evolving demand, stimulate tourism jobs and maximise the benefits for locals. Investment will be aligned to the distinctive characteristics of Belfast as an authentic and vibrant place as set out in a new Visitor Experience.

Recover

- We recognise that growth ambitions must be grounded in the stark reality of the impact of COVID-19, not only on the tourism and hospitality sectors, but also on the creative and cultural communities who create the authentic Belfast stories that attract visitors and help position Belfast as a destination. Therefore, we must continue to provide short-term support for the tourism and hospitality sector to protect jobs and maintain the recovery potential of the sector post COVID-19. We also need to look at how innovation addressing immediate needs can contribute to sustainable changes - things like adapting the tourism offering to new visitor expectations (such as open spaces) and new markets that could continue to grow in the medium term (for example, local, GB, Ireland and parts of Europe).

Aspire

- We aspire to be an inclusive, authentic and vibrant tourism destination, with the ambition for Belfast to be recognised as a leading standard globally. The legacy of peace-building and the commitment to inclusive economic growth should be applied to tourism as a contributor to wellbeing.
- Major investment opportunities such as the Belfast Region City Deal, which includes the Belfast Stories (a new tourist attraction), will not only support the visitor economy, they will regenerate the city and improve connectivity. Investment in live events and creative industries, as well as the development of new experiences and infrastructure, can be positive accelerators to move from recovery to transformation.

Chapter 3

POSITION BOLD AMBITIONS

The Belfast Agenda sets out the belief that Belfast can be a city that people dream to visit. A place that is a vibrant, attractive, connected and environmentally sustainable. It also sets out long-term goals to grow the value of out-of-state tourism exponentially and to develop another world-class visitor attraction in the city. We recognise that tourism plays a vital role in the city's economy, its employment opportunities, especially for the young, and its support for small businesses and entrepreneurs. Further brave thinking came out of a setback, when our bid to be recognised as European Capital of Culture was cancelled due to Brexit. Determined to build on the momentum behind the bid, we produced a 10-year cultural strategy, *A City Imagining* that commits to bidding for UNESCO City of Music and to an international year of culture. Initiatives such as these, combined with plans for the new world-class attraction, the Belfast Stories, provide opportunities to put Belfast's people at the centre of our story and to begin talking about the city in a new way to the rest of the world. These signal a new approach to the positioning of our city and our home.



A WAY TO GO

Of course no one knew COVID-19 was on the horizon when these ambitious strategies and plans were developed. The city's growth markets of business tourism, city breaks and cruises have been hit hard by the pandemic. However, early thinking is that Belfast is in a good position to recover post-COVID-19 thanks to our connectivity (especially to potential growth markets in GB and ROI), our strong assets, our authentic experiences and our development plans.

Belfast is Northern Ireland's most-visited destination. More than half (52%) of all visitors to NI visit Belfast. Some 90% of NI business events take place in Belfast. It also encourages visitors to explore NI. In Tourism NI's Visitor Attitudes Survey 2018, 48% of visitors said they were influenced to visit Northern Ireland by the city of Belfast, 38% by Titanic Belfast and 16% by *Game of Thrones* locations.

Belfast has experienced exceptional tourism growth in the past decade. Out-of-state overnight stays to Belfast grew by more than 70% in the five years to 2019. The drivers for this growth were city breaks and business tourism - both high-value markets. Cruise tourism has also contributed: numbers of cruise ships docking in Belfast almost tripled between 2013 and 2019, overtaking Dublin. Belfast is seen as more than a city break for many. Some 42% of out-of-state visitors to Belfast also visited the Causeway Coast and Glens.

However, despite this growth, we continue to face perception challenges. A recent qualitative study across 12 countries found the city "is not yet recognised as having desirable emotional connections". It is thought of as a working city, rather than for one for tourism and a tourist destination, or at most "a work-in-progress" - appealing to early adopters.

Agencies such as Tourism NI and Visit Belfast use common themes in their destination marketing and these are picked up and repeated by the travel media. Yet to date, there is no simple shared positioning for Belfast that would strengthen our image and differentiate us from other UK or European cities. Tourism Ireland uses its emotive proposition '*Fill your heart with Ireland*' while Tourism Northern Ireland has developed its new '*Embrace A Giant Spirit*' brand. The focus of both is on the emotional, human connection.

When it comes to icons associated with Belfast, Titanic and *Game of Thrones* are used frequently - both visually and in words, for example 'Titanic City' and 'Home of Thrones'. While downplayed by the official tourism agencies in consumer marketing, the Troubles are almost always mentioned by external media - differentiating Belfast from other city destinations, but also invariably as a hook to tell the story of how the city has progressed into a peaceful and safe place: a city reborn that's worth taking a look at.

A STATEMENT

We've done a lot of thinking about Belfast's brand and image, especially in recent years. We have invested in both the city brand and a visioning narrative for tourism which have been developed with stakeholders, consulted on with local people and market tested.

Tourism NI has developed a bold new experience brand, 'Embrace A Giant Spirit', to take to market in partnership with Tourism Ireland over the next few years. The marketing and product development investment behind this will help to reposition Northern Ireland as a visitor destination. As its principal destination, it's essential that Belfast should be central to its implementation. Unsurprisingly, there is coherence between these pieces of work. Working with Visit Belfast and Tourism NI, there is an opportunity to ensure that the positioning of Belfast draws on and aligns with this work and investment. As well as the existing consumer-facing brands and narratives, the city needs a positioning statement that can be shared, with and used by, stakeholders to guide destination marketing and development.

