Document Pack

Democratic Services Section
Chief Executive's Department
Belfast City Council
City Hall
Belfast
BT1 5GS

17th November, 2011

MEETING OF DEVELOPMENT COMMITTEE

Dear Alderman / Councillor,

The above-named Committee will meet in the Lavery Room (Room G05), City Hall on **Tuesday, 22nd November, 2011 at 5.15 pm.**, for the transaction of the business noted below.

You are requested to attend.

Yours faithfully

PETER McNANEY

Chief Executive

AGENDA:

1. Routine Matters

    (a) Apologies

2. Marketing Belfast

    (a) Belfast Visitor and Convention Bureau / Presentation (Pages 1 - 88)

    (b) Deputation from Belfast Visitor and Convention Bureau

3. Neighbourhoods, Communities and People

    (a) Draft Framework to Tackle Poverty and Reduce Inequalities (Pages 89 - 110)

4. Shaping Belfast

    (a) Renewing the Routes Initiatives - Future Plans (Pages 111 - 120)

    (b) B-Team (Pages 121 - 130)

    (c) Glen Road Development Framework (Pages 131 - 136)

5. Belfast's Economy

Agenda Item 2a

Belfast City Council

Report to:	Development Committee
Subject:	Belfast Visitor and Convention Bureau Monitoring Report
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	**Relevant Background Information**
1.1	It was agreed by Members at Development Committee of 22 February 2011 to contribute £1,865,465 towards Belfast Visitor and Convention Bureau's (BVCB) marketing and visitor servicing plans in 2011/2012. Financial support goes towards the following activities: Marketing and Communications £1,336,000 Visitor Servicing £529,465
1.2	The Tourism, Culture and Arts Unit within Development Department is responsible for developing and marketing Belfast as a tourist destination. The unit delivers a range of product development initiatives (e.g. Belfast Music Week), manages the visitor signage, undertakes the Belfast Tourism Monitor research and delivers £1.4 million funding to the culture and arts sector to animate the city (for visitors and citizens). Marketing and visitor servicing are outsourced to BVCB to deliver.
1.3	In summary, BVCB are responsible for: - Attracting conferences to the city - Delivering co-operative campaigns in key markets e.g. working with the retailers to target the ROI market and working with air and sea carriers to target the GB market - Attracting cruise visit - Servicing visitor enquiries - Booking facility for accommodation providers, venues, festivals and events - Producing a range of marketing materials including destination guides and the gotobelfast.com website - Advising members on opportunities - Promoting Belfast as a day trip destination via above the line and tactical advertising

1.4	The key activities above are grouped under Leisure Tourism, Conference Bureau and Visitor Servicing.
1.5	BVCB is a public/private sector partnership with over 500 private sector members. The main funders are BCC and the Northern Ireland Tourist Board (NITB). Funding from these two organisations allows BVCB to lever additional funding from the private sector through joint marketing initiatives and this represents good value for money for BCC. In 2009/10 period total private sector income was £1,086,578.
1.6	The BVCB Board is representative of the sector and includes both private sector and elected representatives from Belfast City Council. Other councils also make smaller contributions but have no representation on the board. NITB sits as an observer, as do a range of interests including retail sector representatives.
1.7	The Development Committee on the 28 September 2011 received a BVCB performance and monitoring report (appendix 1). It was noted that the Northern Ireland Tourist Board financial contribution to BVCB has decreased and it was considered prudent to further evaluate how BVCB are measuring their performance based on the return of investment from its core funders. Members agreed to invite representatives from BVCB to present to the Committee on how their campaigns are meeting agreed targets and objectives.
1.8	It was noted that the permanent re-location of the Belfast Welcome Centre was a priority which needed to be fast-tracked.
1.9	The top line targets outlined in the Belfast Integrated Strategic Tourism Framework (BISTF) http://www.belfastcity.gov.uk/tourism/ by 2014 are: – 40% increase in overnight visitors to 2.38 million – 20% increase in bed-nights to 4.7 million – 20% increase in spend to £294 million
1.10	To reach these targets as outlined in the BISTF requires a joint effort between Belfast City Council, BVCB, Northern Ireland Tourist Board (NITB), Tourism Ireland and the private sector. To achieve these targets BCC has established an Officers Working Group involving BVCB, Belfast City Centre Management (BCCM) and NITB as well as a larger Belfast Tourism Forum with members from all industry bodies, tourism agencies and government departments. These groups are focused on the implementation of an Action Plan which has been developed from the BISTF and looks at infrastructure, product development, skills development and marketing.
1.11	In addition to the joint working groups officers meet BVCB on a regular basis to discuss progress of their plan and sit as observers on the Board. Eight Members of Belfast City Council are Directors on the Board of BVCB. A formal review of progress is undertaken by officers on a quarterly basis.

2	**Key Issues**
2.1 2.2 2.3 2.4 2.5 2.6 2.7	<u>NITB Funding</u> NITB funding has been reduced from £600,000 to £416,667, with the main impact on Leisure Tourism Marketing, which they no longer support (a decrease of £175,000). NITB has increased support towards Business Tourism Marketing and continue to support Visitor Servicing, although the latter on a decreasing scale. NITB has given a commitment to fund BVCB up to 2015, subject to budgets prevailing and satisfactory performance. <u>Relocation of Belfast Welcome Centre (BWC)</u> BVCB have been leading on a visioning paper and business model for the Belfast Welcome Centre relocation. NITB has indicated that they will support a proportion of the capital costs (up to £1 million) for the relocation of the Belfast Welcome Centre (subject to application and appraisal) on the basis that any move would contribute to the BWC being more financially viable and less dependent on public funding. The vision and business case will be presented to the SP&R committee in order to seek capital contribution from BCC. BVCB commissioned a marketing and visitor servicing plan in 2010 (attached as appendix 2). This plan outlines a number of challenges for tourism in Belfast and for BVCB. Officers believe the following to be the most prominent: <u>Digital Marketing</u> The tourism sector has been revolutionised by digital media and marketing. BCC and BVCB have developed a series of iphone apps, developed skills in social networking and invested in upgrading websites. As the destination marketing agency for the city, it is critical that BVCB is a leader in the technology used by the city's visitors – both in the market place and in the destination. This is a challenge for a small organisation, however a priority for the city. <u>Addressing market decline</u> The GB leisure market and the overall business tourism market have been in decline. Both mainly due to the economic recession, increased competition and access to Belfast/Northern Ireland. BVCB require specific, measurable and targeted activity to address these specific areas. <u>Influencing Marketing Spend and the Belfast message</u> BVCB must develop a strong influencing role to ensure that Belfast is positioned appropriately within both NITB and Tourism Ireland marketing activity. It is important that the council and BVCB influence the NITB's £2million marketing budget as well as Tourism Ireland's £20 million marketing budget to ensure the city can deliver the step change that 2012 and 2013 creates the platform to achieve. <u>Focus Activity and better integration</u> BVCB need to prioritise market segments and activity. As a city we need to know exactly who we are targeting, set realistic growth and monitor performance. Belfast City Council invests in events, product development and also carries out marketing and communications activity. It is critical that BVCB align activity to support Belfast City Council's investment into events and tourism product and there are agreed roles and responsibilities as to marketing activity.

2.8	<u>Research and Evaluation</u> This remains an important issue to be addressed at multiple levels. This will require a joint approach between Belfast City Council, BVCB, NITB and DETI (NISRA). While research is required to measure visitor satisfaction levels, more focused research will be necessary to monitor BVCB's specific marketing campaigns to monitor the return of investment.

3	**Resource Implications**
3.1	<u>Financial</u> Next instalment of BVCB's funding, £759,500 has been released. Committee approved the overall contribution of £1.865 million which is included in Departmental budgets for 2011/2012.

4	**Equality and Good Relations Considerations**
4.1	There are no specific equality or good relations considerations attached to this report.

5	**Recommendations**
5.1	Members are asked to note the contents of this report and: – Receive the presentation from BVCB.

6	**Decision Tracking**

The next performance report is due back in January 2012.

Timeframe: January 2012 Reporting Officer: Shirley McCay

7	**Key to Abbreviations**

BCC - Belfast City Council
BCCM - Belfast City Centre Management
BVCB - Belfast Visitor and Convention Bureau
BWC - Belfast Welcome Centre
DETI - Department of Enterprise, Trade and Investment
NISRA - Northern Ireland Statistics and Research Agency
NITB - Northern Ireland Tourist Board

8	**Documents Attached**

Appendix 1 – Performance and Monitoring Report April – September 2011
Appendix 2 - BVCB Marketing and Visitor Servicing Plan 2010 – 2014

Belfast City Council Project Document for Belfast Visitor & Convention Bureau 2011 - 12

(Year to Date Progress – Updated 19th September 2011)

Activity and Key Output Indicators

Establishment

Target	YTD Output
Develop a business plan for the company and the operation of the BWC, BIA TIC and GBBCA TIC on an annual basis.	Completed.
Assist with Board membership.	All new Board members are required to undergo an induction on appointment to the Board. Formal Board training for all Board members is scheduled to take place on Wednesday 28th September 2011. The course content includes roles and responsibilities of the Board, Board Members, the Chairman and the Chief Executive; managing key relationships; standards in public life including conflicts of interest; gifts and hospitality; procurement; accountability and VFM.
Hold regular Board meetings, currently 6 per annum.	Ongoing. 6 Board meetings to be held in 2011/2012 **2011** Thursday 7th April Tuesday 24th May (Special Finance meeting) Thursday 23rd June (Board and AGM) Thursday 18th August Wednesday 31st August (Special Board meeting) Thursday 20th October Thursday 8th December **2012** Thursday 9th February
Hold an Annual General Meeting each year.	Completed. AGM took place on 23rd June 2011 at the Lyric Theatre. Approx 120 members, stakeholders and special guests attended.

<table>
<tr><th>Target</th><th>YTD Output</th></tr>
<tr><td>Source funding as required to deliver the business plan</td><td>
BVCB Total Company Targets 2011/2012
<table>
<tr><th></th><th>Project document £</th><th>Current projected £</th><th>% projected to achieve</th></tr>
<tr><td>BCC</td><td>£1,865,465</td><td>£1,865,465</td><td>101%</td></tr>
<tr><td>NITB</td><td>£600,000</td><td>£417,873</td><td>70%</td></tr>
<tr><td>Other local authorities</td><td>£100,000</td><td>£65,000</td><td>65%</td></tr>
<tr><td>Private Sector membership</td><td>£160,000</td><td>£160,000</td><td>100%</td></tr>
<tr><td>Sponsorship</td><td>£100,000</td><td>£100,000</td><td>100%</td></tr>
<tr><td>Other commercial income</td><td>£768,160</td><td>£781,550</td><td>102%</td></tr>
<tr><td></td><td></td><td></td><td></td></tr>
<tr><td>Total</td><td>£3,593,625</td><td>£3,414,688</td><td>95%</td></tr>
</table>
</td></tr>
<tr><td>Ensure appropriate corporate governance is implemented (including all actions identified in the BCC Audit 2010/11).</td><td>The Final Follow-Up Audit Report issued by BCC AGRS in December 2010 concluded that the overall level of assurance given by BVCB's systems of internal control had improved from Amber to Green. This report included an action plan, agreed with BVCB Senior Management, to address a small number of outstanding issues.

These have all since been acted upon. Ongoing AGRS annual reviews of BVCB systems will take place and the first of these has been scheduled for September 2011.</td></tr>
<tr><td>Regular liaison with Belfast City Council's Tourism, Culture & Arts Manager.</td><td>BVCB/BCC monitoring meetings for 2011/12 are scheduled for the following dates:

Quarter 1: Tuesday 13th September 2011
Quarter 1: Thursday 27th October 2011
Quarter 1: Thursday 26th January 2012
Quarter 1: Thursday 26th April 2012</td></tr>
<tr><td>Quarterly reports to the Council's Development Committee detailing management accounts, activities undertaken and progression of impact indicators.</td><td>Dates to be confirmed by BCC.</td></tr>
<tr><td>To work in close partnership with relevant agencies and organisations which include Belfast City Council, the Northern</td><td>Ongoing:

BCC/NITB:
Daily contact with BCC & NITB.

NITB SLA monitoring meetings:</td></tr>
</table>

Target	YTD Output
Ireland Tourist Board and members of the Bureau.	Quarter 1: Monday 26th September 2011 Quarter 2: TBC Quarter 3: TBC Quarter 4: TBC **BCC monitoring meetings:** Quarter 1: Tuesday 13th September 2011 Quarter 2: Thursday 27th October 2011 Quarter 3: Thursday 26th January 2012 Quarter 4: Thursday 26th April 2012 **Board meetings:** Representatives from BCC & NITB are invited to attend Board and Sub Committee meetings on the following dates: 7th April 2011; 24th May 2011 (Special Finance meeting); June 2011 (Board and AGM); Thursday 18th August 2011; 20th October 2011; 8th December 2011 and 9th February 2012 **Audit, Finance & HR and Marketing Sub Committee Meetings:** 19th May 2011; 8th September 2011; 10th November 2011; 19th January 2012; 15th March 2012. **Regional Tourism Partners:** 2 Forums are held per year with enhanced attendance and engagement. The Officer's Group meets regularly to discuss and agree the plan to enhance the Forum agendas and to discuss future marketing initiatives e.g. greater Belfast visitor pass, voucher booklets and greater Belfast visitor map. **Private Sector/Trade:** BVCB regularly engage with private sector members and trade sector throughout the year. **Corporate events already taken place:** • Member Clinics, Holiday Inn, (10th May 2011) • AGM, Lyric Theatre (23rd June 2011) **Corporate events still to take place:** • Members Evening (October / November 2011) • Christmas Members evening, BWC • Sector meetings in Marchx2 In addition product update e-zines are sent to over 2,500 travel trade contacts on a monthly basis.
Provide quarterly management accounts to Belfast City Council.	Ongoing. Management accounts provided to BCC Tourism Unit observers on monthly basis as part of Board & sub committee papers. Most recently distributed at August 2011 Board Meeting. Additional copy being sent each month to David Orr, BCC Business Support Manager.
Provide yearly financial accounts to Belfast City	Forwarded to David Orr, BCC Business Support Manager.

Target	YTD Output
Council.	
Use and participate in the Tourism Monitor Research commissioned by Belfast City Council.	Ongoing. Recommend a meeting between KS/JE and GL/AM/RD/MJ/FU. BVCB requires: **Volume and Value data** on a timely basis relating to both overnight and day trips, by market segment (city breaks / business and conference / VFR) and by county of origin (would also suggest demographic info such as age / ABCD). **Campaign evaluation:** NI / ROI campaigns Carrier campaigns Also research regarding visitor patterns / visitor activity and visitor satisfaction.
The activity and forward business plans for Belfast Visitor and Convention Bureau will utilise the Tourism Monitor Data as benchmarking criteria to assist in forecasting future growth.	Ongoing. BVCB would require the most up-to-date data in order to use the most relevant figures for forward planning. Will this be delivered through BTM and MBU or through NISRA (currently no regional data available)?
Monitor Belfast's performance as a short break and business tourism destination against other comparative cities e.g. via European Cities Marketing.	Belfast has jumped 24 places in the ICCA worldwide rankings - It has moved up from number 183 in 2009 to 159 in 2010. In the European rankings it has jumped from number 96 to 84. The Belfast Visitor Pass went live on The European City Card website www.europeancitycards.com on 7th July making Belfast the only city in Northern Ireland to have a City Card, 2nd City in the UK to London and 2nd in Ireland to Dublin. Belfast was recently named the best-value UK city for tourists by a new cost-comparison index from TripAdvisor. BVCB will review how ECM can be used to help benchmark.

Leisure Tourism Marketing

Target	YTD Output
Develop and implement a leisure tourism marketing plan, in consultation with Belfast City Council and the Northern Ireland Tourist Board and the private sector members of BVCB, identifying key messages, products and platforms.	Belfast City Region Marketing & Visitor Servicing Plan 2011 – 2014, Incorporating Belfast Visitor & Convention Bureau's Operational and Business Plan: distributed & presented to BCC Development Committee Feb 2011; presented to BVCB membership March 2011.
Liaise with Tourism Ireland offices to ensure Belfast's key messages and products are utilised in their marketing and promotions.	Ongoing. Shared Themes document for 11/12 and met with TI London and Coleraine offices at the end of August. Communications team in regular communication with TI offices, relating to press fams but also receive product updates and publications.
Undertake targeted advertising campaigns and promotional activity in NI, GB and ROI with carriers and other partners promoting agreed city themes and other partners and products as appropriate.	**Summer Campaign 2011** The **Summer…Only in Belfast** Campaign went live on Monday 18th July for a 6 week period, up to 21st August. This tactical campaign included a range of media platforms including radio, outdoor and digital advertisements in NI and ROI, as well as radio and press promotions and a promotional leaflet (35,000 copies) distributed in key outlets in NI and ROI. The creative concepts focused on 3 key campaign taglines (**for label lovers and savvy shoppers; for Titanic Days out; for culture vultures and music lovers)** encouraging the target audience to shop, explore and make a night of it in Belfast, and in doing so, draws on the wealth of Belfast's key product offering and the value they offer including hotels, retail, events, festivals, restaurants, attractions, culture and tours. The above the line advertising was supported by integrated PR, campaign specific section on gotobelfast.com, social media and e-communication (See attached screen grabs for examples). 1000 members from across BVCB and Belfast Chamber of Trade and Commerce's membership were contacted in the process of putting the campaign together and were invited to participate. The following members took part: **Shopping** – Victoria Square, Castlecourt. **Festivals and Events** – Belfast Pride, Féile an Phobail, Cologne Philharmonic Orchestra, Belfast Taste and Music Fest, Belfast City Blues,

<table>
<tr><th>Target</th><th>YTD Output</th></tr>
<tr><td></td><td>
Belfast Mela, The One & Only Belfast Music tour, Belfast Bred.

Hotel Offers – Holiday Inn, Park Inn, Jurys Inn, Ramada Encore City Centre, Park Avenue Hotel, Malone Lodge Hotel & Apartments, Ramada Plaza, Ten Square Hotel, Europa Hotel, Hilton Hotel Belfast.

Meal Deals – Apartment, Horatio Todd's, The King's Head, Ryan's Bar & Restaurant, Madison's Hotel, McHughs, The Northern Whig, McCracken's, Basement Bar & Grill, Queen's Café Bar, Jurys Inn, Malone Lodge Hotel.

Car Park Offers – Castlecourt, McCausland Car Park, Days hotel Car Park, Hilton Car Park.

Income targets - outlined in business plan.

Evaluation of campaign - Campaign now finished and Post Campaign Media evaluation of outputs underway

Split between NI and ROI - All Ireland Campaign treated as one. Summer campaign 50:50 split.

2011 NI/ROI campaigns received the following funding:
DSD/BCTC: £90k
UBBF@Q: £50k
The Lyric: £20k

Update on carrier activity discussions with Tourism Ireland:
Proposals submitted and discussions are underway between TI, easyJet, flyBE, bmi, Jet 2, Aerlingus and Stena in respect of a series of co-operative joint funded campaigns in GB. To date one campaign confirmed.
</td></tr>
<tr><td>Secure private sector partnership funding to deliver marketing activity</td><td>
Membership base contribute to marketing activities through membership fees; advertising in main guide, about belfast guide and through partnership campaigns. Also buy in to marketing activity such as exhibitions / sales events.