The positioning statement is a set of concepts. Bringing these concepts to life - through creative marketing, visitor servicing and product development - will give us a clear competitive position in the market place. The positioning statement is not consumer facing, it is not a strapline, it will not have a logo, it is not marketing copy. It sits 'behind' the visioning narrative and city brand. It is to be used by us as a 'filter' to guide investment in tourism development and to select and shape marketing messages and content - to decide which experiences are developed and taken to market.

It is evidence-based. It draws on market intelligence - on what visitors currently feel and what we predict Belfast's target markets will look for in the future.

Our positioning statement is: **Belfast - a top urban destination on the island and the gateway to Northern Ireland - a city that confounds expectations and rewards curiosity.**

GATEWAY

Positions Belfast as the base from which to explore Northern Ireland and establishes its status as a principal destination and attractor on the island. It provides a strong reason to visit, and to stay longer.

CONFOUNDS EXPECTATIONS

Reflects the research and addresses lack of awareness of the breadth and richness of the city's offer. It challenges out-of-date perceptions of Belfast.

REWARDS CURIOSITY

Promises an intriguing city with layers of stories, a city that repays the effort of making the journey, delivers for the engaged visitor and is ripe for exploration.

POSITION ACTIONS

Plans for Belfast Stories and the themes of *A City Imagining*, already put stories front and centre in Belfast's tourism development and promotion. The task now is to ensure that the tactical implementation of these strategies match the city's positioning statement.

This is about doing things differently, rather than in addition. As a visitor, stories pull you in, hold your attention and create emotional connections. Belfast as a gateway is a win-win- not replacing what we have to offer but adding to it, raising our profile and providing a reason to stay longer. Digital platforms, technologies and spaces are tools that can showcase Belfast. It is interesting stories told by dynamic storytellers, that will lead to the successful positioning of Belfast.

Gateway

By fusing the city and region, Belfast can be seen as more than a city break and can become the gateway to the Northern Ireland experience and a must-see part of the island experience. This requires new levels of collaboration between partners to:

- Develop maps and apps to give an idea of distance and means of travel to places inside and beyond the city limits.
- Produce creative driven, thematic content to showcase regional experiences that have Belfast at their heart.
- Strengthen Gateway messaging on online platforms that promote the city and region.

Curated Stories

If Belfast is a city of stories, then we should provide a storytelling 'stage' in destination digital platforms for the city's players to act on. This moves city marketing from broadcasting orchestrated outputs to being a curator of stories, shifting from 'one voice' to 'many voices' through:

- User-generated content that can be shared via social channels and integrated into websites with incentivised use of hashtags (for example, share your #BelfastStory)
- Curated blogs supported by monthly guest editors, from the recognised name to the local. Contributors should include travel writers, bloggers, conference ambassadors, students, diaspora, experts (such as chefs and artists) photographers and museum curators.
- Third party content should be integrated into websites and shared via social channels

Storytelling Ecosystem

Only a fraction of what leisure and business tourism visitors see is through 'official channels'. It's Belfast stories of real people, delivering authentic experiences that the visitor is interested in. Success will depend on the ability to engage all parts of our tourism ecosystem. To create city ownership we will:

- Establish a stories framework and online platform for the city and link with plans for the new visitor destination - Belfast Stories.
- Provide practical tools to enable creativity and storytelling within the tourism sector that can tap into the visitor's desire for immersive moments that have a strong sense of place.
- Record and publish short videos of businesses telling their #BelfastStory

Chapter 4

EXPERIENCE

WORK HARD

Tourism is an experiential activity. People travel to experience another place, to find out about it and to enjoy what it has to offer. The experiences available in any destination are varied and may mix the exotic with the mundane, the exceptional with the ordinary, the memorable with the forgettable. They may be communal or personal, emotional or practical, significant or slight, good or bad. For the visitor, it is the cumulative impact of the range of experiences encountered in a destination that leaves its mark and dictates whether the visitor will recommend it to others and whether they will return again. For Belfast to be a successful destination, we know that we need to work hard at enhancing and enriching the experiences that we offer to our visitors to create compelling reasons to visit - and visit again.



DEVELOPING THE VISITOR EXPERIENCE

Our engagement with partners identified four priorities for council-led tourism development and support in the next decade:

1. Enhancing and enriching the visitor experience
2. Supporting tourism development across the city's neighbourhoods
3. Strengthening tourism and marketing communications in line with city positioning
4. Supporting skills development to enhance tourism growth and development

As a first step, we commissioned the development of a Visitor Experience Framework for the city which allows the city's tourism partners to agree on a number of unique selling points (USPs) that are authentic to Belfast and to coalesce buy-in for investment in a series of products and/or experiences that will give substance to those USPs. We want to give visitors a compelling experiential offer within a competitive tourism market that lives up to the expectations of new marketing campaigns which will be developed with our partners as part of the delivery of this plan. For our tourism partners, this will mean that investment becomes more focused, with greater potential for return and more opportunities for packaging and developing new experiences.

The Visitor Experience Framework, which has been co-designed with key tourism stakeholders, provides a more focused and co-ordinated approach to product and experience development in the city. This is required if we are to maximise the export opportunity that the tourism sector presents locally. The Framework provides an exciting opportunity to develop, showcase and promote Belfast's destination promise, acting as a catalyst to support the social, economic and physical regeneration across the city and its surrounding neighbourhoods. It acts as the implementation tool for this wider strategic plan and should be considered as part of a collective body of work.

The Framework 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.
- Centre around immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.



BELFAST VISITOR EXPERIENCE FRAMEWORK



EXPERIENCE ACTIONS

Expanding our experience mix

- Titanic Belfast continues to act as the main attractor for the city, drawing visitors to Belfast. To enable Belfast to recover and grow, we need to get visitors to stay longer. This makes sense from both an economic and environmental perspective. Therefore we must make sure there is enough visible product in order to extend the dwell time of the visitor in the city and allow Belfast to compete with other city break destinations. This can be achieved through developing anchor and ancillary experiences to create a more coherent, accessible and compelling proposition for the visitor.