2011-12 Projected % achievement
Updated to 31 July 2011. Source of Finance (Bureau funding only)

<table>
<tr><th></th><th>Project document £</th><th>Current projected £</th><th>% projected to achieve</th></tr>
<tr><td>Private Sector membership</td><td>£160,000</td><td>£160,000</td><td>100%</td></tr>
<tr><td>Sponsorship</td><td>£100,000</td><td>£100,000</td><td>100%</td></tr>
<tr><td>Other commercial income</td><td>£430,250</td><td>£475,120</td><td>110%</td></tr>
</table>

See management accounts attached.
</td></tr>
<tr><td>Develop, distribute</td><td>Whatabout / About Belfast Guide – 6 editions to be produced in</td></tr>
</table>

Target	YTD Output
and monitor marketing collateral, online and in print format including the Belfast Visitor Guide, 6 editions of the WhatAbout Guide, Belfast City Map and gotobelfast app.	2011/2012. ABC approved circulation 58,587. **Issues already produced:** May/June 2011 July/August 2011 September/October 2011 – this issue sees the launch of the newly design 'About Belfast' Guide. PR around the new launch is planned. **Remaining issues to be produced:** November/December 2011 January/February 2012 March/April 2012 **Belfast Visitor Guide** – 35,000 copies produced & distributed in Nov/Dec 2010. Over 12,000 copies have been distributed through Tourism Ireland network. Remaining copies will be used to service consumer enquiries and at exhibitions. **Belfast City Map** – 85,000 copies still in stock (last print run May '09). **Belfast App –** Since the gotobelfast app went live mid December 2010, there have been a total of 4,700 downloads. The most popular sections on the app are Timefillers, iCard and Great Belfast Food. There have been over 70,000 pageviews and over 10,000 unique visitors, with the average time on app at 15mins 05secs.
To support the council's projects to promote independent retail	Proposals submitted to BCC relating Lisburn Road / East Belfast – meetings yet to be organised. Joint campaigns agreed with BCTC/BCCM as per section above relating to campaign activity – Summer and Christmas (retail focus). LRBA invited to attend ROI media event in Dublin – 25 press attended.
Facilitation of inbound travel trade familiarisation visitors in partnership with Belfast City Council and other agencies where appropriate. Develop a database of all travel trade who have taken an interest in Belfast and ensure regular communications on new developments.	Product update e-zines sent to over 2,500 travel trade contacts on a monthly basis. Summer Summit – 7th – 9th July, BVCB hosted a civic reception at City Hall and Diageo sponsored an event at McHughs for 100 GB and ROI travel trade. NITB have ceased funding this activity and are handling travel trade fam trips internally.
As required, facilitation of outward trade and sales missions in partnership with	Skal World Congress, Turku, Finland. Provided Titanic literature and gifts from Belfast Welcome Centre to Diane Toner and Bridgene McKeever representing Skal Northern Ireland who were presenting to the Congress on Northern Ireland.

Target	YTD Output
Belfast City Council and other agencies where appropriate.	Michael Graham, Titanic Quarter Ltd, was provided with Only in Belfast video to be used at business presentation in Paris.
As required, facilitate advertising and promotion of events in conjunction with Belfast City Council.	Ongoing. All BCC events promoted on BVCB platforms. As required, facilitate advertising and promotion of events in conjunction with Belfast City Council. Ongoing – all BCC events [promoted on BVCB marketing platforms (print and online): • St Patrick's Day • Belfast Marathon • Lord Mayors Parade • Autumn Fair • Halloween • Christmas Light Switch on (and Continental Markets) • Also BCC supported events such as, Belsonic, Culture Night etc Liaise with BCC's City Events team and Tourism, Culture and Arts team to maximise PR and marketing opportunities linked to city events and large scale festivals. • City events uploaded on gotobelfast.com • Whatabout Guide (now About Belfast) lists events on a bi-monthly basis (60,000 printed each edition) – BCC events and Tourism personnel invited to editorial meetings and where appropriate editorial on addition to listings for key events provided. • Product update ezine distributed to over 9000 press – updating travel trade, travel media and partners on new developments, accolades and up and coming events. • Events such as the above listed plus profile and promotion of BCC linked tourism initiatives: Belfast Music, Literary Belfast, Belfast Bred, Walking Tours and CS Lewis Tours. • MTV European music Awards – facilitating and supporting the vent through information provision to MTV Personnel; provision of editorial space in About Belfast guide and on the gotobelfast.com website.
Develop the potential of Belfast as a cruise destination in partnership with the Port of Belfast.	32 cruise calls to city scheduled in 2011. These were secured in 2009. 40 cruise calls are scheduled for 2012. New marketing and sales campaign targeting 10 news calls, 50 cruise calls for 2014.
Ongoing development, marketing and monitoring of www.gotobelfast.com ensuring relevant, consumer focused	**Qtr 1 & 2 Visits to date:** Apr 11 – 58,164 May 11 – 56,517 June 11 – 55,937 July 11 – 59,158 Aug 11 – 69,696

Target	YTD Output
and timely content.	Total Visits for Qtr 1 & 2 to date – 299,472 Mthly average for Qtr 1 – 59,894 **Qtr 1 & 2 visits per day to date:** Apr 11 – 1,939 May 11 – 1,823 June 11 – 1,865 July 11 – 1,908 Aug 11 – 2,248 Average visits per day Qtr 1 & 2 to date – 1,957 **Qtr 1 & 2 Bounce Rates to date:** Apr 11 – 35.36% May 11 – 33.79% June 11 – 33.18% July 11 – 33.21% Aug 11 – 35.52% Average bounce rate Qtr 1 & 2 to date – 34.2% Current site is being re-developed to ensure it is fully abreast of modern technology and communication and to link with mobile and app technology. Expected project completion in early 2012.

Business Tourism

<table>
<tr><th>Target</th><th>YTD Output</th></tr>
<tr><td>Develop and implement a business tourism marketing plan, in consultation with Belfast City Council and the Northern Ireland Tourist Board and the private sector members of BVCB, identifying key messages, products and platforms.</td><td>Target and Year to Date Performance for Conference Bureau:
<table>
<tr><th>Target</th><th>Current</th><th>%</th></tr>
<tr><td>Delegates (26,000)</td><td>7,960</td><td>31%</td></tr>
<tr><td>Bed Nights (78,000)</td><td>19,690</td><td>25%</td></tr>
<tr><td>Revenue (£25.8m)</td><td>£8,727,775</td><td>34%</td></tr>
<tr><td>Sales Calls (90)</td><td>14</td><td>15%</td></tr>
<tr><td>Exhibitions/Events (4)</td><td>1</td><td>25%</td></tr>
<tr><td>Site Inspections (30)</td><td>19</td><td>63%</td></tr>
<tr><td>Fam trips (2/30 people)</td><td>1/10</td><td>50%</td></tr>
<tr><td>Conference Enquiries (120)</td><td>52</td><td>43%</td></tr>
<tr><td>Leads – Exhibitions/Calls</td><td></td><td></td></tr>
<tr><td colspan="3">Ambassador Programme / Research</td></tr>
<tr><td>New Ambassadors (90)</td><td>44</td><td>48%</td></tr>
<tr><td>Targeted Leads (140)</td><td>66</td><td>47%</td></tr>
<tr><td colspan="3">Accommodation Bookings</td></tr>
<tr><td>11/12 Target (£20,000)</td><td>£7,958.12</td><td>40%</td></tr>
<tr><td>30 Conference Additions</td><td>6</td><td>20%</td></tr>
</table>
</td></tr>
<tr><td>Develop and manage Chaser conference enquiry system</td><td>Ongoing – Chaser will be moving to an online system in the next 6 months. Velvet Solutions, the company that manage the system are rolling the new system out at the moment.

Year to date, 54 new enquiries has been added to the system. Chaser has the facility to generate a number of different reports – these can be supplied to BCC on request.</td></tr>
<tr><td>Develop and manage the Conference Ambassador Programme.</td><td>44 new Ambassadors year to date or 48% of target
Target for 2011/12 is 90 new ambassadors</td></tr>
<tr><td>Develop and manage the Belfast and Northern</td><td>[1] Note that Belfast and NI Conference Subvention Scheme as separate agreement and project document.</td></tr>
</table>

Target	YTD Output
Ireland Conference Subvention Scheme1	
Manage the Online Accommodation Booking System	A target of £20,000 has been set for commission income from conference related accommodation bookings in 2011/12. Commission year to date is £7,958.12 or 40% of the annual target.
Research and develop potential conferences to target, linking where appropriate to the economic sectors identified by Belfast City Council for growth of the city.	Ongoing Research is ongoing and we have a targeted of 140 leads, and year to date we have achieved 67 new leads for potential conferences to come to Belfast which is 47% of our target. We target potential conferences for Belfast that have a local member based in Belfast. 70% of the conferences that come to Belfast have come through the ambassador programme. The majority of ambassadors come from the QUB, UU and the hospital trusts.
Measure, monitor and report all Convention Bureau activities to Belfast City Council.	Ongoing
Develop marketing activity that prioritises conference market penetration through those regions that have direct access to Belfast – local NI market, ROI, GB, North America and Europe.	Ongoing The Annual Association event took place onboard HMS Belfast, London on 7th September 2011. 50 Association clients representing 31 Associations attended the event. 10 local trade partners joined us for the evening. Minister Arlene Foster, MLA was the special guest and gave a speech. Belfast City Councillors Christopher Stalford and Councillor Conor Maskey were invited but were unable to attend. We are also planning smaller scale events in Glasgow & Manchester targeting the conference market. Other marketing activity includes site inspections, sales calls, fam trips, primary & secondary marketing at conferences.
Manage inward familiarisation visits in partnership with Belfast City Council and other agencies where appropriate.	The Belfast Convention Bureau is organizing a FAM trip at the end of September in association with Tourism Ireland. We are aiming to attract 10 Association buyers to make the trip to Belfast to enjoy 2 days of experiencing the Belfast conference & meetings product.
Attendance and organisation of trade exhibitions and events to promote Belfast.	IMEX Frankfurt – May 2011 – attended this event on the Tourism Ireland stand IMEX America – October 2011 – BVCB will be attending this event on the TI stand C & IT Association Forum – November 2011 – BVCB will be attending with Belfast Waterfront.

Target	YTD Output
	EIBTM, Barcelona – December 2011 – BVCB will be attending Confex International – March 2012 – BVCB will be attending with own Belfast stand in the UK Destinations area
Production of a bi-annual Meetings & Conference Guide, Conference Ambassador literature and Accommodation Booking literature.	Belfast Conference & Meetings Guide [to be printed early 2012] Hard copy & digital version for website. Ambassador brochures [no reprint required]. Accommodation booking literature [none required]. 10 Year Calendar produced [2,000 copies].
Communicate conference dates and opportunities to the hospitality sector.	Conference dates and opportunities are communicated by email to all members when opportunities arise. The Hospitality sector is also update on upcoming activity through attendance at meetings of the NIHF Belfast Hoteliers Group. Dates of upcoming conferences are listed on the new City-wide Online Calendar which can be accessed via www.gotobelfast.com in the member's section using log in details (username: bvcb password: bvcbmember). Details are also circulated within the Corporate e-zine which is distributed to members on a monthly basis.
Establish a Business Tourism Taskforce.	Senior team attends the Belfast Tourism Forum meetings and Tourism Forum Working Officers Group meetings. Conference Bureau attended the NITB Business Tourism Product Development Group meetings on 13 April and 10 August 2011. The next meeting will take place on 12th October 2011.

Communications

Target	YTD Output
Develop and implement a communications plan, in consultation with Belfast City Council, ensuring the integration of BVCB's communications plans with overall marketing plans for the city and regularly liaising with Belfast City Council Corporate Communications.	Ongoing.
Ensure that the marketing, communications and visitor servicing plans are driven by the city's brand and focus on the core brand values and attributes.	**Summer Campaign 2011** Advertising and Design Agencies both fully briefed on Belfast Brand (have also been involved in its development) – all creatives and marketing activity takes the essence of the Belfast brand (inc B)
Liaise with Belfast City Council's City Events team and Tourism, Culture and Arts team to maximise PR and marketing opportunities linked to city events and large scale festivals.	City events uploaded on gotobelfast.com; whatabout guide (now about Belfast) lists events on a bi-monthly basis (60,000 printed each edition). Product e-zine distributed to over 900 press. Full list of events to follow.
Develop and implement effective communication strategies that maximise awareness of Belfast in NI, ROI and GB.	Ongoing consumer and corporate PR in all main markets with issue of press releases and photos. Facilitating spokespersons from BVCB on a wide range of economic and tourism issues to all media. Evaluation ongoing: 138 - Articles & Broadcast Pieces since April 2011 125,188,544 WOTS £2,526,256.85 AD EQ
Reinforce BVCB's role as the lead agency for the marketing and promotion of Belfast, ensuring Belfast City Council is recognised as the main funder.	All press release material states BVCB is the organization responsible for marketing Belfast as a leisure and business tourism destination as well as including a statement that BVCB is a public-private partnership with funding from BCC. All marketing material includes BCC corporate logo.
Increase Belfast's image and position in all main markets as an exciting, vibrant, contemporary	Ongoing work with journalists and publications, utilising promotions and competitions and features to captivate interest and attention in Belfast as a top European City.

<table>
<tr><th>Target</th><th>YTD Output</th></tr>
<tr><td>and value for money must see European destination of distinction by profile and awareness building activities to promote Belfast as a short break destination for day and overnight trips, focusing on agreed city themes and products as appropriate.</td><td>Media coverage equates to £2.5 million ad equivalent and 125.2 million WOTS. The figures supplied relate to YTD from April 2011.

Press trips under discussion with NITB given loss of funding – target 100 36 fams hosted YTD (116 press/media welcomed).

Coverage collated on receipt – market breakdown can be supplied next Qtr.</td></tr>
<tr><td>Ensure that our communications and marketing plans incorporate and utilise new technologies and innovative destination marketing techniques.</td><td>Continued use of Social Media – "gotobelfast" Facebook & Twitter profiles have a combined fan/follower count of over 4,250 people, providing our audience with daily posts on events, ticketing and offers which encourages interaction and spend in the city.

Official GoToBelfast App - The 3rd phase of the App went live in mid April 2011. It incorporates the Great Belfast Food feature, including a restaurant finder (profiling over 130 member restaurants, hotels and gastropubs), recipe search, food stories and video clips.

Since the gotobelfast app went live mid December 2010, there have been a total of X downloads. The most popular sections on the app are Timefillers, iCard and Great Belfast Food.

There have been over 70,000 pageviews and over 10,000 unique visitors, with the average time on app at 15mins 05secs.

Plans are currently underway to develop the App further to Phase 4. Further details to follow.

Further updates to the app are currently taking place including recipricol links to the Belfast Music App and Belfast Literary App.

Utilisation of digital advertising channels as part of all campaign advertising plans.

iTours – Total page views on itours website until June 2011 are 203,330 with 11,078 unique visitors. In addition

The top 10 videos viewed on the You Tube channel are:

<table>
<tr><th>TOURS</th><th></th></tr>
<tr><td>Belfast iTours Intro</td><td>1338</td></tr>
<tr><td>St Georges Market</td><td>1072</td></tr>
<tr><td>City Hall</td><td>715</td></tr>
<tr><td>Friars Bush</td><td>699</td></tr>
<tr><td>Shankill Graveyard</td><td>629</td></tr>
<tr><td>Queens University</td><td>516</td></tr>
<tr><td>Dundonald Ice Bowl</td><td>432</td></tr>
<tr><td>Lady Dixon Park</td><td>413</td></tr>
<tr><td>Clifton St Cemetery</td><td>404</td></tr>
<tr><td>Cave Hill</td><td>355</td></tr>
</table>
</td></tr>
</table>

Target	YTD Output
	Report for downloads generated on a quarterly basis, the most recent report shows statistics up until end of June 2011. This shows that there had been 966 downloads of the full zip tour packages with the Belfast City Centre Tour proving most popular with 341 downloads. Each video clip can also be downloaded individually and up to June 2011 there had been a total of 3671 individual clip downloads with Belfast City Hall being most popular with 217 downloads. The table below shows where the main body of users viewing Belfastitours.com page are viewing from in terms of Geographic location. As of the end of June 2011 the primary traffic source seems to be coming from the USA with over 176,637 page views being generated by this audience, 16,188 page views are being driven by Great British users and 1,652 are being driven by users from Germany.

2010:

Country	Sep '10	Oct '10	Nov '10	Dec '10
USA	2,683	19,078	14,029	11,341
Great Britain	1,544	951	839	1,175
Germany	8	22	19	82
Ireland	42	77	66	30
EU	33	85	58	20
Japan	42	32	56	12
Spain	2	16	36	8
Canada	10	10	13	16
Australia	0	0	0	0
Czech Republic	0	0	0	0
Italy	0	0	0	0
South Korea	0	0	0	0
France	0	0	0	0
Switzerland	0	0	0	0

2011

Country	Jan '11	Feb '11	Mar '11	Apr '11	May '11	June '11	10/11 Total
USA	5,156	6,077	4,452	64,545	44,163	4,847	**176,371**
Great Britain	853	1,223	527	1,641	6,147	1,288	**16,188**
Germany	319	144	174	220	148	516	**1,652**
Ireland	40	68	34	160	817	227	**1,561**
EU	19	13	24	32	187	40	**511**
Japan	16	14	54	26	71	16	**339**
Spain	7	12	11	18	32	53	**195**
Canada	18	24	15	33	59	47	**245**
Australia	0	0	0	286	242	257	**785**
Czech Republic	0	0	0	225	216	176	**617**
Italy	0	0	0	14	135	13	**162**
South Korea	0	0	0	0	47	0	**47**
France	0	0	0	23	27	4	**54**
Switzerland	0	0	0	13	15	0	**28**

Belfast Visitor Pass

Total sales, (including 3 TIC's & Translink outlets) up to 4th September 2011 = 783 cards – this has generated £7,004 income.