Connecting our neighbourhood tourism offer

- An impressive neighbourhood-based tourism offer has been developing in recent years. But for the visitor, this continues to come across as fragmented. Through clustering and capacity-building, there's an opportunity to uplift these individual experiences to be more market-focused. The relationship of smaller experiences to each other, and to the main city attractors, should be strengthened.

Better utilising our existing assets

- Belfast is rich in natural assets with the rivers and hills and characterised the physical landscape, although these remain largely under-utilised. Ongoing and planned development is taking place as part of the Maritime Mile, but there's an opportunity to build further on this. Greenways and Blueways have the potential to become an important part of the city experience and to change perceptions of Belfast. Accessibility of the Belfast Hills continues to be a challenge, but there's the potential to develop supporting products as part of a longer-term infrastructure plan.

Overcoming navigation challenges

- Despite the compact nature of Belfast, it's not an easy city to navigate without a car. The introduction of the Glider has improved this, but more work should be done to develop walking and cycling routes and to increase awareness and confidence through improved signage and wayfinding.

Animating our arrival experience

- First impressions count. Arrival and departure gateways are an important part of the overall visitor experience, not only in terms of providing information but establishing a connection with a place. Working with airports, harbour, rail and roads authorities, we can better animate these spaces through improved public realm and visitor servicing.

Developing capacity and skills

- The Belfast welcome is recognised as one of distinctive characteristics of our city destination. However, there's a need to build on this to create a consistency and reliability in the delivery of experiences. A long-term skills development plan to increase creative and technical capacity is required. This will ensure the quality of the visitor experience is also recognised as standout.

Addressing specific gaps and opportunities

- Further plans need to be developed to support the implementation of the Visitor Experience Framework. This should include priority areas such as a Food Tourism Actions to support the recovery and long term success of Belfast's hospitality sector as a contributor to Belfast's success to date. We must make clear commitments to accessible and inclusive tourism and this will be set out in a detailed and co-designed plan.

Chapter 5

SUSTAIN WELLBEING

Cities across the globe have been challenged by tourism. Some have been overcome with a volume of consumption that has left local residents hostile and infrastructure overrun. For others, the economic stimulus of the visitor economy remains elusive. Belfast was undoubtedly on an upward path, outpacing the rest of Northern Ireland. The COVID-19 pandemic has interrupted this exponential growth. However in doing so, it has provided a breathing space to ensure that tourism development and growth can align to the city's priorities of resilience and sustainability and deliver on the people-centred vision of the cultural strategy, *A City Imagining*. In line with new global thinking, this plan seeks to move beyond the 'do no harm' model, to a regenerative form of tourism that contributes to the economic, social and environmental wellbeing of our city.



GLOBAL DESTINATION SUSTAINABILITY INDEX

This theme will be driven by recommendations emerging from the benchmarking completed as part of Global Destination Sustainability Index (GDS-Index). In 2020, Belfast City Council agreed to sign up to the GDS-Index, the 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. This includes 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.

In 2019, over 60 cities had 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:

**CITY
ENVIRONMENTAL
PERFORMANCE**

**SUPPLIER
PERFORMANCE**

**CITY SOCIAL
PERFORMANCE**

**DESTINATION
MANAGEMENT
PERFORMANCE**

PROGRESS

The roadmap for Belfast identifies two areas where Belfast City Council can make significant difference. The first is by taking on a clear leadership role, including advocating for the importance of sustainability. With this comes the commitment to lead through action, including in the management of our own assets and in making sure that city data is captured and performance is measured.

The Resilience Strategy gives us an excellent framework to do this. The challenge will be to uplift the importance of tourism in the implementation of this strategy and in future emergency planning. To help lead this work we will create a tourism taskforce.

Council's second critical role is to support capacity building by creating the conditions and incentives supporting city suppliers to adopt sustainable models of best practice. This will be a phased approach, recognising the challenges whilst articulating the benefits of regenerative tourism. In support of this we will create a sustainability lab for tourism to foster collaboration, develop new approaches and design legacy initiatives.



SUSTAIN ACTIONS

To support the ambitions of delivering a regenerative tourism model for the city, a number of actions will be delivered. These actions will directly improve Belfast's ranking on the GDS-Index.

Leadership

- Establish a regenerative tourism taskforce aligned to Belfast's Resilience Strategy.
- Work with Tourism NI and Visit Belfast to develop a regenerative tourism dashboard for the city with long-term commitment to research and data collection.
- Position sustainability as part of city positioning, celebrating best practice and developing clear messaging.

Destination management

- Support Visit Belfast to complete certification and include sustainability Key Performance Indicators aligned to UN's Sustainable Development Goals as condition of funding from 2022.
- Work with local organisations to gain accreditation and develop sustainability plans.



Suppliers

- Develop a certification strategy with appropriate tiers including the following targets:
 - 50% of hotels by 2023.
 - 40% of wider hospitality and accommodation sector by 2023.
 - 60% of funded cultural organisations by 2023 rising to 100% by 2025.
 - 50% of funded event organisers by 2023 rising to 100% by 2025.
- Integrate sustainability credentials in recovery funding to unlock financing for industry development.
- Provide direct support to ICC Belfast to complete certification by 2023 including retention targets.

Food and drink services

- Organise training on sustainability for restaurants and caterers.
- Create a sustainability lab to accelerate circular thinking, policy and initiatives among hotels and restaurants.
- Promote and incentivise sustainability certifications for restaurants and caterers.

Partners and visitors

- Support partners with ideas and resources to support local social, environmental or economic causes and projects.
- Develop a corporate social responsibility policy for the city, to encourage visitors and partners to contribute to social and environmental wellbeing.