Target	YTD Output
	At the time of the launch there were 86 offers however several companies have joined since taking the number of offers to 91. We have a few large group enquiries pending for 2012 in relation to purchasing the Visitor Pass in bulk for tour groups – we are still looking at how best to move forward with these in the next stage. The Belfast Visitor Pass went live on The European City Card website www.europeancitycards.com on 7th July making Belfast the only city in Northern Ireland to have a City Card, 2nd City in the UK to London and 2nd in Ireland to Dublin. Lots of PR & Marketing to date – see attached for details. The next stage is to commission a business case for Phase 2, go out to tender for a service provider and secure support funding with a view to having Phase 2 in place by early 2012.
Organise and host a series of media events and briefings in Belfast and main GB and ROI markets to maximise reputation and image of Belfast, its activities and products.	Ongoing On 8^{th} June NITB Co hosted ROI press event in Dublin to highlight Belfast Finest including Victoria Square, Lisburn Road, Bespoke Belfast, Titanic Tours and Down Royal.
Support the generation and servicing of individual and group media familiarisation visits to Belfast and NI from ROI, GB, Europe, North America and the rest of the world.	Since April 2011: 37 fams hosted YTD (117 press/media welcomed) Majority are general travel media though a mix between general destination experience; Belfast as part of a NI trip; a small minority would be specialist: gardens; music for exampled. BVCB worked with TI/NITB to bring in 45 for Titanic 100 event in May: UK – 30 RoI – 2 Europe – 56 N. America – 15 RoW - 12 Coverage received at various times – some media quick turn around others a much longer lead in time (esp. N. America) – coverage sought through media directly or TI offices. Eve also has google alerts in order to capture on-line coverage Discussion to take place with NITB around new arrangements for media fams.
Develop a database of all media who have taken an interest in/visited Belfast and ensure regular communications	Ongoing by Agency and Comms team: Over 900 press contacts on Office Bliss database – they receive the monthly product up-date ezine. TI publicity contacts also on the distribution list for the product update to translate into appropriate

Target	YTD Output
on new developments.	language.
Communicate and manage relationships with funders, sponsors, members and strategic partners through promotion, organisation and attendance of business and marketing events, member networking events, awards and sector briefings as well as regular updates and e-marketing activities.	Ongoing: **Corporate events already taken place:** • Member Clinics, Holiday Inn, (10th May 2011) • AGM, Lyric Theatre (23rd June 2011) **Corporate events still to take place:** • Members Evening (October / November 2011) • Christmas Members evening, BWC • Sector meetings in Marchx2
Communicate specific messages through the above platforms on Titanic Belfast and Titanic 2012.	Draft Industry engagement plan has been submitted to Lisa McCartney to co-ordinate NITB and BCC activities.

Visitor Servicing

Target	YTD Output
Implement the three business plans for the Belfast Welcome Centre and the Tic's at Belfast International Airport and George Best Belfast City Airport, ensuring that the aims, objectives and targets as described in the business plans are achieved so far as reasonably possible in all circumstances.	**BWC Targets (up to July 2011)** • Visitor Numbers 86,702 YTD against Target 265,566 (35%) • Total Enquires 119,912 YTD against Target 348,636 (35%) • Gross Income £314,619 against Target £972,501 (32%) **BIA Targets** • Visitor Numbers 19,042 YTD against Target 53,418 (37%) • Total Enquires 28,621 YTD against Target 77,832 (37%) • Gross Income £54,654 against Target £140,650 (39%) **GBBCA Targets** • Visitor Numbers 14,757 YTD against Target 34,464 (43%) • Total Enquires 24,725 YTD against Target 69,039 (36%) • Gross Income £17,883 against Target £76,300 (23%)
Take all reasonable endeavours to ensure that all health and safety requirements in relation to the management and use of the premises are duly observed.	The Health & Safety Committee meets 4 times a year. Next meeting due to take place in October 2011. A fire risk assessment was conducted by Aviva on 29th March 2011. A full report with recommendations has been received and is being implemented.
Maintain high standards of customer service throughout the three Tic's	Ongoing. NITB have just commenced new mystery shop surveys in September 2011 of all TICs. The results will be fed back next review period. Millward Brown Ulster research for 2010 indicates: Satisfied/Very satisfied with BWC – 93% Satisfied/Very satisfied with BWC welcome – 86%*lower than before but more people self servicing. Satisfied/Very satisfied with BWC information – 89% Satisfied/Very satisfied with BWC souvenirs – 82%
Facilitate the ticketing and promotion of product initiatives (such as C.S Lewis, Late Night Art etc).	Ongoing. BWC involved with ticketing and promotion of BCC tour products. To date this financial year have booked the following number of tours: Historic Walks – 270 Late Night Art – 187 CS Lewis Tours – 93 Music Tours – 143 Belfast Bred Tours – 289 Belfast Historic Pub Walking Tour - 107

Provide a box office service for events and festivals in the city.	BWC currently provides box office facilities for a total of 96 festivals, events and tours.
Supply literature for Belfast City Council events.	As required.
Regularly update literature stocks in the local information point in the City Hall.	As required, bi-monthly Whatabout/Maps and regular drop off of any new relevant literature.
Co-ordinate quarterly meetings with local information points across the city to ensure consistency of visitor servicing.	Not as yet, met informally with Culturlann and Spectrum Centre in August.
Deliver weekly updates and regular familiarisation trips for front of office staff across the city on new product developments, including specific sessions on Titanic Belfast and Titanic 2012.	21 specific staff product updates since April 2011. 8 Specific product Fam trips involving 21 staff since April 2011. See attached for details.
Benchmark Belfast Welcome Centre performance against other tourist information offices of similar size.	This is done on an annual basis with UK TIC managers. Meet 3 times per annum and baseline survey produced on annual basis.
Support Belfast City Council where appropriate on the relocation to ground floor premises.	Ongoing.

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Belfast City Region

Marketing & Visitor Servicing Plan 2011 – 2014

Incorporating Belfast Visitor & Convention Bureau's Operational and Business Plan

Draft report

4 February 2011

Contents

Executive summary I

Introduction

1.1 Belfast and Northern Ireland have experienced significant benefit from the development of tourism over the past 15 years. Public and private sector investment has led to substantial improvement in tourism infrastructure and this in turn has helped attract increased numbers of visitors. Belfast, being the capital city, main economic centre and key point of entry, has witnessed a high level of that new investment and has benefitted accordingly. As the capital city, Belfast has been the hub and driver behind the growth in tourism to Northern Ireland as a whole.

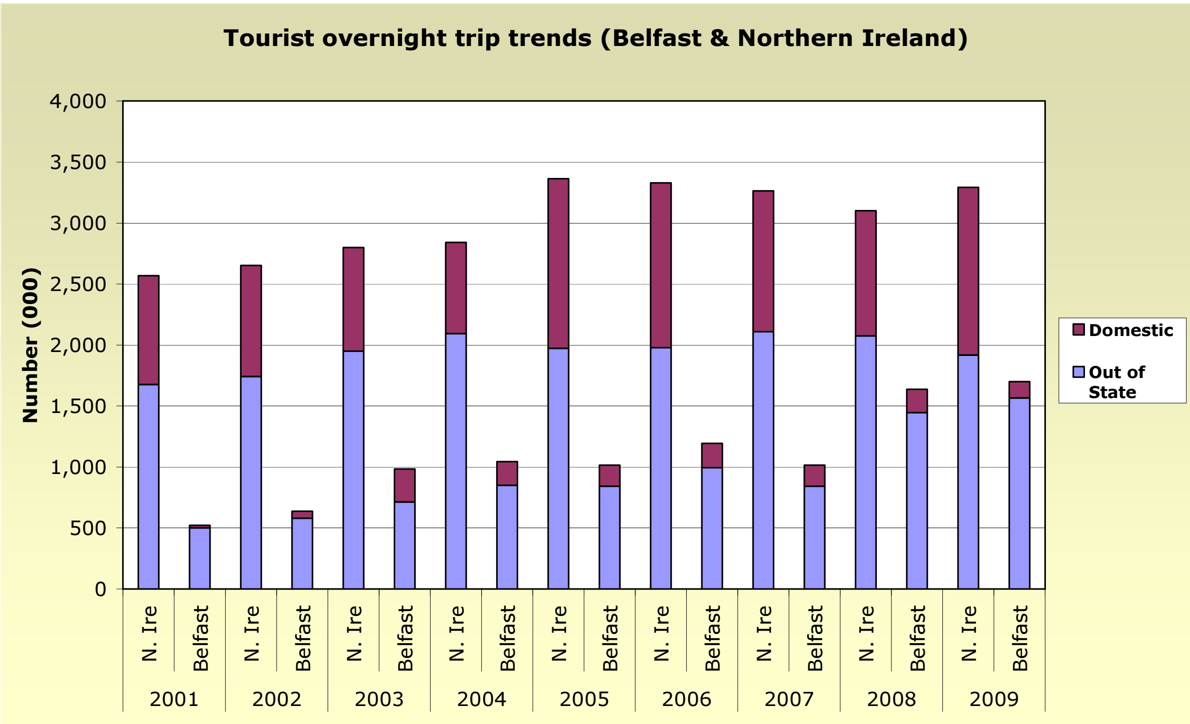
1.2 In addition to having the facilities and attractions that visitors expect, any destination must also have effective promotion and marketing. In the Belfast region, this has largely been the responsibility of the Belfast Visitor and Convention Bureau ("BVCB") which has made an important contribution to the tourism boost that the City has experienced.

1.3 Despite recent success, Northern Ireland continues to lag some way behind its near neighbours. The years 2012 and 2013 are generally accepted as being pivotal for tourism at a local level. The major new investments, and key celebrations, planned for these years will provide the opportunity to lift tourism onto a new and higher level. The Belfast City region will be a key player during this timeframe and BVCB will have an important role to play in ensuring the region's success.

1.4 To fully exploit this potential, all of the bodies involved in tourism development and marketing must work together with clearly defined and agreed priorities. In an environment where budgets are under pressure, any potential duplication of effort must be avoided. BVCB's focus over the coming 3 year period will be on driving overnight stays from the closer to home and direct access leisure markets and the discretionary business tourism market.

BVCB: success to date

1.5 Formed in 1999 the BVCB can, in tandem with other key stakeholders, claim credit for substantially increasing visitor and tourist numbers to the City region. The following graph charts the growth of overnight tourist trips to the City region and to Northern Ireland:



Source: BCC Tourism Monitor & NITB Tourism Facts

1.6 Between 2001 and 2009, the total number of overnight trips to the City region trebled. In 2009, total overnight trips to the region increased by approximately 4% (8% for out of state trips) compared to 2008 and by an estimated 68% (86% for out of state trips) when compared to 2005. By comparison, the number of out of state overnight trips to the island of Ireland reduced by 6% in 2009 compared to 2005. However, success in generating tourist trips does not necessarily translate into a corresponding and equivalent increase in overnight stays:

1.7 The volume of overnight stays in the Belfast region reduced in 2009, despite the increase in visitor trips. The total estimated overnight stays in the City region in 2009 was 3.77 million as against and estimate of 4.67 million in 2008.

1.8 The total estimated number of hotel bedrooms sold in 2009 increased by 15% year on year, which is contrary to the reduction in overnight stays in the region. However, demand at hotels from the business tourism market (both independent business users and conference related traffic) has reduced over the past number of years, although the increase in leisure related traffic has gone some way to mitigate this loss. It would appear that this trend has continued into 2010. In a difficult economic climate, it is crucial that increased numbers of overnight tourists that deliver increased overnight stays be attracted to the City region.

City marketing

1.9 City destination marketing is a relatively new discipline which has emerged as a consequence of the disappearance of national boundaries in the global economy. This places greater emphasis on the requirement for cities to define their competitive advantage over other places as locations to invest in, re-locate to or to visit as tourists. Developing the narrative that articulates the distinctiveness and uniqueness of a city is a critical component of competitive place marketing today.

1.10 The Belfast City region is in exactly this position. Like many other cities, Belfast has been challenged with re-inventing itself in the post industrial era. But it has had to do this following many years of being perceived as a 'war zone'. While tremendous progress has been made, there are major challenges for the future, not least the expanding capacity for tourism set against declining budgets for destination marketing.

1.11 Urban tourism is geared towards 2 primary markets, these being:

a) **City breaks**: driven by events, the arts, cultural industries, sports, retailing etc. that have led to City Breaks becoming the fastest growing sector of leisure tourism in the past decade; and

b) **Discretionary business tourism**: otherwise known as Meetings, Incentive Travel, Conferences and Exhibitions ("MICE"), and which is concentrated largely in urban destinations as they have the range of facilities and attributes to satisfy the most demanding delegates.

1.12 These are the priority markets in which Belfast must compete effectively.

Roles

1.13 The role of a city marketing agency is to contribute to improving the quality of life for all the citizens of the city by generating wealth and creating jobs. BVCB must demonstrate that it creates customers for the city and must focus on partnerships to maximise the utilisation of the expanded tourism infrastructure.

1.14 Tourism Ireland Limited ("TIL") is the all-Ireland destination marketing organisation (or "DMO") with the responsibility for promoting all of the island of Ireland overseas (including Great Britain) while the Northern Ireland Tourist Board has responsibility for promoting Northern Ireland within the island of Ireland and for providing strategic direction to the industry.

1.15 The BVCB is a public-private partnership organisation responsible for the promotion of the Greater Belfast Region to a global audience and it is also a visitor servicing organisation. Despite its remit, BVCB does not have the resources to assume a global marketing capability. Therefore it must have a more targeted, focused approach clearly defining which markets and products offer the best potential return and which it can effectively market to. In other markets, it will tap into the marketing activities of Tourism Ireland Limited ("TIL") and the Northern Ireland Tourist Board ("NITB") and ensure that the Belfast narrative is correctly and appropriately communicated in those markets.

Consultation

1.16 Consultation with key stakeholders revealed that there is both recognition of BVCB's achievements over the past decade and substantial goodwill towards working more cohesively with it. Indeed, stakeholders feel that there is an opportunity for closer engagement with BVCB, working together to plan initiatives in predefined target markets. There is also a recognition that BVCB has had to spread its resources too thinly, and now needs to focus on the markets that offer easier wins (i.e. closer to home and direct access markets).

Research and market information

1.17 As noted, a DMO should be focussed on driving overnight visitors to the destination. Since it neither owns nor controls any significant assets, its value is in the information that it holds. Therefore, it must be sufficiently well engaged with, and knowledgeable about, the destination's assets (or the 'product supply chain'[1]).

1.18 A core question for BVCB is: ***"what information does the industry owe us and what information do we owe the industry?"*** At a very basic level, BVCB needs to have access to reliable data on the performance of the destination across a range of key performance indicators (such as gaps in demand, number of tourists, overnights stays, meeting room/bedroom occupancy rates, enquiry conversion rates, confirmed conferences, projected bookings and occupancy rates). That knowledge will be valuable in developing effective strategies to improve performance.

External environment

1.19 City marketing in general faces a number of challenges quite distinct from the current economic environment. In particular, the marketplace in which visitor and conference bureaux operate is evolving, with many new players competing for space and offering similar services. There is also the challenge brought about by the migration of information to the internet and through new media. This demands that DMO's be represented on the information pathways that potential customers use as they make their decisions.

1.20 BVCB needs to review and to enhance its current web-presence, use of new marketing technologies and IT systems. This is a constant challenge and one which requires financial resource. A comprehensive review of its IT systems is required.

The Belfast Brand

1.21 The Belfast brand was developed to accurately reflect the uniqueness of the City. That is, the City has become a beacon for positive change and is alive with fresh opportunities for citizens, visitors and investors.

[1] *See Appendix A*

1.22 It is difficult at this time to judge the impact of the new 'Belfast Inspired' brand. There has been no tracking studies nor any focus group research on the brand's reach or penetration. Anecdotal evidence suggests that it is considered more a Belfast City Council logo rather than a City brand.

1.23 If the brand does not differentiate Belfast from its competitors it will fail. It is essential to know where the brand sits in this regard. In moving this matter forward, BVCB should work with all Belfast stakeholders to determine the next steps in the development of the brand strategy (including articulation of the Brand narrative). This can only be undertaken once a custodian for the Brand has been nominated and focus groups in key target markets have been organised to determine responses to the Belfast brand.

Growth strategies and opportunities

1.24 A number of strategies and plans have been developed for the Belfast City region and for Northern Ireland with the singular objective of driving tourism forward in the medium to long term. Of particular relevance are the Integrated Strategic Framework for Belfast Tourism ("ISFBT"), the Tourism Strategy for Northern Ireland ("TSNI") and the draft Northern Ireland 2012 Business Case ("NI 2012").

1.25 The ISFBT provides the framework for Belfast's tourism sector (public, private and voluntary) to deliver the Belfast brand experience and position the City within the top twenty city destinations in Europe. The key market opportunities outlined in the ISFBT are consistent with those identified during the stakeholder consultation exercise (that is, Great Britain, Republic of Ireland, Northern Ireland, direct access European markets and other overseas longer stay markets that may include Belfast as part of a trip to the island).

1.26 The TSNI identifies short term market segments as city breaks (especially those that are event led), culture/experience seekers, activity and special interest breaks and business visitors (national associations, corporate meetings/conferences, incentive travel and trade/consumer exhibitions). Many of these opportunities are in line with the markets that are typically drawn to urban destinations. Over the term of the TSNI (to the year 2020), the objective is to double revenue from tourism and to increase visitor numbers by 41%.

1.27 The years 2012 and 2013 are seen as the "tipping point" for tourism in Northern Ireland. Against this background, NITB and BCC appointed independent experts to develop the NI 2012 business case for a successful and high profile series of events in 2012 that can yield a step change in perceptions about the province. Central to this programme are events that will mark the Centenary of the completion of RMS Titanic.

1.28 The proposed budget for NI 2012 has yet to be agreed as have the mechanisms for delivering, managing and marketing the planned events. Given the role of BVCB and the Tourist Information Centres it manages, it should be at the forefront of assisting all stakeholders in exploiting the opportunities the forthcoming period presents, although additional budgets will be required.

Marketing Priorities for Belfast City Region

1.29 As outlined above, the key market opportunities for the City region are City breaks and Discretionary Business Tourism. Therefore BVCB needs to concentrate its marketing effort to drive up the number of overnight stays by ensuring that the region:

a) becomes a major European City Break destination; and

b) the leading convention destination in Ireland, particularly in light of the development of the Convention Centre, Dublin.

1.30 While daytrips are not considered a priority market for DMOs, they have been an important source of visitors and a driver of economic benefit to the city as a whole. In the short term, marketing activity should be maintained with the caveat that it must include an overnight message.

1.31 Close strategic and working partnerships with NITB, TIL and other global brand organisations based in Northern Ireland will be essential.

City breaks

1.32 The fastest growing sector of leisure tourism over recent years is the city break. To meet this demand the traditional tour operator/travel agency responded with the introduction of 'packaged' city breaks. BVCB is faced with the very distinct challenge of focusing its leisure tourism efforts on this market with the specific objective of generating bed nights that will result in increased occupancy for the accommodation sector and increased spend in the City region. Given the scarcity of resources, BVCB will be driven by the principle:

Any proposed activity should be assessed on its ability to generate bed nights and increase occupancy. If it fails to satisfy these criteria it should be abandoned.

1.33 In addition to improved exposure in media such as city break operator web-sites (see paras 5.10 – 5.12), the organisation must work through other communications and sales channels to ensure that Belfast's "share of voice" is heard within the key target markets of Great Britain, the Republic of Ireland and in Europe (through TIL). The key source markets will be those cities or regions within Great Britain with direct air access to, or which are close to major ports serving, Belfast and those European cities with which we have direct air links. In the Republic of Ireland, the key market will be the greater Dublin Metropolitan area and major regional centres with easy access to the motorway network, plus those using Ireland as a gateway to the entire island. A detailed assessment of the key market opportunities and the products to be used in attracting them is included at ***Section VIII***.

1.34 Membership of key trade bodies such as European Cities Marketing ("ECM") and its City Pass programme can provide opportunities to benchmark performance, gain access to prospect databases and ensure that the industry can engage directly with the customer (i.e. with City Pass holders).

1.35 Promotion in the City Break market will also recognise that:

a) there is an opportunity to create a greater awareness of the quality of the Belfast experience through targeted public relations activity (e.g. in - flight guides) where there is direct air access;

b) the key "drivers" for choosing a city break are entertainment, arts and culture and historic sites. They help to challenge negative perceptions of the destination as they illustrate the existence of an enhanced quality of life within the region. By engaging closely with the sector, BVCB can help to develop the "compelling narrative" to leverage the positive brand value that can result. To assist in this process it is recommended that BCC commission a Cultural Mapping study (see para 5.13c);

c) BVCB should attend the European Tour Operators Association ("ETOA")/ECM 'City Fair' event, which is dedicated to the lucrative and growing sector of city tourism; and

d) every opportunity should be sought to maximise Belfast's 'share of voice' within the key target markets of Great Britain and the Republic of Ireland through a targeted public relations strategy and in Europe through TIL, which should be provided with appropriate narrative for each market.

Business tourism

1.36 Developing discretionary business tourism in Northern Ireland is undertaken separately by BVCB (associations) and NITB (corporate and incentive markets) although a close working relationship exists between the organisations.

Executive summary I

1.37 A Convention Bureau's focus should be on attracting events that utilise more than one hotel or, what is sometimes referred to as, requiring citywide services. Although Belfast was successful in attracting the discretionary business tourism market for a number of years (2006 – 2008), the past two years have been disappointing in this regard. Some progress has been made in 2010 in converting prospects into secure bookings, but there is an over-reliance on smaller scale events as demonstrated below:

Delegate numbers	Conference wins
Conferences attracting over 500 delegates	5
Conferences attracting between 300-500 delegates	15
Conferences attracting between 100-300 delegates	27
Conferences attracting fewer than 100 delegates	33
Source: BVCB	

1.38 BVCB reported 152 enquiries for the period April 2010 to November 2010 of which only 13 were for greater than 500 delegates and 104 were for fewer than 200 delegates (and which can typically be located in a single venue). Looking forward, BVCB's convention bureau activities must be more focussed on addressing:

a) increased hotel capacity;

b) declining bedroom occupancy rates; and

c) reducing room yields.

1.39 Securing larger scale conference events will be a priority which will require close engagement with the industry. BVCB must take the lead in stimulating ideas within the supply chain to develop "saleable" propositions. Belfast has a range of high quality venues or assets that can be utilised more effectively in promoting the City region as a high quality, competitive and alternate conference destination and thereby maximising the utilisation of the City's capacity.

1.40 As part of this process, BVCB must keep its stakeholders fully informed of its performance, the challenges it faces in selling to the marketplace and the reasons why any opportunities are lost. Additionally, it must also assess the performance of those stakeholders and its impact on them. There are sufficient examples of basic reporting methods of key performance measures for discretionary business tourism within international membership organisations such as European Cities Marketing ("ECM") and Destination Marketing Association International. BVCB will adopt these KPI's (set out in ***Appendix B***) and reporting methods to provide an accurate assessment of the organisation's performance.

1.41 BVCB's membership of organisations such as the International Congress & Convention Association ("ICCA"), ECM, the Association of British Professional Conference Organisers ("ABPCO") or joining Destination Marketing Association International ("DMAI") and other database sources (such as Meeting Professionals International and Professional Convention Management Association) can be employed to gain access to conferences of the type and scale that match Belfast's expanded product profile.

1.42 In its forward marketing plan BVCB will:

a) concentrate on attracting larger scale conferences that will help utilise Belfast's increased capacity;

b) establish credible and reliable reporting of the performance of Belfast as a City Break and Convention destination, and on BVCB's performance to its stakeholders (see paras 5.29 & 5.30);

c) when pursuing the City Break and Convention market sectors, focus on increasing occupancy and yield of the accommodation supply sector. The natural "knock on" effects will be spending at the attractions and events, in hospitality businesses and in the retail sector, greatly improving the net value added to the economy of Belfast and Northern Ireland overall;

d) organise "flying squad" meetings with stakeholders to identify opportunities and monitor performance (see para 5.33e);

e) make a number of minor changes to the structure of its marketing department to better align it with the key business tourism segments (see para 9.26); and

f) develop a business culture that seeks to answer three questions:

i) how many tourists?;

ii) how long are they staying?; and

iii) how much are they spending?

1.43 In short, if any activity does not contribute to increased levels of performance in any one of these areas, then it should be abandoned.

1.44 BVCB's future activities and operations will be guided by the following foundations:

a) **engagement** – BVCB will work closely with its stakeholders and partners to shape and develop products, services and propositions for our key markets (including co-ordinating a city-wide marketing plan), to leverage marketing opportunities and to understand and monitor performance levels in the region;

b) **articulation –** BVCB does not have the resources to compete in every market that it may wish to. It will articulate the messages to those with the budgets (primarily TIL and to a lesser extent NITB) that can take the lead in marketing Belfast in overseas markets; and

c) **focus –** emphasis will be on attracting overnight visitors to the City region from those markets that offer the best prospects.

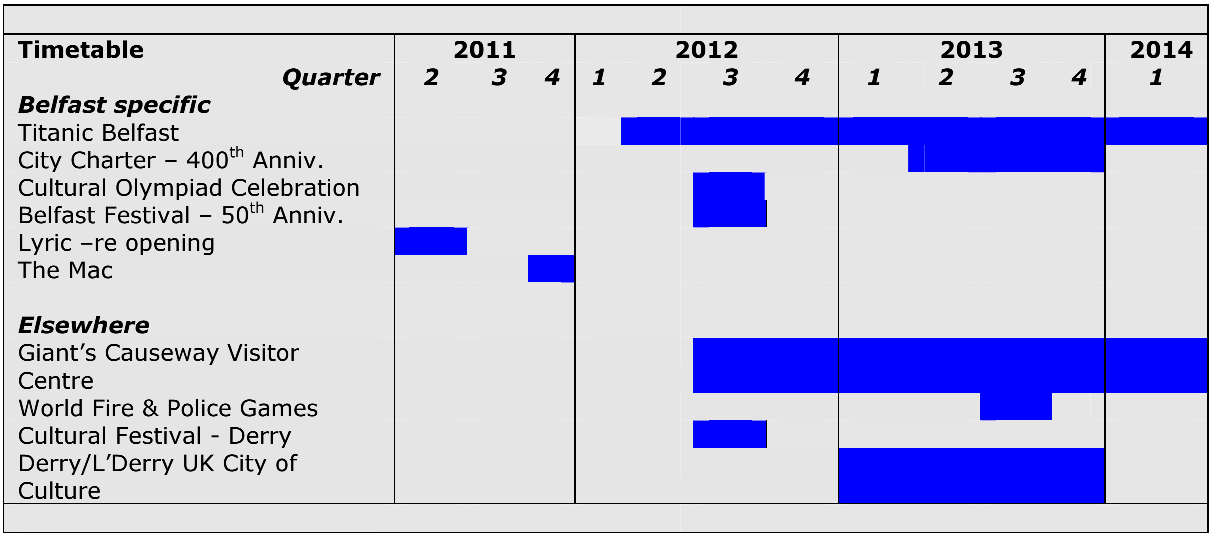
Targets

1.45 Using the most recent Millward Brown Ulster Tourism Monitor results (for 2009) as a baseline (for 2010) for setting future targets, and recognising the importance of at least recording average annual increases in line with the ISFBT and TSNI, the following targets have been set:

City Growth targets:	**2010 est.**	**2011 est.**	**2012 est.**	**2013 est.**	**Avg. Annual**
Overnight stays	**`000**	**`000**	**`000**	**`000**	**increase**
Domestic	432	441	450	459	2.0%
Great Britain	1,549	1,610	1,675	1,742	4.0%
Rep of Ireland	1,346	1,414	1,484	1,559	5.0%
Europe	147	153	159	166	4.0%
North America	311	323	336	349	4.0%
Other	113	115	117	120	2.0%
Total	**3,898**	**4,056**	**4,222**	**4,394**	**3.9%**
Total OoS	**3,466**	**3,616**	**3,772**	**3,935**	**4.3%**
Day trippers					
Domestic	5,830	6.000	6,305	6,620	4.3%
Scotland	22	24	27	28	8.5%
England & Wales	31	32	36	37	6.5%
Rep of Ireland	1,654	1,654	1,736	1,824	3.3%
Europe	5	5	6	6	6.9%
North America	7	7	8	8	5.7%
Other	2	2	2	2	5.7%
Total	**7,551**	**7,730**	**8,120**	**8,526**	**4.4%**
Total OoS	**1,721**	**1,725**	**1,814**	**1,905**	**3.9%**

Executive summary **I**

1.46 As regards overnight stays, the total average per annum increase over the period is 3.9% which is in excess of the best estimate increases set out in the ISFBT (see para 7.18) and in the TSNI (see para 7.19). This is considered to be achievable given the key developments and events that will take place in and around the City region in the short term:



1.47 The increase in day visitors is expected to accelerate rapidly in 2012 on account of the events linked to the Titanic Centenary celebrations, with a 10% increase from most geographic markets during the year, but reducing thereafter to 5% growth annually. These are ambitious growth targets, but realistic in the circumstances. **Either Belfast will take a step change in 2012 or it will not happen at all.**

1.48 So far as discretionary business tourism related bookings are concerned, the prospects in this segment remain challenging due to the economic climate and increased levels of competition.

1.49 Subject to no staff changes within the BVCB conference team and taking account of increased utilisation of the Ambassador programme, full and collaborative engagement between all partners in the supply chain, BVCB's participation in a broader spectrum of trade bodies, and the commitment by BCC and NITB to a Conference Subvention Programme, the following targets have been set:

New bookings secured	**2010 baseline**	**Target 2011/12**	**Target 2012/13**	**Target 2013/14**
Estimated Delegate numbers	18,000	26,000	34,000	38,000
Estimated Bed nights	55,000	78,000	102,000	114,000
Estimated Value	£17.9m	£25.8m	£33.8M	£37.7m
% of available annual room nights *	4.1%	5.8%	7.7%	8.6%
** based on hotel bedroom supply at 31 Dec 2010.*				

1.50 To help with the process of supply chain engagement and collaboration, a **Discretionary Business Tourism Taskforce** should be established. Its purpose is to review conference enquiries, progress, actions by members to help turn live enquiries into confirmed bookings, and to critically assess, learn from and agree corrective measures in response to failed bids. This process will improve the region's prospects "next time around". The taskforce should meet on a quarterly basis (or as soon as an opportunity arises that requires a quick response) and include representatives from BVCB, NITB, BCC, key venues, the Belfast Hoteliers Group and carriers.

Budgets and funding - BVCB

1.51 In preparing the operational cost estimates we have had to make a number of broad assumptions (detailed in paras 9.28 – 9.30). Primarily these are driven out of current uncertainties regarding departmental budgets.

1.52 In essence, we are working on the basis that the core budget available to BVCB is unlikely to increase in any significant way over the next 3 years. In order to direct spending on those key markets identified in ***Section VIII***, certain historical activities have been pared back (see para 9.32). The objective is to improve the value for money proposition by generating more high value business for the region, but utilising the same level of resources.

1.53 A detailed, costed, marketing operational plan for 2011/12 is included at ***Appendix E***. It includes associated performance targets, timing of activities and expected trade income. The total estimated budget is summarised as follows:

BVCB Budget 2011/12	BCC	NITB	Private sector	Local Authority	Total
	£	£	£	£	£
Total City Break Campaigns	**313,417**	**100,000**	**376,001**	**10,832**	**800,250**
Total Leisure Marketing	**146,668**	**69,300**	**131,185**	**46,497**	**393,650**
Total Web and Digital	**47,834**	**15,500**	**21,660**	**20,006**	**105,000**
Total Conference Bureau	**11,130**	**98,000**	**44,004**	**1,666**	**154,800**
Total Communications	**55,844**	**25,700**	**89,956**	**0**	**171,500**
Staff costs	693,584	62,000	27,444	4,333	787,361
Overheads	144,523			16,666	161,189
Total costs funded by:	**1,413,000**	**370,500**	**690,250**	**100,000**	**2.573,750**
	54.9%	**14.4%**	**26.8%**	**3.9%**	**100%**

1.54 This table sets out the balance of funding across the major stakeholder groups. Public sector support allows BVCB to leverage additional private sector funding in the form of sponsorship, advertising and participation in trade related events amounting to approximately £690k per annum. Any reduction in funding from BCC or NITB will have a "knock on" effect on private sector support and will substantially diminish BVCB's ability to market the region and the City's capability to meet its objectives.

Executive summary I

1.55 The following table provides a summary of the key target outcomes arising from the proposed marketing operations:

Leisure Marketing	Conference Bureau	Communications
50,000 website visits/mnth	Secure 28,000 delegates	Host 120 press trips
Present to 30 agents/operators in direct access mkts	Secure 78,000 bed nights	secure £3.5m advertising equivalent
20 tour leads (Germany)	£25.8m of conference trade	120m weighted opps to see
20 leads from WTM	Recruit 70 new ambassadors	Secure PR coverage for 230 articles
Secure 31 cruise ships	Secure interest of 60 buyers	Produce & distribute 12 issues of the Corporate (product) e-zine
Organise 20 fam trips/300 trade visitors	40 new leads in Europe, 40 in UK, 10 in USA	Produce & distribute 12 issues of the Consumer (product) e-zine
Secure additional 158,000 bed nights (v 2009)	Host FAM trip	Issue a minimum of 36 (Corporate and Product) press releases
Secure additional 179,000 day trippers (v 2009)	Submit 120 bids/60% conversion rate	Attract 5,000 followers through social media outlets

1.56 Detailed income and expenditure budgets for the period 2011/12 to 2013/14 are included at ***Appendix F*** and summarised as follows:

Year	2011/12	2012/13	2013/14	Total
Income	**£'000**	**£'000**	**£'000**	**£'000**
Belfast City Council	1,413	1,413	1,413	4,239
NITB	371	371	370	1,111
Other local authorities	100	100	100	300
Private sector income	690	763	653	2,106
Total	**2,574**	**2,647**	**2,536**	**7,756**
Non overhead expenses				
Support for GBBCA TIC	5	5	5	15
Marketing/communications	1,620	1,677	1,530	4,827
Total	**1,625**	**1,682**	**1,535**	**4,842**
Overheads				
Salaries	787	796	825	2,408
Other overheads	153	160	167	480
Depreciation	8	8	9	25
Total	**948**	**964**	**1,001**	**2,913**
Surplus/(deficit) for the period	**1**	**1**	**0**	**2**
Salaries as a % of income	30.6%	30.0%	32.5%	31.0%
Total overhead as a % of income	36.8%	36.4%	39.5%	37.6%
Marketing/Comms as a % of income	62.9%	63.4%	60.3%	62.2%

1.57 In overall terms, the BVCB is expected to break–even or record a small surplus in each year. This means that the organisation has no capacity to cover unexpected expenses without drawing budget away from marketing activities. Ideally, it should be in a position to build up a modest level of reserves to provide some cover for such eventualities.

1.58 The years 2012 and 2013 offer a major opportunity for Northern Ireland. A comprehensive programme of events is being planned, underpinned by celebration of the Titanic Centenary, but budgets and their application have yet to be finalised. Given the Northern Ireland wide benefits expected to arise from 2012 it has been suggested that marketing be undertaken by TIL and NITB. While this is logical, there will also be an important role for BVCB in promoting the Centenary in conjunction with its City Break and visitor servicing activities in much the same way as the 2009 Tall Ships event. Although the marketing and visitor servicing activities planned by BVCB for the years 2011/12 and 2012/13 make provision for the Titanic Centenary and the City of Belfast's 400th Anniversary of its Charter, any substantial uplift in such activity will require additional budgetary resource, for which separate marketing and visitor service plans should be developed.

Budget and funding - Visitor servicing

1.59 Visitor servicing falls under the remit of each local authority area. Since April 2000 BVCB has managed the Belfast City Region's visitor servicing on behalf of BCC. In addition BVCB also delivers essential gateway services through the TICs for NITB and for the rest of Northern Ireland.

1.60 The quality of visitor servicing through BVCB's 3 information centres is highly regarded. As a measure of the importance of the Belfast Welcome Centre, it handled 40.2% of all Northern Ireland tourism enquiries in 2008. The emphasis of activity over the coming 3 year period will be on:

a) improving product knowledge about the City Region and Northern Ireland more generally amongst front-line staff (including knowledge about Derry/Londonderry UK City of Culture 2013 since the Belfast airports are likely to be the key gateways for overseas visitors);

b) encouraging repeat visits and increased spend;

c) identifying and developing IT related customer servicing opportunities (i.e. podcasts, apps, mobile maps, virtual 3D tours);

d) steering visitors towards Belfast's cultural and heritage products or "trails"; and

e) ensuring that the Belfast story, when developed, and the messages for Titanic 2012 and the 400th Anniversary of Belfast in 2013 are well known and articulated in the TICs.

1.61 Detailed income and expenditure budgets for the period 2011/12 to 2013/14 are included at ***Appendix F*** and summarised as follows:

Visitor Servicing budgeted income and expenditure	2011/12	2012/13	2013/14	Total
Belfast Welcome Centre	**£'000**	**£'000**	**£'000**	**£'000**
Income				
Belfast City Council	479	479	479	**1,437**
NITB	162	162	162	**486**
Commercial activity	973	1,030	1,075	**3,078**
Total	**1,614**	**1,671**	**1,716**	**5,001**
Total Costs	**1,613**	**1,671**	**1,716**	**5,000**
Surplus/(deficit) for the period	1	0	0	1
Belfast International Airport				
Income				
Belfast City Council	19	19	19	**57**
NITB	47	47	47	**141**
Commercial activity	141	150	158	**449**
BVCB	13	13	13	**39**
Total	**220**	**229**	**237**	**686**
Total Costs	**220**	**229**	**237**	**686**
Surplus/(deficit) for the period	0	0	0	0
George Best Belfast City Airport				
Income				
Belfast City Council	31	31	31	**93**
NITB	21	21	21	**63**
Commercial activity	76	82	88	**246**
RTPs	5	5	5	**15**
BVCB	5	5	5	**15**
Total	**138**	**144**	**150**	**432**
Total Costs	**138**	**143**	**149**	**430**
Surplus/(deficit) for the period	0	1	1	2
Total cost (3 TICs)	**1,971**	**2,043**	**2,102**	**6,116**

1.62 The key points from the above analysis are:

a) the level of retail activity that is required to cover the cost of operating each TIC;

b) in the case of the gateway airport TIC's the level of income and retailing at each is insufficient to cover the operating costs. Consequently, BVCB is required to redirect funding from its activities to meet the shortfall; and

c) any reduction in income from any source, or any unexpected increase in operating costs, will add pressure to BVCB to meet the "funding" gap.