Chapter 6

CATALYSTS

LEGACY

We have identified three catalyst projects which we believe have the potential to be living exemplars of the vision, principles and themes set out in this plan. Each project has been designed to deliver, not simply due to scale, but rather a lasting and sustainable impact that can only be derived from strengthening, supporting and enabling our city to tell its story to the world. The legacy of this plan will be its contribution to create a new environment for creativity and enterprise to thrive. In particular, these projects are a statement of intent by Belfast City Council to continue to invest in delivering the ambition of the Belfast Agenda - for Belfast to be a culturally vibrant and welcoming city.



1. OUR PLACE

Developing local tourism

Regenerative tourism is driven by the relationship between people and place. The strategic themes of this plan uplift the importance of community in the context of tourism - and in particular, the relationship between the visitor and the host.

For a number of years, Belfast has had aspirations to take forward a community tourism framework. However, the risk with this approach is to create a hierarchy of importance - a two-tiered system defined by geography or theme. This has now been superseded by a new appreciation of the symbiotic relationship between city centre and

neighbourhoods, city and region, local and global. This plan places community at its heart. Respect for the local context, to ensure tourism-derived benefits are shared and inclusive, is evident in all four of the strategic themes - *Grow, Position, Experience and Sustain*.

As exemplars of the themes, all catalyst projects are designed to be people-centred. However, there is a need for a specific programme to support the development of local or neighbourhood-based tourism experiences. Neighbourhoods are uniquely positioned to offer the visitor the immersive experiences they are seeking:

**Celebrating
local culture,
heritage and
enterprise**

**Accessing
open and
green spaces**

**Co-creating
authentic
Belfast
experiences**

**Enjoying
day to night
food and
hospitality**

The Belfast Region City Deal identifies tourism as a key pillar. As part of this major programme, Belfast Stories will be the city's flagship investment in product development in the city. We want to make sure this investment maximises the potential for citywide, inclusive growth in Belfast. To do this,

we believe that it's critical to work in partnership to develop plans that build capacity for city neighbourhoods to meaningfully connect into the emerging broader tourism offer and to enable these local communities to become part of the Belfast visitor experience.



PRIORITY PROGRAMMES

This is both an exciting and challenging opportunity for stakeholders across a diverse range of sectors (tourism, public and private, culture, art, heritage, sport, community and voluntary) to engage in the process of co-designing authentic and sustainable cultural tourism products that will bring vitality to their own neighbourhoods, local residents and visitors alike. To this end, we propose that support should focus on the two main areas of infrastructure and product development. These programmes should support the development of community tourism both in terms of geographic communities but also communities of interest and thematic clustering. This is in addition to the actions set out under the four strategic themes contained within this plan.

INFRASTRUCTURE

- **Support for visitor servicing and information access points across the city** - including support for visitor servicing based in local areas.
- **Quality and innovative signage, interpretation and wayfinding** - including developing new digital approaches.
- **Developing Council owned visitor attractions, parks and open spaces** - including experience development plans for Belfast Castle, Belfast Zoo, Malone House, Templemore Baths, the Tropical Ravine and Palm House, and cemeteries including the City Cemetery.
- **Inclusion of tourism as a priority in the Neighbourhood Regeneration Fund**

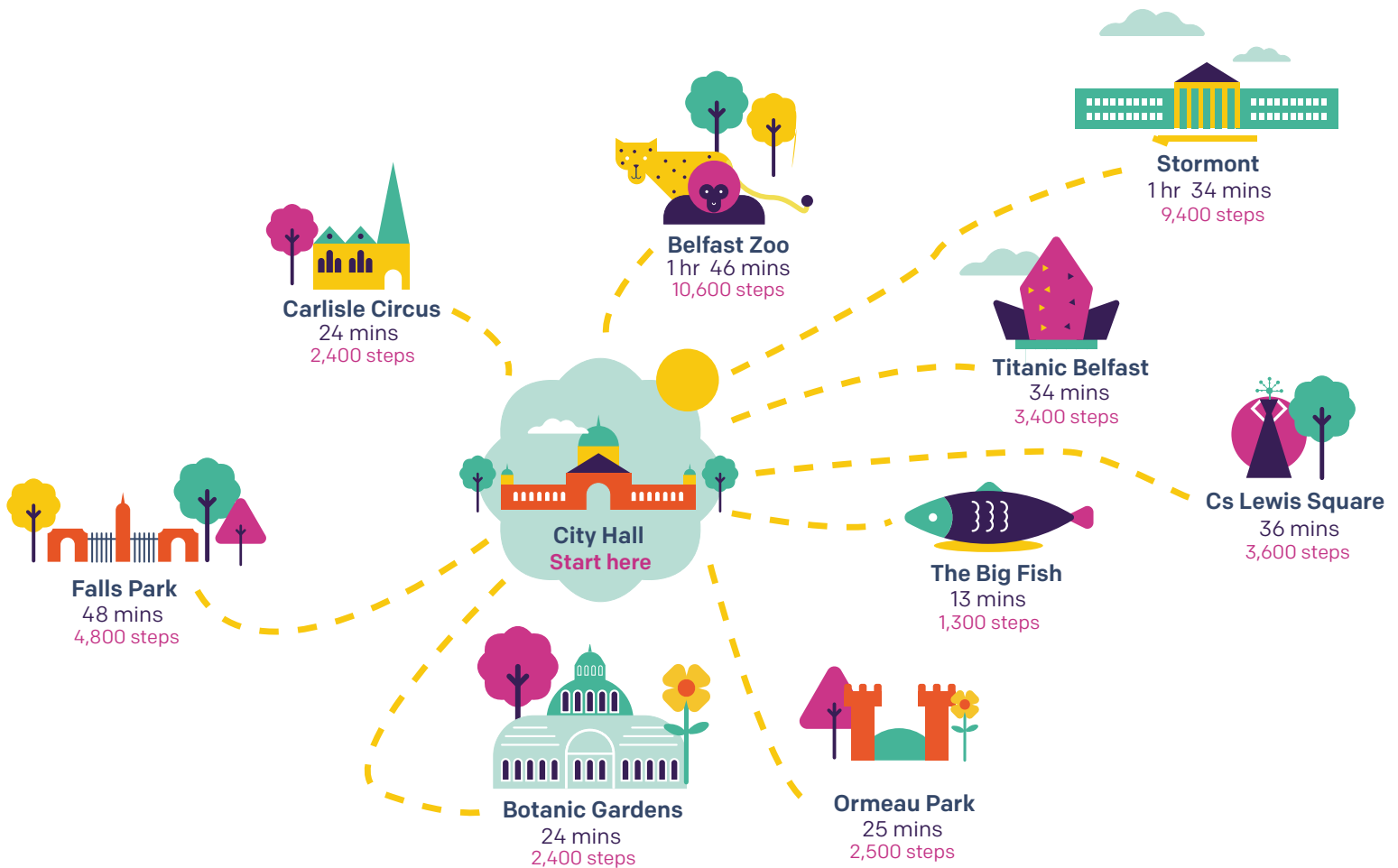
PRODUCT DEVELOPMENT

There is an opportunity to enable local communities to tell their stories and in so doing, create tourism experiences that respond to market research and consumer demand. Current trends are for experiential products and packages offering ease of access and a high-quality visitor experiences. Walks, trails and tours can package multiple products into an attractive and connected 'experience' within neighbourhoods. In order to facilitate product development in city neighbourhoods, we will launch an Experience Development Fund. This will support the development of tourism 'clusters' including:

- **Support from tourism experts to enhance existing products or research, or to develop and pilot new products that maximise opportunities to link with the wider city offer and ensure customer and market-led focus.**
- **Investment to bring these products to market.**
- **Long term capacity building to ensure all parts of the city have the opportunity to benefit from tourism investment.**

This programme will be implemented as part of the Belfast Visitor Experience Framework.

GET LOST... IN BELFAST





2. MAKE YOURSELF AT HOME

Establishing Belfast as a cultural destination

Belfast's cultural strategy, *A City Imagining*, recognises the importance of events and programming to the wider cultural and tourism profile of Belfast. Events can tell stories, connect people and present new perspectives on our place. As cities emerge from COVID-19, consumer sentiment research is already indicating that events will take on a new significance as motivators for travel and an opportunity for destinations to differentiate their offer. Events can create immersive spaces for the visitor to become part of an ever-evolving story.

The cultural, social and economic impacts of events cut across all areas of the Belfast Agenda. In 2017 the decision to bid for the European Capital of Culture indicated that there is a desire to enhance the quality and ambition of the cultural offer in Belfast through closer partnerships within the city, across the region and internationally. Importantly, the process revealed the creative potential of our city that could be realised if we had an environment where ambition was encouraged and rewarded. Since then, there have been high levels of support for a designated year of culture for Belfast. There has been recognition that in order to maintain civic momentum, secure buy-in from city partners and build the capacity of our cultural sector, a well-considered, well-planned cultural programme of scale and ambition is critical. These plans had originally focused on 2023, however with the impacts of the COVID-19 pandemic ongoing, we believe that we should take the time to recover, to dig where we stand and to rebuild the city from the assets that surround us. We are therefore setting out a six-year multi-annual approach with a renewed commitment centred around the need to invest in our creative communities.

The benefits of events and cultural programmes to cities are considerable. Many cities have used events to engage with local people, build civic pride and transform their reputation internationally. Events are one of the best ways to measure the economic, social and environmental impact of tourism as they bring together a cross section of city stakeholders. Importantly they also have the ability to create legacy.



THE PROGRAMME

In 2021 we will launch a programme designed to build momentum towards a year-long celebration of culture and Belfast stories in 2024. There will be important cultural milestones in 2022 and 2023 as Belfast plays host to a number of significant and ambitious projects. Belfast will be home to international events such as One Young World, the leading global event for young leaders, as well as the global Music Cities conference, and the city will be transformed into a forest of creativity in partnership with the Eden Project Cornwall.

The target will be to restore the international visitor economy to 2019 levels by 2024 and to help competitively position Belfast to move into a new phase of growth. This next phase of development will take us to 2027 and the opening of the new visitor destination - Belfast Stories, marking the establishment of Belfast as a cultural tourism destination. This sustained programme of activity, further reinforced by our own annual calendar of signature events, will help attract visitors back to our city, providing a much-needed boost for citizens as well as the cultural and hospitality sectors, and the wider tourism industry.