Executive summary I

1.63 The total commitment by stakeholders to all of the activities of BVCB over the 3 year period, is summarised as follows:

Funding sources	2011/12		2012/13		2013/14		
	Mktg	**VS**	**Mktg**	**VS**	**Mktg**	**VS**	**Total**
	£'000	**£'000**	**£'000**	**£'000**	**£'000**	**£'000**	**£'000**
Belfast City Council	1,413	529	1,413	529	1,413	529	**5,826**
NITB	371	230	371	230	370	230	**1,801**
Commercial Activity	-	1,189	-	1,262	-	1,321	**3,772**
Local authorities	95	5	95	5	95	5	**300**
Private sector	690	-	763	-	653	-	**2,106**
Total	**2,569**	**1,953**	**2,642**	**2,026**	**2,531**	**2,085**	**13,806**
Annual total ('000)	**4,522**		**4,668**		**4,616**		
VS = Visitor Servicing							

Strategic/long term changes

1.64 Throughout this report, we have highlighted matters that are more strategic or longer term in nature and which will, in some shape or form, play a role in further improving the City region's prospects or performance monitoring. These include:

a) BCC should undertake a Cultural Mapping exercise (para 5.13c);

b) commission a comprehensive review of BVCB's ICT operations including web and mobile technologies (para 6.7 & 6.8); and

c) the review of delivery structures in the city including destination marketing and destination management (para 6.5 & 6.10g).

1.65 The cost of these reviews has not been included within the above budgets.

City marketing and the challenges it faces II

Introduction

2.1 City marketing is a relatively new discipline which has emerged as a consequence of the disappearance of national boundaries in the global economy. Within Europe, the collapse of communism opened up many 'new' destinations in the former USSR. When faced with the challenge of entering the Western economy, those nations chose tourism as the industry that would provide the fastest and easiest access to foreign capital. However, their positioning was based on cities rather than on countries. Hence, you are invited to visit Prague rather than the Czech Republic, Budapest rather than Hungary, St Petersburg rather than Russia etc.

2.2 The introduction of highly discounted air fares on short-haul routes (sometimes referred to, erroneously, as 'low-Cost-Airlines') has created a new market for cities at both ends of the route structures. Consequently, Prague is one of the top 'city break' destinations in Europe today.

Articulating the message

2.3 It is no surprise therefore, that in today's global economy the unit of analysis of economic performance is the city region. This places greater emphasis on the requirement for cities to define their competitive advantage over other places as locations to invest in, re-locate to or to visit as tourists. In other words, **developing the narrative that articulates the distinctiveness and uniqueness of your city is a critical component of competitive place marketing today**.

2.4 Belfast, like many other cities, has been challenged with re-inventing itself in the post industrial era. But it has had to do this following many years of being perceived as a 'war zone'. The establishment of Belfast Visitor and Convention Bureau ("BVCB") in 1999 represented a very positive opportunity to begin the process of returning Belfast to its citizens as a place to be proud of again and of promoting it as a great, historic city to an external audience. With the support of both the public and private sectors the results produced are evidence of its success to date.

2.5 While tremendous progress has been made, there are major challenges for the future, not least the expanding capacity for tourism set against declining budgets for destination marketing. Given the enormous changes that have taken place in Belfast in recent years, as evidenced by the massive investment in tourism infrastructure and public realm projects, it is necessary to re-align the marketing and information services of BVCB to ensure they are focused on taking full advantage of the opportunities presented over the next three years.

2.6 **The role of a city marketing agency is to assist in improving the quality of life for all the citizens of the city by generating wealth and creating jobs. BVCB must demonstrate that it creates customers for the city and focus on partnerships to maximise the utilisation of the expanded tourism infrastructure**.

The external environment

2.7 BVCB must address three emerging strategic themes if it is to become a more effective destination marketing organisation ("DMO") in the 21st century knowledge economy:

a) Relevance;

b) The Value Proposition; and

c) Visibility.

Relevance

2.8 To varying degrees, visitor and convention bureaux operate in an increasingly noisy, confusing, and evolving marketplace – one in which their role is less and less uniquely defined and less willingly acknowledged.

2.9 The increasing disintermediation of the visitor services marketplace, the rise of new business entities contending for the attention of visitors and meeting organisers, the wealth of free information made available online and increasing local competition for funds formerly earmarked for destination marketing, all conspire to challenge the traditional role of a DMO. Consequently BVCB will be under constant pressure to prove its 'value role' within the distribution chain.

2.10 As stakeholders contend with their own individual business pressures, their expectations of BVCB will increase proportionately.

The Value Proposition

2.11 Closely related to the theme of relevance, the value proposition issue embodies a long-term question of focus (i.e. – the configuration of services traditionally offered). This is the single essential contribution made by the BVCB in the perceptions of the many stakeholders with whom it interacts. Over the years, many new players in the marketplace for travel, tourism, meetings, and hospitality have been 'nibbling away' at the DMO "value package." The expansion of Belfast's infrastructure has introduced a new group of professionals who are going about their business, and who should have knowledge of, and contact with, BVCB.

Visibility

2.12 As the massive migration of "content" – information of every conceivable kind – to the Internet proceeds, visitors and those who market services to them have an abundance of sources for researching, planning, and organising travel-related activities. Sophisticated travellers increasingly go to online sources to plan their vacations. While they may be susceptible and responsive to print sources such as newspapers, magazines, and the publications of travel writers, the battle for customer attention will increasingly be fought on the Internet.

2.13 If one accepts the premise that the capacity to market anything depends on some kind of access to those who buy it – visibility – then Belfast needs to be in the information pathways that potential customers use as they make their decisions. BVCB's websites require the level of sophistication, user-friendly design, and inter-activeness needed to compete with other sources. City-operated websites, sites operated by city-specific newspapers and magazines, and sites of individual local attractions all compete with BVCB's site for visitor attention.

2.14 The "Mobile Internet" is fast becoming an essential resource where hand-held personal electronic devices with miniature screens enable the cyber-conscious customer to search a wealth of information from any location. BVCB and Belfast City need to position themselves in as many as possible of the critical information pathways available to the prospective visitor.

Future trends in destination marketing

2.15 Eight "Super-Trends" that will shape Belfast's strategy in the future are:

- **Customer Sector**: ***"Proliferating Preferences"*** Travel customers, both consumers and commercial demand aggregators, are seeking and responding to an ever growing range of choices in the travel products and experiences they buy. BVCB and its stakeholders will have to develop ever more targeted and responsive value packages to capture and retain business;

- **Competitor Sector**: ***"The Battle for Attention."*** Belfast will have to work even harder to be heard through the noise of an increasingly crowded and complex market place, particularly as the travel-buying experience continues its migration to the Internet;
- **Economic Sector**: ***"Dodging Asteroids."*** The city break and discretionary business tourism sectors are increasingly vulnerable to various economic "shocks" such as energy prices, exchange rates, political unrest, terrorism, and threats of cataclysmic effects such as health pandemics. Belfast has to plan for potential "economic asteroids" in its strategy (i.e. major events or changes that can suddenly reorder the competitive arena) and has to be able to respond and react to events as they arise;
- **Technological Sector: *"Smart and Friendly Websites."*** The website is now an absolute necessity for doing business in the travel sector, and website design is becoming ever more sophisticated. In knowledge-intensive business environments such as tourism, the most successful competitors tend to be those that continue to exploit the latest technologies and information strategies. BVCB, in representing the City region, must stay abreast of the many potential competitors that offer information and advice and it must ensure that its electronic communications are at the 'leading edge'. For instance, emerging technologies include on-line visa applications, virtual 3D tours and mobile maps;
- **Social Sector: *"The Electronic Society."*** Traditional localised, physically based human communities are increasingly being extended – and in some cases, replaced - by virtual, electronically mediated relationships. On-line social media and networking (*Facebook, Twitter et al*) and user-generated web content will be increasingly important as competitive strengths;
- **Political Sector: *"The Quest for Relevance."*** funding sources traditionally allocated for destination marketing are increasingly subject to claims by other groups (e.g. BCC Events, Arts and Cultural organisations);
- **Legal Sector: *"Mixed Signals From Government."*** The tourism industry is ever more strongly affected by the policies, practices, legislative agendas, and economic strategies of governments across the globe, many of which are contradictory or conflicting, and which sometimes pit regions, destinations, and interest groups against one another; and
- **Geophysical Sector (Place and Space):** *"Going Green."* As public consciousness and political activism make the issue of ecological sustainability ever more real, business entities of all kinds, including BVCB and the stakeholders they serve, will experience increasing pressure to be "seen as green." Belfast will find it necessary to develop realistic strategies and plans for sustainable development and management of the tourism product in the future.

2.16 To the above can be added the recent trend in the United Kingdom for local Destination Marketing Organisations ("DMO") and City Centre Management ("CCM") organisations to merge or partner. DMOs have historically marketed the destination to the external audience, whereas CCMs have largely been focussed on attractions (inc retail, business, arts etc) access (inc transport, parking), amenities (inc cleanliness, public realm) and action (inc marketing, strategies), the objective being that the destination is both desirable and attractive. Ultimately, BVCB relies on the industry at large to deliver on its marketing promise and opportunities for greater collaboration between all sectors needs to be addressed. The challenge is agreeing who does what? – the Belfast Integrated Strategic Tourism Framework sets out recommendations to deal with this matter.

2.17 The key drivers for such collaboration include the thinking that DMOs must have some ability to influence the quality of the product to ensure the destination's long term sustainability. Added to this are budgetary pressures and the need for revenue generation. While any such consideration is outside the scope of this assignment, this is a matter that may need to be visited in some detail within the next 4 years and in advance of the review of public administration proposals to substantially reduce the number of local council bodies.

2.18 The trends highlighted above demonstrate that the tourism marketplace is dynamic, is being influenced by an increasingly wide range of factors and that the activities of DMOs must be reviewed on a regular basis to ensure compliance with market changes. The Tourism Marketplace has changed dramatically in the ten years since BVCB was established. In this context, it is both appropriate and necessary that BVCB "step back" from its activities from time to time and critically assess how it is responding to and meeting new and emerging challenges.

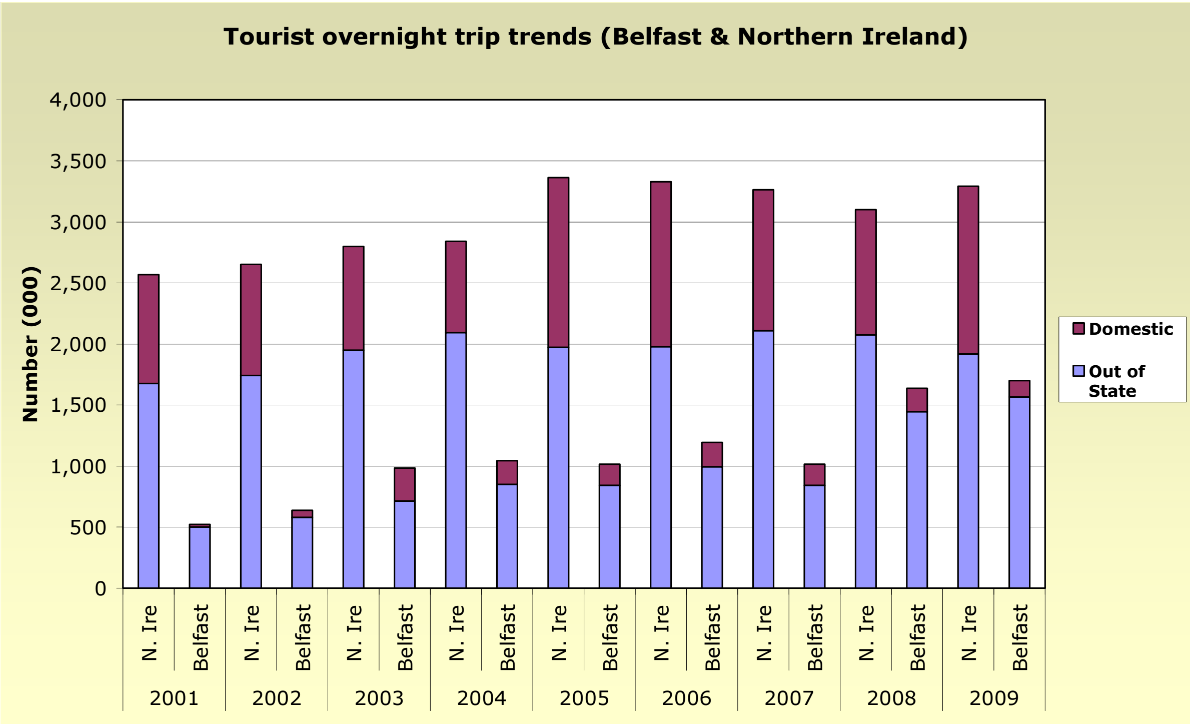
Introduction

3.1 There are a number of sources of information and statistics in relation to the performance of Belfast as a tourist and visitor destination including Northern Ireland Tourist Board statistics, the Belfast Tourism Monitor and private sector funded research.

3.2 Some of the stakeholders consulted as part of this assignment were uncertain about the consistency and reliability of the statistics currently being used, and felt a disconnect between some of the statistics and the 'on the ground' experience of the industry. However, NITB and BCC are working in partnership to deal with this issue.

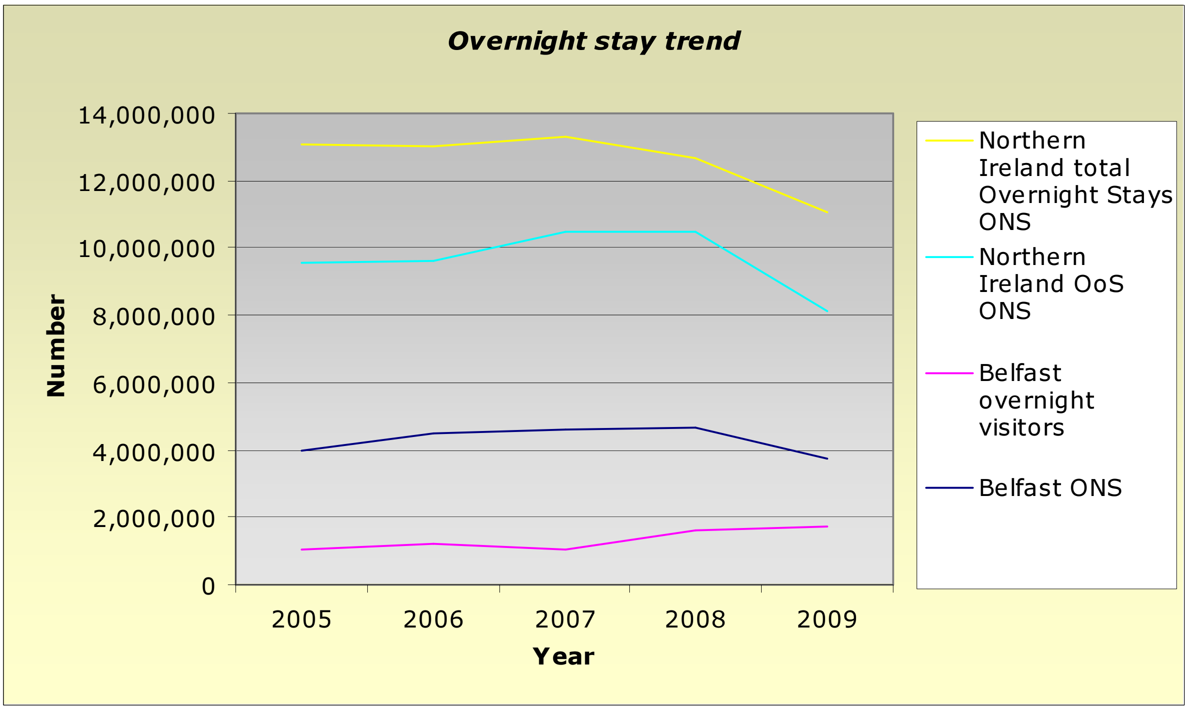
Performance measurement

3.3 Based on the Belfast City Council Tourism Monitor and NITB research, the success of Belfast in increasing the number of overnight visitors, relative to Northern Ireland, can be demonstrated as follows:



Source: BCC Tourism Monitor & NITB Tourism Facts

3.4 Between 2001 and 2009, the total number of overnight trips to the City region trebled. In 2009, total overnight trips to the region increased by approximately 4% (8% for out of state trips) compared to 2008 and by an estimated 68% (86% for out of state trips) when compared to 2005. By comparison, the number of out of state overnight trips to the island of Ireland reduced by 6% in 2009 compared to 2005. However, success in generating tourist trips does not necessarily translate into a corresponding and equivalent increase in overnight stays:



Source: NITB Tourism Facts and Local Authority Tourism Estimates and the BCC Tourism Monitor 2009

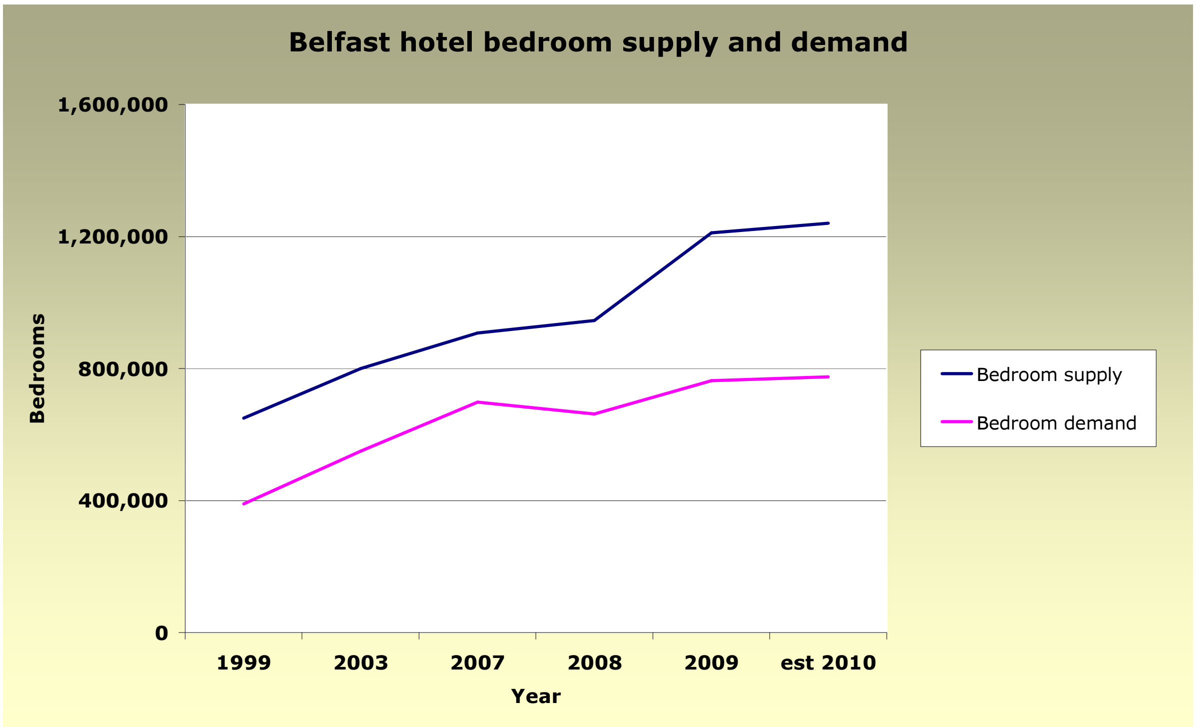
3.5 The volume of overnight stays in the Belfast region reduced in 2009, despite the increase in overnight trips. The total estimated overnight stays in the City region in 2009 was 3.77 million as against and estimate of 4.67 million in 2008. In addition, the City region welcomed approximately 7.6m day trip visitors in 2009 (*source: Millward Brown Ulster Belfast Tourism Monitor 2009*).