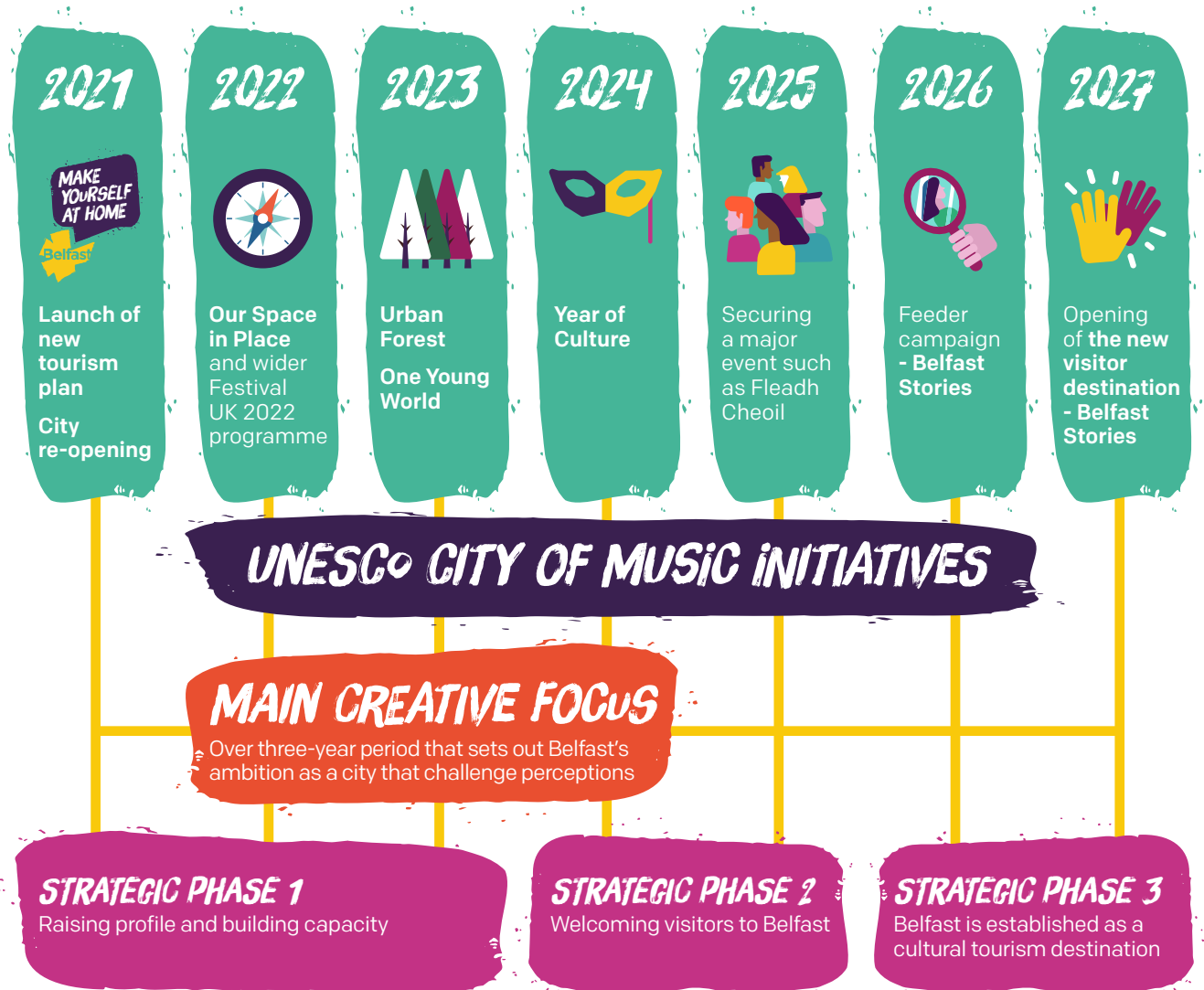
Importantly, this approach to long-term planning for events will be an exemplar for the four strategic themes of this plan: *Grow, Position, Experience and Sustain*. These events will:

- Directly contribute to the growth of the tourism industry in Belfast through an increase in out of state visitors, dwell time and spend.
- Challenge perceptions of Belfast and raise awareness of the diversity and richness of the city's culture, arts and heritage.
- Create authentic and contemporary Belfast Experiences of quality.
- Establish a model for carbon neutral activity.

Events of this ambition have the potential to be truly transformative. They will tell contemporary Belfast stories with an unprecedented international reach by fusing digital and real-life experiences. They will leave a lasting legacy of skills and capacity that will support future generations of tourism ambassadors, creative talent and storytellers. *Make Yourself at Home* takes the ambitions set out in our cultural strategy, *A City Imagining* and makes them real - Belfast will be an Urban Forest, a UNESCO designated music city, the meeting place for our global young leaders - and so much more.



MAKE YOURSELF AT HOME



3. OUR STORIES

Introducing a new visitor destination

Imagine if there was a unique place in the heart of Belfast. A place where real stories of love and loss, conflict and peace, history and hope are told by the people who have lived them. A place where you not only get a true sense of the city of Belfast - past, present and future, but also gain new insights into the basic human needs of belonging and homeland. A place where age old stories of identity are told in a new way - a way that looks forward. A place that embodies the best of Belfast.

Belfast Stories is a transformational project designed to capture the unique spirit of Belfast. This major regeneration and tourism anchor will help revitalise our city centre, allowing people to connect with the city and one another through stories, screens and social spaces.

The beating heart of the new attraction is a visitor experience that tells the remarkable first-person accounts of the city by the people who call it home. Stories spill out into every aspect of the venue including the new state of the art Belfast Film Centre, offering specialist cinema content from NI and around the world.

Within the new visitor destination - Belfast Stories, an integrated cultural, educational and commercial screen industry centre will provide working, networking and training facilities to ensure Northern Ireland's screen industry continues to grow and foster new creative talent.

This new destination will be connected by dynamic architecture and vibrant public realm, allowing for lively event programming and conversation. It will offer the best of our local food and drink as the stories of Belfast unravel through all areas. The rooftop urban park and restaurant will present 360° views over our vibrant metropolitan city.



Artist impression



Artist impression



THE AMBITION

We believe Belfast can be a leading cultural visitor destination. Belfast enjoys a strength in its current gateway role for NI and Ireland. Belfast Stories will be a tourist attraction; a cultural beacon for the city; an anchor for the wider Belfast experience and a place of orientation for visitors to the region.

Successful regions have strong and vibrant cities at their core. Belfast is no exception as the city drives much of the economic growth and shares its wealth across the region. Through the Belfast Regional City Deal, we have the opportunity to fulfil our plans to create a significant and complementary star attraction in the city centre, providing more reasons for people to visit and things to do, while supporting new and better jobs.

In a very competitive global tourism marketplace, we know that the only true differentiator is Belfast: its story, its character and its people. Following thousands of conversations with the Belfast citizens over the last five years, we know that Belfast is ready to share its stories with the world in innovative ways and to celebrate the place we call home.

The new visitor destination - Belfast Stories will bring an economic and financial return for Belfast, but the benefits stretch way beyond the direct dividends of

a new tourist attraction. Clustering is a well-tested and long-established concept in cities across the world, with growing relevance to tourism and city centres. It provides both operational benefits and wider enhancements to the brand and appeal of the components parts through increasing footfall, providing economies of scale, promoting cross-pollination of ideas and revenues resulting in a greater impact than the sum of the parts.

As global competition increases, Belfast Stories will support Belfast in its role as the gateway to the region. It will support recovery and drive a new approach to inclusive growth and the region seeks to re-establish ambitions for a £2 billion tourism economy by 2030.

Our plans for Belfast Stories are ambitious, inclusive and support the plans for the Belfast we want to create.

THE IMPACT

PRODUCING £15 MILLION RETURN

Estimated annual tourism GVA benefit (not including indirect or induced benefits).

WELCOMING 700,000 VISITORS

Annual visitors to Belfast Stories, Screen and Skills.

CREATING 1,400 JOBS

Direct 132 FTE with 243 in the wider economy and 1,064 in construction.

Chapter 7

MAKING *it* HAPPEN

There is an impetus to make change happen that is shaped both by the urgency created by a global pandemic and the organic evolution of a city increasingly confident of our place in the world. The challenges and opportunities that this presents can be reconciled through innovation. Throughout the strategic themes and proposed catalyst projects, we have sought to move forward with new approaches to tourism development that build on the successes of the past. However, innovative approaches and new thinking are required for how we do things (differently) as much as they are for what we do. The principles of being people-centred, responsible and sustainable are therefore applied to putting this plan into operation - through setting out proposed models of collaboration for governance, investment, skills development and measuring success.

Partnership will be critical to the success of these plans. This will require greater collaboration between main agencies such as Council, Tourism Ireland, Tourism NI and Visit Belfast as well as a new ways of working with tourism businesses, cultural organisations and the community sector. This will include both a thematic and place based approach to development and delivery, directly recognising the important role of organisations such as Maritime Belfast Trust, Fáilte Feirste Thiar and Eastside Partnership as well as the business improvement districts. It also recognises that there are areas of the city where this capacity and infrastructure needs developed and neighbourhood based assets will be an important way to do this.



GOVERNANCE

Effective governance is critical to the successful implementation of this plan. This will help provide clear ownership of actions and will support the optimal collaboration and coordination between a complex group of stakeholders including the tourism sector, government, business and community and voluntary sectors. The incentive for city stakeholders is to collectively ensure that tourism is positioned as a major city driver, generating economic activity and employment, and serving as a powerful instrument for city and regional development that will support inclusive growth and social wellbeing.

Rationale

- The actions set out in this plan will be championed by Belfast City Council, but their implementation will require the close collaboration of different partners. We know that we will need partnership working across the city and region. This tourism plan sits under the Belfast Agenda and as such, we must continue to commit to developing multi-stakeholder city models of delivery.

Structure

- A City Leadership Group will be established to ensure that the importance of tourism is recognised and championed as part of city recovery.
- An Implementation Group will be set up to drive forward progress on the actions set out in this plan.
- The Implementation Group will bring together senior representatives of the tourism industry, the public sector, the wider business sector and community and voluntary sectors. These representatives should have the agency, influence and commitment to deliver this plan and make change happen.
- The Implementation Group will be established for a fixed period of no more than three years. A review

will be carried out at the end of this period with recommendations for the future.

- A Tourism Futures programme will also be established to support new ambassadors and leaders that will have a voice in shaping tourism development in the city.

Process

- The Implementation Group will report on progress, achievements and deliverables at six monthly intervals. Belfast City Council will co-ordinate reporting, working with partner organisations involved in the delivery of individual actions. A particular focus will be on emerging barriers or constraints that challenge progress against actions and developing solutions to overcome these.
- An annual Tourism Stakeholder Forum will be convened to share insights and understanding on performance to date and on measures that need to be introduced to accelerate progress or to address issues. An Impacts Report will be published annually alongside results of an attitudinal survey of residents on the benefits of tourism.

INVESTMENT

The ambitions set out in this plan will require a new way of working and investment in people, product and place.

The Belfast Region City Deal is a transformational investment programme that includes a cross-cutting Employability and Skills pillar that supports other pillars like Tourism and Regeneration. There's a need to support recovery and growth through tailored interventions delivered alongside tourism and skills development partners. The catalyst projects in chapter 6 require dedicated investment strategies (which are underway). We also need year-round investment aligned to the plan themes.

Grow. Investing in a new research and data-driven tourism approach including:

- Establishing an evidence-based proposition that Belfast acts as the regional catalyst.
- Measuring 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 spend.
- Evaluating accelerator or catalyst project impacts.
- Broadening 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.

Position. Investing in a new approach to marketing and communications including:

- Enabling the people creating the Belfast experience to tell their story.
- Uplifting Belfast's USPs in campaigns and initiatives with specific support for Belfast's authentic food and drink offer and UNESCO City of Music bid.
- Extending Belfast's reputation as a welcoming city to ensure inclusivity of all potential visitors. This includes working with the industry to create an Accessible Tourism plan.