3.6 The number of overnight stays throughout Northern Ireland has been in decline since 2007. In the most recent year for which statistics are available (2009), total overnight stays reduced by approximately 13% compared with 2008, while the volume of Out of State (OoS) overnight stays reduced by approximately 22%.

3.7 Other performance highlights from the 2009 Tourism Monitor include:

Tourism Monitor Highlights 2009	versus '08/reason	**number/%**
Visitor trips	**+30%**	**9.25m**
Out of state o/night tourists	**+12%**	**1.57m**
Overnight tourists from Republic of Ireland	**+107%**	**0.88m**
Overnight tourists from Great Britain	**-27%**	**0.55m**
Out of state tourists – first time in Belfast	**-9%**	**58%**
Out of state day trippers – most popular mode of entry	**Via RoI**	**51%**
OoS – Overnight tourists – most popular mode of entry	**air**	**74%**
Continental Europeans arriving via Republic of Ireland		**26%**
OoS – Overnight tourists – main reason to visit	**City brk / h'day**	**60%**
OoS – Day trippers – main reason to visit	**attractions**	**46%**
OoS tourists – main information source pre-visit	**internet**	**68%**
OoS – Overnight tourists – booking commercial accomm	**internet**	**57%**
Overnight tourists – reason for visiting	**Curious/different**	**47%**
Source: BCC/BVCB		

3.8 Given the trend in overnight stays in the City one would expect the tourist accommodation providers to have reported similar experiences in 2009. However, this is not necessarily the case. The following table charts the level of hotel bedroom supply and demand over the past number of years:



Source: NITB (Supply) & ASM Hotel Industry Survey (Demand)

3.9 The estimated number of bedrooms sold in 2008 reduced in comparison to 2007, although there was a circa 15% increase in total estimated room sales in 2009. Due to an increase in bedroom supply during 2009 and into 2010, average bedroom occupancy rates have been in decline since 2008. New supply was planned on the expectation that demand in the City region would continue to increase at a rate that was largely consistent with previous years (and before the current economic "slump").

3.10 These results suggest some inconsistency between the published visitor performance statistics recorded in the Tourism Monitor and the Local Authority Tourism Estimates and the experience of the industry "on the ground". Assessing the nature of demand at hotels does not address this issue, but it does reveal some interesting points:

Hotel overnight guests - Belfast	**2007**	**2009**
Corporate users	49.1%	33.9%
Conference/meeting delegates	7.3%	6.5%
Independent tourists	29.8%	46.9%
Tour groups	10.1%	5.1%
Air crew	2.3%	3.6%
Other	1.4%	4.0%
Total	**100.0%**	**100.0%**
Source: ASM Hotel Industry Survey		

Research and monitoring III

3.11 Comparing 2009 with 2007, the number of business related overnight guests has reduced while the volume of leisure traffic has increased (an important market but which tends to be more price sensitive). The net result is that bedroom yields have declined. Of the total bedroom sales at hotels in 2007 and 2009, approximately 7.3% and 6.5% respectively were accounted for by conference and meeting delegates – a market that can be influenced by the activities of BVCB. However, the corporate market cannot be influenced in any way by the actions of the DMO, so any increase or decline in demand from this user group arises for other reasons.

Addressing the disconnect

3.12 A core question for BVCB is: ***"what information does the industry owe us and what information do we owe the industry?"*** Without access to reliable market information, and proper management of the 'product supply chain'[2] the destination marketing organisation is subject to the criticism.

3.13 In turn, this raises questions about the efficiency of the city-wide systems and processes currently used for data gathering, management and dissemination of information related to the performance of the city destination and therefore the operational performance of BVCB.

Monitoring requirements

3.14 Based on the above assessment, BVCB will:

a) implement a broader range of key performance indicators and measures (as identified at paras 5.29 and 5.30);

b) with Belfast City Council ("BCC") and the Northern Ireland Tourist Board ("NITB") agree a uniform method of statistical analysis and reporting and how this will be resourced; and

c) through its membership of the ECM (European Cities Marketing – an organisation for the exchange of knowledge and best practice), adopt its tourism research and monitoring practices. This would help in benchmarking the performance of the Greater Belfast City region with other City destinations.

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[2] *See Appendix A*

BVCB's role within the tourism structure in Ireland IV

Introduction

4.1 The reorganisation of tourism following the 'Good Friday Agreement' resulted in the establishment of Tourism Ireland Limited ("TIL") as an all-Ireland destination marketing organisation with responsibility for promoting all of the island of Ireland overseas (including Great Britain).

4.2 The Northern Ireland Tourist Board has responsibility for promoting Northern Ireland within the island of Ireland and for the strategic development of the industry.

BVCB's position within the new structure

4.3 The BVCB is a public-private partnership responsible for marketing and for visitor servicing for the Belfast City region. Despite its remit, BVCB does not have the resources to assume a global marketing capability. With the resources available, BVCB must adopt a more targeted, focused approach, clearly defining which products and markets offer the best potential return and to which it can market effectively, while also identifying those markets where it can use and tap into the marketing activities of NITB, TIL and Belfast City Council.

4.4 Since BVCB is a membership organisation, it is at risk of being seen as a 'trade association' rather than a pure destination marketing organisation and therefore being driven by the demands of specific members or groups of members (rather than what is best for the wider region). BVCB is required to provide adequate support to the 'member' local authorities outside Belfast where the level of funding represents a small percentage (£117k or 4.3%) of BVCB's budget. This adds further stress to the already limited resources available to it. A cost benefit analysis that identifies the expectations of the local authorities and the realistic cost of meeting those expectations may create the opportunity that they increase their contributions to BVCB. Ultimately the judgement will be based upon added value. However, there should be no doubt amongst any of the members that Belfast is the driver of the regional economy.

4.5 TIL is funded on a 2:1 basis by the Irish Government and the Northern Ireland Assembly respectively. That is, Northern Ireland contributes one third (circa £14m) of Tourism Ireland's annual budget despite having approximately one tenth of the infrastructure capacity. The point has been made in the past that a deficiency in the tourism infrastructure in Northern Ireland precluded any significant growth. This is no longer the case, especially in the City region which has undergone substantial transformation in terms of infrastructure and products to attract and service visitors.

4.6 Future tourism growth for the City region and Northern Ireland more generally will require the reversal of the downturn in visitors sourced from Great Britain. TIL has a pivotal role to play in this regard, as does BVCB.

Working together effectively

4.7 In its future activities, BVCB will:

a) develop closer working partnerships with BCC and NITB to agree common messages that ensure the maximum return on Northern Ireland's investment in TIL;

b) assist in co-ordinating city wide promotional activity and budgets (where this will attract an outside audience);

c) focus on destination specific, rather than member specific, marketing; and

d) conduct a review of the service level agreement with each local authority member to ensure that BVCB is meeting its obligations under the agreement and that the cost of providing the support expected does not exceed the membership paid.

The Belfast Brand

4.8 The challenge for a city brand is that it must answer the questions:

a) what does the city have that no other city can claim which is authentic, believable and appealing to both internal and external audiences?;

b) is it of global significance?; and

c) can it be developed into a purchasable proposition that will position the city in key target markets?

4.9 It is essential that the Belfast brand differentiates Belfast from its competitors.

4.10 It is difficult to judge at this stage whether the new 'Belfast Inspired' brand has made any impact. There have been no tracking studies that we are aware of, nor are we cognisant of any focus group research on the brand's reach or penetration. Anecdotal evidence suggests that it is considered more a Belfast City Council logo rather than a City brand.

4.11 There is also the issue of timing and whether or not a city is ready for Brand treatment. If Belfast's key target markets continue to associate the city with its violent, political past then a branding exercise may be considered premature.

4.12 At this point, there is no single organisation engaged in developing the 'Belfast narrative'. In the short term, Belfast needs to continue to pursue an event – led strategy to re-position the city in key target markets to ensure maximum utilisation of the existing and new tourism assets. The current calendar of events for the City, and those planned for 2012, go some way to meeting this objective, but co-ordination between those responsible for delivery would appear to be limited and there remain gaps or weaknesses in the "spread" of events. For instance, New Year's Eve represents an opportunity to appeal to the family market. This is hugely successful in a number of US cities and attracts overnight guests from regional hinterlands and overseas.

4.13 In terms of progressing the Brand:

a) the relevant stakeholders should work together to determine the "next steps" in the development of the brand strategy, including agreement on which organisation is to be the custodian of the Brand;

b) a series of focus groups should be held in key target markets to determine responses to the Belfast brand. This should be managed and funded by the organisation nominated as the Brand custodian;

c) BVCB, NITB and BCC should work closely together in developing individual marketing plans for major Belfast based events (we understand that preliminary work by BCC in mapping all of the events is already underway (e.g. 2012 Titanic themed events). Provision has been made within the marketing plan for promotion based around the key events in the City, in line with the key strategies developed for Belfast, Northern Ireland and the Titanic Centenary, but additional resource will be required for the marketing of individual events; and

d) BVCB should begin developing and articulating the 'Belfast narrative' in conjunction with the Brand custodian to build brand awareness and brand equity.

Urban tourism V

Introduction

5.1 Urban tourism has a unique set of experiences to offer that are location specific. These are geared to:

a) ***events*** - that are driven by the arts, cultural industries, sports, retailing etc. that have led to City Breaks becoming the fastest growing sector of leisure tourism in the past decade; and

b) ***discretionary business tourism*** - otherwise known as Meetings, Incentive Travel, Conferences and Exhibitions ("MICE"), and which is concentrated largely in urban destinations as they have the range of facilities and attributes to satisfy the most demanding delegates.

5.2 As noted, BVCB does not have the resources to effectively target a global market and, in many cases, its resources and activities are spread too thinly over a broad range of markets and sectors. To be more effective, BVCB must concentrate its efforts on the two markets that are fundamental to the urban destination and on a select number of priority regions. It must also collaborate more closely with NITB, TIL and other global brand organisations based in Northern Ireland to achieve the growth targets required over the next three years.

5.3 With this in mind, BVCB needs to re-align its business strategy to concentrate on developing Belfast as:

a) a major European City Break destination (Leisure Tourism); and

b) the leading convention destination in Ireland (Discretionary Business Tourism), particularly in light of the development of The Convention Centre, Dublin.

5.4 It must also "own" the customer. The process of owning the customer is based on the principle that the Destination Marketing Organisation has been directly engaged with the customer through the entire process of:

awareness	>	to purchase	>	to customer satisfaction

Developing Belfast as a European city break destination

5.5 BVCB is faced with the very distinct challenge of re-focusing its leisure tourism efforts on city breaks with the specific objective of generating bed nights that will result in increased occupancy and yield of the hotel sector.

5.6 With tightening budgets and ever more stretched resources, the focus of BVCB's marketing effort needs to be driven by the principle:

Any proposed activity should be assessed on its ability to generate bed nights and increase occupancy. If it fails to satisfy these criteria it should be abandoned.

5.7 It has to be remembered that the justification for public sector support of destination marketing is wealth generation and job creation. BVCB needs to demonstrate its ability to generate customers that are attracted by those activities that are location specific to cities.

5.8 The process it needs to engage in includes:

a) developing a compelling narrative (Belfast's unique history, heritage and culture);

b) telling the story in key markets (Public Relations Activity);

c) ensuring the product is available and easy to buy through key distribution channels both traditional and new media (managing the supply chain);

d) customer awareness (marketing and sales effort) - ensuring there is no disconnect between the marketing promise and the customer experience (quality of service at point of delivery); and

e) performance management of the destination across a series of KPI's. Success will ultimately be measured by the utilisation of tourism capacity that will in turn generate wealth and create jobs.

5.9 The four resources BVCB has available to it in this critical endeavour are the physical and event attributes of the city (attractiveness capital), budget (financial capital), the skills and competencies of its people (intellectual capital) and systems and processes (efficiency capital). All four must be aligned if the organisation is to be successful.

5.10 The fastest growing sector of leisure tourism in recent years has been the city break. To meet this demand the traditional tour operator/travel agency responded with the introduction of 'packaged' city breaks. The following table identifies some of the key operators in this marketplace and Belfast's current status in terms of 'visibility':

Operator	**Some competitive cities featured**	**Belfast's visibility**
Superbreak	Manchester Edinburgh Liverpool	4 Hotels featured
Cities Direct	Dublin £204 Prague £267 Riga £199	6 Hotels featured Cheapest £170
Brilliant Trips	Dublin £199 Budapest £145 Paris £170	Not featured
City Vacations	Dublin £113 Amsterdam £119 Prague £94	Not featured
Great Escapes	Dublin £214 Prague £288	Not featured
Leger	Edinburgh £249 Amsterdam £229 Paris £149	Not featured
Letsgo2	Prague £133 Budapest £225 Amsterdam £129	Not featured
Travel Editions	An interesting specialist operator which designs short breaks geared to arts and activities (i.e. Bridge). Possible opportunities for Titanic, MAC, Lyric etc	Not featured
Travellers Cities	Prague £159 Budapest £159	Not featured
Thomson Cities	Dublin Prague (Hotels only)	Not featured.

5.11 If BVCB was able to focus its efforts and resources more on priority markets, rather than spreading its activities across such a broad range of sectors, it would be able to drill down into the priority segments and ensure full impact and visibility.

5.12 Presently, Tourism Ireland is running an advertisement for Belfast "City of Music" on the third party site lastminute.com. There is a limited amount of narrative on the appeal of the city in the bookings section of the site and no link from the advertisement (or the Belfast section) to the gotobelfast website, where a more comprehensive insight into the City region's appeal would be provided. BVCB will explore every opportunity with TIL to ensure that the City region is maximising its visibility on such sites.

The way forward

5.13 BVCB's future marketing activities will address the following:

a) Belfast is faced with an identity issue when trying to establish the destination within the City Break marketplace. None of the current on-line city break operators have it listed within Ireland and only some have it located in the U.K. This raises the question of 'positioning' within this market and is an issue for discussion with NITB and TIL. It may be strategically appropriate to consider positioning Belfast as a European City Break destination;

b) there is an opportunity to create a greater awareness of the quality of the Belfast experience through targeted public relations activity (e.g. in - flight guides) where there is direct air access;

c) the key "drivers" for choosing a city break are entertainment, arts and culture and historic sites. They help to challenge negative perceptions of the destination as they illustrate the existence of an enhanced quality of life within the region. By engaging with the sector more regularly BVCB can help develop the "compelling narrative" to leverage the positive brand value that can result. BCC should commission a Cultural Mapping study to enable the development of appropriate strategies (this exercise will identify the depth and breadth of the cultural sector in the city (including arts organisations, cultural bodies, creative industries));

d) the opening of the redeveloped Lyric Theatre and The MAC are major cultural events that will be addressed in BVCB's tactical plan;

e) Belfast's representation within key City Break operators needs to be strengthened. This will require engagement with the industry, and particularly accommodation providers;

f) BVCB's membership of European Cities Marketing ("ECM") means that it can participate in their City Card programme. This will provide an opportunity for the local industry to engage directly with the customer by offering special discounts that are available only to card holders;

g) the European Tour Operators Association ("ETOA") has combined with ECM to run regular workshops for city destinations and buyers. ETOA's tour operator members alone represent a combined buying power of over €5 billion, while ECM has a membership of more than 100 cities. The ETOA/ECM 'City Fair' is a one day event of pre-scheduled appointments dedicated to the lucrative and growing sector of city tourism. It is scheduled to take place in London in June 2011. This is a unique opportunity for European city DMO's and their suppliers to meet, network and conduct business with tour operators and city product developers from all over the world. BVCB will attend the event; and

h) every opportunity should be sought to maximise Belfast's 'share of voice' within the key target markets of Great Britain and Republic of Ireland through a targeted public relations strategy and in Europe through TIL, which should be provided with appropriate narrative for each market.

5.14 In addition to its own product offering, there is an opportunity for Belfast to 'piggy back' on other major events scheduled to take place around the UK both in terms of market intelligence and opportunities for partnership and strategic alliances (e.g. London 2012, Londonderry 2013 and Glasgow 2014 (Commonwealth Games)). An example of the preparatory work currently being undertaken by the City of London can be found on www.theculturediary.com. BVCB will take account of the information available on this site.

Developing Belfast as a leading convention destination

5.15 Discretionary Business Tourism is that sector of business tourism where the decision to choose a destination can be influenced by promotional stimuli (unlike independent business travellers). Regrettably, there are few reliable statistics as to the volume and value of the sector as the tourism statistics choose to use the general heading of Business Tourism to describe the sector.

5.16 Discretionary Business Tourism comprises the following categories:

a) National Associations;

b) International Associations;

c) Corporate meetings;

d) Government;

e) Exhibitions; and

f) Incentive travel.

5.17 The following sub segments are key to Belfast:

a) Medical;

b) Engineering;

c) IT;

d) Sport; and

e) Science.

5.18 BVCB has responsibility for the Associations market, while NITB is responsible for the corporate convention/meeting and incentive categories although a close working relationship exists between the organisations. The absence of purpose built high quality exhibition space in the City is limiting Belfast's opportunities in this particular segment.

5.19 While reliable statistics are unavailable at the national or international level, at city convention bureau level, discretionary business tourism is the most measurable sector of tourism. In every sense, the city convention bureau should 'own' the customer through the following process:

Generating the lead	>	Developing the bid	>	Converting the bid	>	Servicing the event	>	Post event management

5.20 The entire process can be 'tracked' to ensure delivery of a successful outcome.

5.21 One of the basic principles of a Convention Bureau is that the conferences they pursue are rarely 'one-off' events. This effectively means that a lost bid should not be a permanent loss. Failure to secure the event the first time will arise because either the marketing or the product was ineffective or unappealing. Identifying the reasons why provides the opportunity to address the issues and to re-bid until successful. The key message is "Never give up on a lead".

5.22 However, there is an important question that a convention bureau needs to answer at the outset of this process: *"When should it intervene in the process of selection between the client/customer and the venue/hotel?"*

5.23 If a single hotel unit can handle all of the client's/customer's requirements the convention bureau should not intervene in the selection process, rather it should simply distribute the enquiry to the hotels that can satisfy the criteria for selection and then disengage. The alternative is to be open to the charge of upsetting the natural competitiveness within the hotel sector. This, of course, does not mean that an event located within a single unit cannot ask the convention bureau to provide a range of services to that event.

5.24 A Convention Bureau's focus must be on attracting events that utilise more than one hotel or, what is sometimes referred to as, requiring citywide services. Belfast has a range of high quality venues or assets that could be utilised more effectively in promoting the City region as a high quality, competitive and alternate convention destination.

5.25 For the period April 2010 to November 2010, BVCB handled 152 enquiries of which only 13 (9%) were for greater than 500 delegates and 104 (68%) were for fewer than 200 delegates. Of this total, the conference "wins" can be analysed as follows:

Delegate numbers	**No of conferences**
Conferences attracting over 500 delegates	5
Conferences attracting between 300-500 delegates	15
Conferences attracting between 100-300 delegates	27
Conferences attracting fewer than 100 delegates	33
Source: BVCB	

5.26 The majority of enquiries and wins are for smaller scale conference events (i.e. less than 300 delegates). The objective going forward must be on attracting larger scale events utilising citywide services.