Experience. Belfast's ability to develop the visitor experience will be critical to attracting more visitors and increasing length of stay. This will require prioritising tourism within infrastructure programmes and launching a new Experience Development Fund including:

- Developing experiences that can be brought to life through a mix of 'anchor' and ancillary products that get people into an area and keep them there.
- Focusing 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.
- Delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.

Sustain. Belfast's Global Destination Sustainability Index benchmarking provides a roadmap for change. There is now a need to invest in the implementation of recommendations including:

- Developing results-driven plans for council assets including working with ICC Belfast to secure accreditation.
- Developing a tiered certification strategy for suppliers including funding support to help / incentivise suppliers achieve 3rd part accreditation.
- Sustainability training for suppliers with tailored programmes for food and drink industry and events sector.
- Include sustainability criteria and KPIs in funding contracts including Visit Belfast.

Advocacy. The future of tourism in Belfast and the region requires innovative approaches to investment and collaboration. While areas like passenger duty and visitor levies are not within the remit of the Council, we'll adopt policy positions based on up-to-date research and evidence.

SKILLS DEVELOPMENT

Like all cities, our greatest asset is our people. Tourism is very much a ‘people business’ and the visitor experience is highly dependent on the interactions with those who work across a range of customer touch points.

With almost 20,000 employees in 2019, tourism and hospitality is a significant employer in Belfast. The sector was devastated as a result of COVID-19 and is slowly emerging from a series of restrictions that required operators to put new ways of working in place to ensure compliance and address customer safety concerns. It's likely that the sector will continue to need support for some time to build back, given the likelihood that some restrictions may remain in place.

Outside of the challenges created by the pandemic, the tourism and hospitality sector was already facing staffing and skills challenges as a result of the UK's exit from the EU and the associated changes to migration policy which made it more difficult to attract talent to the sector.

As we move towards a rebuilding of tourism and hospitality in Belfast over the coming years, there are a number of priority skills interventions that will be required to ensure that there is both the volume and level of supply to meet the projected demand and deliver on our ambitions for growth.

Our priority areas of intervention will include:

Enhancing the attractiveness of the sector to new talent:

- This will entail working with businesses to look at how tourism and hospitality can be seen as a sector of choice, where employees can enjoy fulfilling careers. In addition to selling some of the existing

advantages, it may also require work to look at issues such as terms and conditions, working patterns and progression pathways, with the aim of attracting a wider profile of entrants into the sector.

Building management skills:

- The sector will require strong leadership to bounce back from the recent challenges. This will involve additional investment in management and leadership skills for existing staff. There will also be a growing demand for additional leadership investment in order to explore new business models, build strong teams and deliver customer excellence to underpin our world-class experiences.

Business resilience:

- COVID-19 exposed weaknesses across many sectors in fields such as digital technology. As visitor expectations change and the user experience evolves, it is essential that businesses and their employees are skilled in the use of these technologies- and that they explore how they can give their business a competitive advantage.

Entry and progression pathways:

- We have had some success through our Employment Academy model, helping businesses to meet their workforce needs. We will continue to work with local companies to ensure that they can have access to a strong pipeline of talent, creating both entry and progression pathways to fulfilling careers in sustainable and dynamic businesses.

MEASURING SUCCESS

An interactive city dashboard will be created with Key Performance Indicators developed to include:

- Number of jobs supported and economic impact
- Number, origin and type of visitor
- Occupancy rate of hotels and number of rooms per type
- Mapping of rooms in alternative types of accommodation (for example, Airbnb) including volume and average price
- Number, size and economic impact of business tourism events
- Quality of the experience (for example, proportion of attractions with Trip Advisor Certificate of Excellence or equivalent)
- Overall GDSI index rating

WHAT WE WILL DO

Grow

- Analyse available data to help understand the economic impact of visitors and their movements in and beyond the city. Currently, data based on occupancy bed nights does not accurately reflect the economic contribution of the day trippers who stay in Belfast but visit the rest of NI during the day.
- Explore and implement effective ways to analyse the real value of business tourism.
- Benchmark tourism monitoring reports of other cities to understand best practice.

Experience

- The key source of qualitative data has traditionally been the Visitor Attitude Survey carried out by Tourism NI. There is an opportunity to complement this and maximise the development of qualitative data on social media and through other online tools.
- Qualitative data will include the visitor experience, consumer satisfaction, product gaps, Belfast's USPs and stand-out experiences.

Position

- Survey the top five words that come to mind of visitors to track the changing perception of Belfast and NI and analyse how visitor behaviours are evolving. This will inform investment decisions and enable the respective tourism offerings of Belfast and the rest of NI to complement each other.
- Media monitor over longitudinal period to analyse what other people are saying about the city, including key words from the positioning statement.

Sustain

- Ongoing participation in the Global Destination Sustainability Index to monitor Belfast's progress against regenerative tourism targets and sustainability credentials. Performance will be measured in the following areas: Environmental (city), Social (city), Destination Management and Suppliers.
- Conduct an attitudinal survey of residents to help assess the perceived and real value of tourism.
- Produce an analysis per social group and per neighbourhood to assess access to tourism benefits and inform initiatives that support jobs, skills, training or increased event access.

WHAT HAPPENS NEXT...

Make Yourself at Home is an invitation that welcomes the visitor to Belfast. It also invites the people of our city to get involved, to tell our stories and to shape how tourism is delivered over the remainder of this decade. We hope that this draft plan will build on the work undertaken during the development of our cultural strategy and signal a new approach to developing and engaging with tourism in Belfast. We completed a 12 week public consultation in February 2022 and we've taken feedback on board as we now move to implementation of these ambitious plans. This vision for tourism places people at the heart so we will be following through on our commitment to an ongoing process of engagement, collaboration and partnership working. Should you require the document in a different format please email culture@belfastcity.gov.uk with your request.



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