5.27 As of 21 January 2011, BVCB's "conference calendar" included the following bookings:

Year	**Events size**	**100 - 200**	**201 - 500**	**501+**	National	Int'national
2011	Number of events	**24**	**15**	**6**	22	23
	Delegates (total)	2,910	4,570	6,800	5,850	8,430
2012	Number of events	**5**	**3**	**3**	6	5
	Delegates (total)	665	1,100	3,400	2,965	2,200
2013	Number of events	**1**	**2**	**2**	1	4
	Delegates (total)	110	950	21,200	110	22,150
NB: 2 of the above noted events are Northern Ireland wide events related to World Police & Fire						
2013	Number of events	**0**	**1**	**0**	1	1
	Delegates (total)	0	400	0	TBC	400
Source: BVCB						
** While not a conference, the World Police & Fire Games is included as it will have a significant impact on city-wide resources.*						

5.28 The World Fire and Police Games (2013) excepted, the number of larger scale events booked for future years is limited in comparison the number of events of between 100 and 200 delegates. This illustrates that BVCB's convention bureau activities must be more focussed on addressing:

a) increased hotel capacity;

b) declining bedroom occupancy rates; and

c) reducing room yields.

5.29 Securing larger scale events will go some way to meeting these challenges. Activity in this area should be supported by rigorous evidence. There are sufficient examples of basic reporting methods of key performance measures for discretionary business tourism within international membership organisations such as ECM and Destination Marketing Association International ("DMAI"). BVCB will adopt these KPI's and reporting methods to provide an accurate assessment of the organisation's performance and to provide feedback to its trade partners and funders. DMAI is producing an updated version of their Performance Reporting Handbook[3] scheduled for publication in Spring 2011 (our recommendations to broaden the scope of the key performance indicators and ratios to be monitored are included at ***Appendix B***).

5.30 There is also the need to 'manage the supply chain' in terms of effective data gathering on the performance of the destination of Belfast across a range of key performance indicators (such as future bookings, gaps in demand, number of tourists, overnights stays, meeting room/bedroom occupancy rates, enquiry conversion rates, confirmed conferences, projected bookings and occupancy, the increase in bookings driven by specific campaigns). With that knowledge available it then becomes possible to develop effective strategies to improve performance.

5.31 In order to exploit the opportunities within the discretionary business tourism sector, BVCB will:

a) take the a lead in gathering prospect and performance related information and in stimulating ideas within the supply chain to develop "saleable" propositions.

b) restructure the Convention Bureau sales management team, so that the sales managers are organised on a sectoral basis (e.g. National Associations, International Associations). This will afford better focus in these key segments;

c) re-evaluate its plans to generate the discretionary business customers necessary to maximise the utilisation of the expanded capacity in Belfast. For instance, greater use of BVCB's membership in organisations such as the International Congress & Convention Association ("ICCA"), ECM, the Association of British Professional Conference Organisers ("ABPCO") or joining Destination Marketing Association International ("DMAI") and other database sources (such as Meeting Professionals International and Professional Convention Management Association) could be employed to gain access to conferences of the type and scale that match Belfast's expanded product profile; and

d) explore opportunities for greater participation in ABPCO through the expanded venue capacity in Belfast and, as a consequence, to mount a bid to host a future ABPCO conference. Utilising the opportunities the aforementioned organisations present will be key in boosting the region's profile and success in the convention market.

[3] *A copy of the 2005 DMAI Performance Reporting Handbook is attached as* ***Appendix B***

5.32 Every 1% of bedroom occupancy in hotels in the Belfast region equates to approx 13,300 room nights per annum. BVCB's stated discretionary Business Tourism target for the 2010-2011 year is 18,000 delegates generating 55,360 bed-nights. This equates to a contribution of around 4% of occupancy to the existing hotel supply. The preferred performance from a convention bureau in a developed city destination is a minimum contribution of 20% towards occupancy rates. This would require BVCB to set a target to deliver 332,500 bed-nights on existing hotel supply. However, BVCB is not directly responsible for discretionary corporate/incentive tourism promotion. In any event, such a target will take significantly longer to attain than the period over which this plan covers, but it does serve to illustrate the potential that this market offers over the longer term.

Building business and conference tourism

5.33 In developing discretionary business tourism for the City region BVCB will also:

a) concentrate on attracting larger scale conferences that will help utilise Belfast's increased capacity;

b) work with relevant partners to establish credible and reliable reporting of the performance of Belfast as a City Break and Convention destination (see para 5.29 & 5.30);

c) provide periodic and reliable performance updates its stakeholders;

d) when pursuing the City Break and Convention market sectors, focus on increasing occupancy and yield of the accommodation supply sector. The natural "knock on" effects will be spending at the attractions and events, in hospitality businesses and in the retail sector;

e) organise "flying squad" meetings (as and when required) with the hotel sector and other stakeholders to identify opportunities to market the City (such as when forward bookings are low, or there is a sudden shift in exchange rates) and to monitor performance; and

f) develop a business culture that seeks to answer three questions:

i) how many tourists?;

ii) how long are they staying?; and

iii) how much are they spending?

5.34 In short, if the activity does not contribute to increased levels of performance in any one of these areas, then it should be abandoned.

Visitor servicing VI

Introduction

6.1 Visitor servicing falls under the remit of each local authority area. Since April 2000 BVCB has managed the Belfast City Region's visitor servicing on behalf of BCC as well as operating the manned gateway Tourist Information Centres at Belfast International Airport and the George Best Belfast City Airport. In addition, BVCB provides a temporary visitor servicing facility at the Port of Belfast during the cruise ship season.

6.2 In all, these facilities in 2011/12 will deal with around 495,500 enquires per annum, of which around 355,000 are "across the counter" enquiries. Approximately 300,500 of that total are handled by the Belfast Welcome Centre ("BWC").

6.3 The quality of visitor servicing through BVCB's three information centres is highly regarded. As a measure of the importance of the Belfast Welcome Centre, it handled 40.2% of all Northern Ireland tourism enquiries in 2008.

The future

6.4 Currently, there is consideration being given to relocating the Belfast Welcome Centre. The rationale for the move is being driven partly by its current location (at first floor level) and the expectation that a new high visibility facility at ground floor level can better showcase the ambitions of the City in 2012/13, provide an opportunity to enhance commerciality (important in meeting a proportion of the costs of running the facility) and increase visitor spending in Belfast through the opportunity to better direct visitors to attractions, shows and events. It is envisaged that touch screen technology will be incorporated within the relocated centre to deliver information services. A review of recent new technology developments in a new state of the art TIC at the Visit Manchester Centre is being used as the basis for such a service in a new relocated ground floor TIC in Belfast.

6.5 Under a review of city-wide tourism structures if BVCB was to become a Destination Marketing Organisation rather than a Destination Management Organisation, then it could be argued that the DMO would not be responsible for visitor servicing as its primary responsibility should be to encourage visitors to the destination. Visitor servicing responsibility would then fall onto the local authority as is currently the case throughout other parts of Northern Ireland.

6.6 However, assuming that BVCB will continue to provide this function in the short to medium term, then it is essential that it has the resources to revisit its IT related visitor servicing tools. As noted, the migration of content to the internet means that visitors and those who market services to them have an abundance of sources for researching, planning and organising travel-related activities. Therefore, BVCB needs to be in the information pathways that potential customers travel as they make their decisions.

6.7 In adhering to the objective of 'owning the customer' there is a need to capture the customer from the moment they first visit the web-site for initial information until they return home following their visit. This can only be achieved through the alignment of the organisation's systems and processes based on web and mobile technologies. The BVCB/Belfast website needs to be further developed to enhance its level of sophistication, user-friendly design, and inter-activeness.

6.8 A website is a destination's window on to its database (Information Visibility). The quality of that database and the systems and processes that support it, are critical components in the development of Belfast's 'value proposition'. ICT systems need to be reviewed to ensure alignment with customer needs. In particular, the digital revolution is rapidly moving towards sophisticated mobile communication devices (Smart phones, iPhones) which can link directly with the internet at high speed and in almost any location. The ability to provide solutions that meet this rapidly expanding need will change the nature of visitor servicing. There will be a shift away from printed media as a result.

6.9 Through necessity, the merchandising element of the BWC has grown over the years to the point where it could now be said to dominate the current facility. Ideally, this should be scaled back substantially (and limited to Belfast and Northern Ireland branded goods and where the service is not in competition with the retail community) in order that more attention can be given over to providing tourist information and booking services to those using the centre (although much of this service could also be provided on line). Such a move is in keeping with the NITB Draft Visitor Information Plan, but would reduce the contribution from this function to the running costs of the BWC. Any shortfall will need to be met from other sources.

6.10 Against this background, Belfast's Visitor Information Servicing activities face a number of critical issues:

a) are manned tourist information centres the appropriate method of delivering information at Belfast's points of arrival? Should BVCB develop a partnership with a mobile phone/internet service supplier to ensure that upon arrival, visitors immediately receive a welcome message from BVCB providing access to the website on their handheld device?;

b) will all the services available in the new Belfast Welcome Centre be available in 'virtual' information centres?;

c) could commercially sponsored information kiosks situated at key points throughout the city and at key points of arrival provide access to BVCB's website?;

d) could BVCB partner with a company that could ensure access to BVCB's website on a dedicated channel in every hotel room in Belfast?;

e) packaging ideas to encourage longer stays (i.e. dynamic links to city break operators featuring Belfast to be posted on the web-site);

f) in opening new windows on to its database BVCB needs to resist the pressure to sacrifice functionality for design; and

g) is the city DMO the most appropriate mechanism for delivering such services on behalf of BCC for the city and NITB for Northern Ireland?

6.11 Clearly there are a range of considerations and opportunities in respect of visitor servicing that are unlikely to be addressed in the short-term. In particular whether, or not, BVCB continues to provide this service directly or the basis on which it moves forward with technology will require detailed assessment and consultation with appropriate stakeholders. The use of emerging technologies should be discussed in some detail with BCC & NITB since NITB has made a case for securing an IT capital budget to underpin the introduction of emerging technologies for the industry.

6.12 In the meantime, the visitor servicing priorities should be an extension of the work commenced in 2010, including:

a) undertaking training and capacity building through the Concierge Programme;

b) training in telling the Belfast story;

c) encouraging repeat visits and increased spend;

d) improving product knowledge about the City Region and Northern Ireland more generally amongst front-line staff (including Derry/Londonderry UK City of Culture 2013 since the Belfast airports are likely to be the key gateways for overseas visitors);

e) improving event sales through its ticketing service and encouraging greater use of the city's visitor attractions and increasing visitor spend;

f) ongoing work with cruise liners, improved racking and information provision at all transportation termini;

g) identifying and developing IT related customer servicing opportunities (i.e. podcasts, apps, mobile maps, virtual 3D tours);

h) steering visitors towards Belfast's cultural and heritage products or "trails"; and

i) ensuring that the Belfast story, when developed, and the messages for Titanic 2012 and the 400th Anniversary of Belfast's City Charter in 2013 are well known and articulated in the TICs.

Targets

6.13 Individual departmental targets for the year 2011/12 are detailed in ***Appendix E*** with the key targets summarised as follows:

Key performance indicator	Belfast Welcome Centre	Belfast International Airport TIC	George Best Belfast City Airport TIC
Visitor numbers	265,566	53,418	34,464
Total enquiries	348,636	77,832	69,039
Gross income	£972,501	£140,650	£76,300

6.14 Of note is the level of income generated from each of the TIC's and the total volume of enquiries.

Three year income and expenditure budgets

6.15 Detailed income and expenditure budgets for the period 2011/12 to 2013/14 are included at ***Appendix F*** and summarised as follows:

Visitor Servicing budgeted income and expenditure	**2011/12**	**2012/13**	**2013/14**	**Total**
Belfast Welcome Centre	**£'000**	**£'000**	**£'000**	**£'000**
Income				
Belfast City Council	479	479	479	**1,437**
NITB	162	162	162	**486**
Commercial activity	973	1,030	1,075	**3,078**
Total	**1,614**	**1,671**	**1,716**	**5,001**
Total Costs	**1,613**	**1,671**	**1,716**	**5,000**
Surplus/(deficit) for the period	1	0	0	1
Belfast International Airport				
Income				
Belfast City Council	19	19	19	**57**
NITB	47	47	47	**141**
Commercial activity	141	150	158	**449**
BVCB	13	13	13	**39**
Total	**220**	**229**	**237**	**686**
Total Costs	**220**	**229**	**237**	**686**
Surplus/(deficit) for the period	0	0	0	0
George Best Belfast City Airport				
Income				
Belfast City Council	31	31	31	**93**
NITB	21	21	21	**63**
Commercial activity	76	82	88	**246**
RTPs	5	5	5	**15**
BVCB	5	5	5	**15**
Total	**138**	**144**	**150**	**432**
Total Costs	**138**	**143**	**149**	**430**
Surplus/(deficit) for the period	0	1	1	2
Total cost (3 TICs)	**1,971**	**2,043**	**2,102**	**6,116**

6.16 The key points from the above analysis are:

a) the level of retail activity required to cover the cost of operating each TIC;

b) in the case of the gateway airport TICs the level of income and retailing at each is insufficient to cover the operating costs. Consequently, BVCB is required to redirect funding from its activities to meet the shortfall; and

c) any reduction in income from any source, or any unexpected increase in operating costs, will add pressure to BVCB to meet the "funding gap".

6.17 The estimated total funding requirement from each source over the 3 year period is summarised as follows:

Funding sources – visitor servicing	**2011/12**	**2012/13**	**2013/14**	**Total**
Income	**£'000**	**£'000**	**£'000**	**£'000**
Belfast City Council	529	529	529	**1,587**
NITB	230	230	230	**690**
Commercial activity	1,189	1,262	1,321	**3,772**
RTPs	5	5	5	**15**
BVCB	18	18	18	**54**
Total Gross Income	**1,971**	**2,044**	**2,103**	**6,118**

6.18 Over the 3 year period, commercial activity within the TIC's accounts for 61% of total gross income.

Introduction

7.1 In developing this marketing plan, consultation was undertaken with a wide range of stakeholders including public sector bodies, tourism development and marketing agencies, private sector representatives and area partnership boards. The purpose was to secure views on the performance of the region to date, the success of BVCB in driving tourism forward, where deficiencies may exist and where opportunities lie. A list of those consulted and the organisations they represent is included at ***Appendix C***.

7.2 The key strategies that, in one way or another, will influence tourism in the City region over the medium term have also been assessed.

Consultation

7.3 The diversity of stakeholders consulted mean that the views expressed were often given from a single perspective. It is unlikely that any marketing and visitor servicing plan can entirely satisfy the wishes of all of the individual stakeholders, but it can take on board those points that are likely to have the greatest degree of impact on the majority. In these circumstances, we have limited our summary from this exercise to those points or issues that were most often highlighted:

positive commentary

- there is general acceptance that Belfast should be in charge of its own image and destiny and that the most appropriate promotional vehicle is the BVCB. All stakeholders offered to collaborate on a more regular and meaningful basis with BVCB;
- the organisation has performed well over the past decade, but the environment has changed and so BVCB needs to reassess and change its approach

not so positive

- the emphasis of activity tends to benefit Belfast City Centre (we note that this is a natural consequence of recent investment in new infrastructure. In any case, Belfast is the engine that is driving demand. If any other product offering wants to hitch its wagon then they are welcome to do so but not if it is going to slow down the Belfast engine);
- there is little, or no, guidance/direction in terms of assisting in/advising on the development of products in peripheral areas that would add to/complement the Belfast experience (we note that this is more properly the role of NITB, rather than BVCB);
- the Belfast message is not sufficiently well articulated;
- there needs to be greater focus on discretionary business tourism;
- there is an opportunity and willingness for greater co-operation with stakeholders;

opportunities

- there should be some element of "lobbying" on behalf of the region including matters such as Air Passenger Duty, regulation of Bus Tours, opening of new direct access air routes;
- events are a significant draw for visitors – the nightlife/shopping message does not set Belfast apart from any other city. We must now focus on brand development;

- Northern Ireland is not getting its fair share of visitors from overseas – there needs to be more robust engagement with TIL. The Northern Ireland and Belfast messages get lost within TIL;
- the Belfast brand is seen more as a brand of Belfast City Council rather than being "owned" by the City and its people;
- key markets for BVCB should be Ireland, Great Britain and the domestic market, closely followed by those overseas markets with direct air access;
- we need one headline event each year to underpin the comprehensive calendar of events that has been developed; and
- the marketing approach and tools need to be innovative.

7.4 There is substantial goodwill towards BVCB, and interest in working more cohesively with it to plan initiatives in predefined target markets. There is also a recognition that BVCB has had to spread its resources too thinly, and now needs to focus on the markets that offer easier wins (i.e. closer to home and direct access markets).

7.5 Our earlier assessment of the role of a DMO is that it should be focussed on driving overnight visitors to the destination and that it must be sufficiently well engaged with, and knowledgeable about, the destination's assets that it can develop appropriate strategies and tactics to meet this objective. Following this basic principle would appear to address a number of concerns voiced by stakeholders.

Tourism development strategies and plans

7.6 We have also been mindful of the key strategies and action plans designed to drive tourism forward in the medium term, including the Integrated Strategic Framework for Belfast Tourism ("ISFBT") 2009 to 2014, the Tourism Strategy for Northern Ireland and the draft Northern Ireland 2012 Business Case.

7.7 The ISFBT has been developed between BCC and NITB with the vision: *"Belfast, working in partnership, will deliver the authentic capital city experience by developing and co-ordinating our cultural, natural and commercial assets to attract a greater number of visitors to the city and maximise the economic benefits for Belfast and Northern Ireland"*.

7.8 In elaborating upon this vision, Belfast will:

- develop a strong reputation as a vibrant capital city with unique and exciting experiences that, once visited and enjoyed, will compel return visits time and time again;
- spread the economic benefits of tourism across the whole city;
- offer a broader range of access services – air, sea, road and rail;
- consolidate its position as a welcoming gateway for tourists to Northern Ireland and the island as a whole;
- enhance its position as a (discretionary) business tourism destination;
- stage a consistent annual programme of events and festivals – including a major high quality event each year and especially those that are unique to Belfast;
- possess much improved services and facilities, including easier means of moving around; more accommodation options; and an upgraded array of shopping, catering and entertainment facilities; and
- offer all with a distinctive Belfast flavour, in an environment of attractive and ambient urban and natural spaces.

7.9 It is evident from various studies that visitors are attracted by Belfast's culture and heritage and its "novelty" value. The Belfast brand proposition reflects these features: *"A* *unique history and a future full of promise have come together to create a city bursting with energy and optimism"*. The brand promises revolve around experiences, people, character, authenticity and discovery. However, as noted, the on the ground perception is that the Belfast brand is not as well established as it could be.

7.10 The key market opportunities outlined in the ISFBT are consistent with those identified during the consultation exercise (that is, Great Britain, Republic of Ireland, Northern Ireland, direct access European markets and other overseas longer stay markets that may include Belfast as part of a trip to the island). The strategy also maps out the infrastructural and spatial deficiencies that must be addressed if the City is to develop into a unique and appealing destination over the longer term. The marketing activities outlined in this plan recognise the work that has gone into developing the ISFBT.

7.11 The Tourism Strategy for Northern Ireland ("TSNI") sets out to provide a clear and inspiring vision for the development of Northern Ireland's tourism experience through to the year 2020. Over the decade, the objective is to double revenue from tourism and increase visitor numbers by 41%. In the current economic climate these are challenging targets, however, recent and ongoing investment in tourism infrastructure projects by both the public and private sectors should ensure that Northern Ireland as a destination is better placed than at any other time in its recent past. A high quality experience in all that we offer will be essential in ensuring the success of the TSNI, as will collaboration at all levels.

7.12 The years 2012 and 2013 are seen as the "tipping point" for tourism in Northern Ireland, when the critical mass of attractions will represent a genuinely new experience that must be capitalised on. It is expected that 50% of all visitors to the country will be from the closer to home markets. Short term market segments include city breaks (especially those that are event led), culture/experience seekers, activity and special interest breaks and business visitors (national associations, corporate meetings/conferences, incentive travel and trade/consumer exhibitions). Belfast stands to gain substantially from recent and ongoing infrastructure investments and the short-term opportunities identified above.

7.13 Against the background of 2012 and the Tourism Strategy, NITB and BCC appointed independent experts to develop the business case for a successful and high profile series of events in 2012 that can yield a step change in perceptions about the province.

7.14 The Northern Ireland 2012 Business Case ("NI 2012") notes that *"by 2012, Belfast will have as good a physical infrastructure for festivals as any of the world's significant cultural destinations. The key to the success of all of these assets will be the cultural product which animates them".* The Business Case, which is seeking around £7m in funding, set the following objectives:

- create a positive and distinctive visitor experience for those who travel to Northern Ireland;
- showcase Northern Ireland on a local, national and international stage as a unique place to live, learn, work and visit, raising the profile and changing perceptions;
- explore notable events in Northern Ireland's history and celebrate its many great contributions to the world through a sensitive, co-ordinated and customer focused programme;
- build awareness and interest amongst the Northern Irish diaspora that will motivate them to come home during 2012 and beyond;
- develop a volunteer greeters' programme for Northern Ireland to ensure a warm welcome and high quality visitor experiences at events;
- stimulate a sense of belonging and pride amongst local people; and
- provide a unique marketing opportunity to grow visitor numbers.

7.15 The priority markets for NI 2012 will be the Domestic, Republic of Ireland, Great Britain, North America and European markets and in particular, the targeting of leisure and

VFR (visiting friends and relatives) traffic (amounting to 150,000 staying visitors throughout Northern Ireland). We are of the view that the United States will prove to be a difficult market in the immediate short-term given the state of the economy. Canada should prove an opportunity market given its distinctive Northern Ireland associations (although no direct access air service currently exists). One needs to be careful when considering spending scarce marketing funds on VFR traffic that will travel despite the DMO. This segment does not contribute to bed nights and yield to the same degree as pure tourists and discretionary business tourism.

7.16 We understand that the proposed budget for NI 2012 has yet to be agreed as have the mechanisms for delivering, managing and marketing the planned events. Given the role of BVCB and the Tourist Information Centres it manages, it should be at the forefront of assisting all stakeholders in exploiting the opportunities the forthcoming period presents.

7.17 The visitor growth targets set out in the ISFBT and the TSNI are summarised as follows:

Growth targets:	**2008 actual '000**	**2009 est. '000**	**2010 est. '000**	**2011 est. '000**	**2012 est. '000**	**2013 est. '000**	**Avg. Annual increase**
ISFBT							
Total overnight visitors	1,600	1,666	1,722	1,787	1,854	1,923	3.8%
inc Holiday visitors	500	536	575	617	662	710	7.2%
Nights	**5,100**	**5,197**	**5,296**	**5,396**	**5,499**	**5,603**	**1.9%**
TSNI - Visitor numbers							
Domestic			1,154	1,177	1,201	1,225	1.4%
Great Britain			1,285	1,324	1,363	1,404	2.2%
Rep of Ireland			322	345	369	394	5.5%
Germany			50	53	56	60	4.9%
France			38	40	41	43	3.2%
Italy			23	24	24	25	2.2%
Netherlands			23	24	25	27	4.2%
Spain			41	41	42	42	0.6%
Other Europe			91	95	98	102	2.9%
United States			156	161	167	174	2.8%
Other			78	78	82	83	1.5%
Total			**3,261**	**3,362**	**3,468**	**3,579**	**2.4%**
Total Out of State			**2,107**	**2,185**	**2,267**	**2,354**	**2.8%**

7.18 The ISFBT sets out growth targets under 3 scenarios, these being 'low', 'medium' and 'high'. Given the current economic climate, we consider the targets under the 'low' scenario as being the most realistic in the short term (and this is reflected in the above table). For comparison, the average annual growth rate in the number of overnight visits under the 'medium' and 'high' scenarios is 2.80% and 3.65% respectively. No analysis of increase in visitor numbers by geographic source is included within the ISFBT.

7.19 The estimated average annual growth rate in visitor numbers over the period 2010 to 2013 under the TSNI is 2.4% overall, with an annual rate of increase of 2.8% from out of state markets. No estimate of visitor nights has been provided. No indication of growth by market type (i.e. business, leisure) has been provided.

7.20 Those markets where above average levels of growth are expected to arise are the Republic of Ireland, Germany and the Netherlands (the latter two being relatively small markets for Northern Ireland overall), whereas the rate of growth from Great Britain is expected to be less than the overall average (circa 2.3% per annum throughout Northern Ireland). Given that the Belfast region historically accounts for around 1 in 3 of all Northern Ireland visitors, and that the region will be the "centre of attention" in 2012 and into 2013, it is crucial that the BVCB growth targets over the period 2011 – 2014 at least match those in the ISFBT and the TSNI.

7.21 Tourism Ireland Limited's ("TIL") role in promoting all of the island of Ireland to overseas markets means that it has important role to play in attracting tourists to the Belfast City region. Its marketing plan for 2010 set an objective to grow the number of promotable visitors to Northern Ireland to 2 million over a 5 year period. Standalone campaigns were at the core of this objective with a particular focus on the signature projects, scenery and Belfast as the City of Music and Titanic 100 years on.

7.22 Specific themes in key markets were:

a) Great Britain: *Titanic: 100 years on* and *Titanic Experience 2012*; *City of Music*

b) Europe: *Belfast: City of Music* and *Titanic: 100 years on*; and

c) United States: *Titanic: Made in Belfast* (at a recent exhibition in New York).

7.23 During the consultation exercise, the strengths and weaknesses of the region, the threats facing it and the opportunities available to it were considered. The output from this exercise is summarised as follows:

Strengths	**Weaknesses**
The City and region	
Cultural product – people, music, food, art, literature, history and heritage	Still needs more variety of things to do and see – building on key themes. Absence of Cultural Mapping Strategy.
Compact city and surrounding region – with variety of product (city; mountains; coast; rural)	Inconsistencies in the quality of the tourism product and service
Character and people	Lack of cafe culture and restricted opening times
Still seen as a relatively new destination to visit	No integrated conference and exhibition facilities
Some high quality and varied venues and visitor attractions (museums, zoo, City Hall, theatres, W5, Odyssey, Stormont, shopping, hills, …….)	Message and marketing activities need to be more coordinated across the various bodies The Belfast Brand is not currently used as a differentiating competitive strength.
Good track record with events and festivals, and strong potential for more	Need for more coordination and packaging of the tourism product available across the various areas within the City and the wider region.
Availability and range of accommodation	The key marketing messages and USPs need to be more clearly communicated. Absence of compelling narrative in support of brand positioning.
	Tightening budgets and resources for marketing the region
	Need to use more new media for marketing the region

Opportunities	Threats
The Belfast Story – which has still to be told as a complete and coordinated tourism product (industrial heritage; the building of Belfast; culture; music; history and major achievements).	Economic uncertainty and recession – contracting the market and tourism investment.
2012 and 2013 – including the Titanic Signature project and Maritime Heritage	Intensifying competition, as market conditions become more difficult.
Developments and development opportunities which will enhance the cultural tourism product and visitor experience – MAC; Connswater Community Greenway; Crumlin Road Gaol; Gaeltacht Quarter	Perceived as being expensive compared with other destinations. Recent VAT increase to 20% will add to this concern.
Coordinated marketing of the various tourism 'areas' across the greater Belfast region (City Centre; Queens Quarter; Cathedral Quarter; Gaeltacht Quarter; North Belfast Cultural Corridor; Lisburn Road; Titanic Quarter; The Lagan River-Maritime Corridor; Belfast Hills, Belfast Castle and Belfast Zoo; Connswater Greenway; The Shankill Road; North Down; Lisburn District; Carrickfergus; Newtownabbey...)	Reduced direct access air routes to Belfast. Increased UK air passenger duty makes North American flights to Northern Ireland significantly more expensive than into Ireland (duty of £120 –v- €10)
Collaboration between key stakeholders	Ripples of political unrest
Availability of conference subvention scheme	BVCB does not re-align its marketing efforts, change its operating procedures and approach to communicating with the industry.
	City marketing budgets are not realigned Engagement across the industry lost

7.24 Many of the current weaknesses identified and threats facing the region are borne out of current and emerging trends within the industry or of the wider economy. A comprehensive summary of those trends is included at ***Appendix D*.**

7.25 During the course of two workshop sessions, one with senior management from within BVCB and the other with the BVCB and BCC Tourism, Culture and Arts Unit management teams, consideration was given to the appeal of the region. Belfast has a variety of products and experiences to offer the visitor during their stay. However, the challenge is to identify those products and messages which will attract visitors to Belfast in the first place - those aspects of Belfast, and the Belfast region that are ***unique***, and could provide ***stand out*** and serve as key ***attractors*** to the region.

City-wide marketing priorities and challenges

7.26 It was agreed that culture, in its widest sense, should be the priority product offering where culture refers to:

a) The Belfast Story (history; industrial heritage, including the Titanic and Maritime theme; key achievements; famous personalities, the people and their welcome...); and

b) Festivals and events (incorporating music, food, literature, art, theatre and creative industries…).

Key themes and messages

7.27 The following key messages and attributes should be reflected across all marketing communication:

a) ***The welcome and the people*** – the friendly personal approach; the craic; the characters;

b) ***A modern City*** – promoting Belfast as a modern destination, that still offers an authentic experience in terms of culture, people and entertainment;

c) ***A 'new' destination –*** Belfast is still seen as a relatively 'new' and undiscovered destination, so retains the advantage of intrigue and novelty. This should be exploited, and some efforts made to prolong this interest – a 'cool' and edgy destination; emerging from, but not dwelling on, the Conflict, and always offering new experiences and variety; and

d) ***Compact and relaxing –*** a compact destination where visitors can see and do a lot in a relaxed manner.

7.28 It is much more effective to focus the marketing message on these unique selling points, than to try to spread it across all of the available product areas – once visitors are attracted to the region, visitor servicing has the capability to ensure that the variety of products and services available are fully promoted.

7.29 These messages are consistent with the Belfast brand, which is intended to portray Belfast as a dynamic city, with personality, a memorable experience, a proud culture and heritage, and an optimistic future. The key messages revolve around the experience, people, authenticity and discovery. As outlined above, TIL has utilised a number of our cultural themes in 2010 for promotion in overseas markets.

Products and messages

8.1 The table below sets out the key markets and the primary products that can stimulate interest in the region over the coming 3 year period and which should be used in tactical communications. These are consistent with the key strategies developed for the region and for Northern Ireland:

Market	Segment (messages)	Primary product	Support product
City break (closer to home markets)	***Short break*** (Titanic experience welcome, modern, new, City of Music)	Events, Heritage attractions (i.e. Museums, Zoo), Cultural Quarters.	Food, Retail, Night life, Entertainment, Coastal region, rural hinterland
	Micro break (Titanic Experience, welcome, compact, authentic)	Events, culture, sports	Night life, Retail
	Activity (compact)	Walking, sailing, nature	Relaxation, access to hills, sea etc
	Curious (welcome, authentic)	Troubles tours, Heritage attractions	Food, Night life
	Special interest (Titanic Experience, welcome, authentic)	Maritime, conflict resolution, Ulster Scots, Gaelic, Music, Literature	Access, Modern v History
Tour groups	(welcome, authentic, new)	Heritage attractions, VFM	Retail
Touring (to encourage short break)	(Titanic experience, welcome, compact, authentic)	Access, touring routes, attractions, events	VFM, local food
Short break/touring (long haul)	(Titanic Experience, welcome, authentic, compact)	Events (2012/13), Heritage attractions (i.e. Museums), Culture, Genealogy, Access	Food, Retail, Night life, Events, Scenery (outside the region), activities

Market	Segment (messages)	Primary product	Support product
Discretionary business tourism	***Closer to home*** (welcome, new destination)	Access, variety of interesting venues, welcome, small city (ease of movement), industrial heritage, vibrancy	Heritage attractions, golfing, night-life, retail for Partner programmes
	Europe/longer haul (welcome, new destination)	Access, universities, interesting venues, industrial heritage, current industry specialisms (food, pharma etc)	Heritage attractions, golfing, night-life
Day trips Domestic/RoI	(welcome, compact)	Events, attractions retail (inc. markets) VFM for o/night stays	Food
Cruise	(Titanic Experience, welcome, authentic, new destination)	Cultural/heritage attractions (i.e. Belfast's Quarters, Museums, Signature project), scenery/attractions outside region	Retail

8.2 Different themes and messages are relevant to each market and to each market segment.

Channels and partnerships

8.3 The following communications channels and partnership arrangements are recommended in promoting the city region to its key market prospects:

Geographic	market	channels	Key partners
Great Britain	**city break**	Road show, carrier campaigns, 3rd party /specialist sites, in flight mags, outdoor, editorial, FAM trips	TIL/carriers/hotels/BVCB
	discretionary business	Trade show, member organisations, database mining, FAM trips, face to face	Ambassadors/Trade/NITB/TIL/BVCB
	gateway touring	advertising, 3rd party /specialist sites, editorial,	TIL/Carriers/BVCB
Republic of Ireland	**city break**	Road show, advertising, 3rd party /specialist sites, editorial, outdoor, FAM trips	NITB/BVCB/BCC

Geographic	market	channels	Key partners
	day trip	advertising, editorial, outdoor	Private sector/BCC/ NITB/BVCB
	all island touring	advertising, 3rd party /specialist sites/publications, editorial	TIL/NITB/Carriers
	discretionary business	Trade show, member organisations, database mining, FAM trips, face to face	Ambassadors/Trade/NITB
Mainland Europe (direct access)	**city break**	Road show, advertising, 3rd party /specialist sites, editorial, outdoor, FAM trips	TIL/carriers/BVCB
	discretionary business	Trade show, member organisations, FAM trips, face to face	TIL/NITB/Invest NI/Trade/BVCB
North America	**city break/holiday**	Road show, advertising, 3rd party /specialist sites, editorial, FAM trips	TIL/BVCB
	discretionary business	Trade show, member organisations, FAM trips, face to face	TIL/NITB/Invest NI/BVCB
Domestic	**city break**	Advertising, 3rd party /specialist sites, editorial, BVCB web site	BCC/NITB/Trade/BVCB
	discretionary business	face to face	BVCB/Trade
	day trip	Advertising – outdoor, radio, tv	BCC/NITB/Trade
Other	**Coach tour/sport**	Trade shows, members bodies	TIL/NITB/BVCB
	Cruise	Trade shows, editorial specialist press, face to face	TIL/BVCB

8.4 Other longer haul and emerging markets should be serviced by TIL alone.

8.5 In the years (2007/2008) when average occupancy and achieved room rates were at a peak, Belfast hotels chose not to develop the Tour Group market (which is typified by low pricing but high volume). Given the change in the profile of demand at hotels and the loss of corporate business, this market may be worth pursuing (but it is not a priority sector and will be driven by hotels being prepared to discount heavily).

8.6 A city-wide programme of promotional activity plan is included at ***Appendix G***.

BVCB marketing plans IX

Introduction

9.1 The environment in which BVCB operates is changing.

9.2 On the one hand, the infrastructure and appeal of the Belfast City region is as good as it has been, while on the other hand, prolonged economic uncertainty means that in an industry where the highest proportion of spend is discretionary, competition for tourists is intense. It could be said that the only certainly in the short to medium term, is uncertainty, and this extends to funding for DMOs from whatever source.

9.3 As noted elsewhere, the main focus of BVCB's marketing efforts should be on stimulating demand from the City Break and Discretionary Business Tourism markets to deliver over night stays, higher levels of spending and improved tourism asset utilisation and profile for the region.

9.4 Promoting to the day trip market should only be undertaken where the cost of doing so does not dilute BVCB's efforts in, or funds for, generating bed-night sales or where opportunities exist to convert the day trip market to overnight stays.

9.5 In assessing the activities and functions of BVCB, 3 key points emerged. The result is that this Plan is underpinned by the following foundations:

a) **engagement** – BVCB will work closely with its stakeholders and partners to shape and develop products, services and propositions for our key markets (including co-ordinating a city-wide marketing plan), to leverage marketing opportunities and to understand and monitor performance levels in the region;

b) **articulation –** BVCB does not have the resources to compete in every market that it may wish to. It must articulate the messages to those with the budgets (primarily TIL and to a lesser extent NITB) that can take the lead in marketing Belfast in overseas markets; and

c) **focus –** emphasis must be on attracting overnight visitors to the City region from those markets that offer the best prospects.

Role

9.6 BVCB must be able to demonstrate its ability to create customers for the city and to maximise the utilisation of the expanded tourism infrastructure. In order to meet this challenge, marketing effort should be assessed on:

its ability to generate bed nights and increase occupancy - if it fails to satisfy these criteria it should be abandoned

Vision, aims and objectives

9.7 BVCBs vision statement remains:

"to establish Belfast as a world class visitor destination by increasing the contribution that tourism makes to the economy in a way that is customer-focused, delivers a quality solution in a cost-effective way, respects the environment, is acceptable to the local community and offers sustainable growth"

9.8 The strategic aims of the organisation, as set out in its previous 3 year plan remain valid, with minor amendments as necessary:

Aim	Objectives
Working together….	in partnership with Belfast City Council, NITB and other funders at strategic and operational level to provide a truly integrated marketing function that focuses on the delivery of strategic objectives for the Belfast City Region and Northern Ireland as a whole
	with stakeholders to ensure a joined-up approach to tourism development, clarity of roles and responsibilities and most effective allocation of resources
	to maintain excellent working relationships with BCC, NITB, TIL, all the industry, members, customers and suppliers to ensure the strategic aims and objectives for Belfast and the region are delivered
Growing Value and Difference….	by focussing on unique features and experiences to grow interest and target our marketing activities and resources at key source markets and sectors with greatest potential for tourism growth
	positioning and differentiating Belfast's uniqueness as a worldwide tourism destination by ensuring that Belfast's brand proposition underpins all communications and achieves the widest possible penetration
	focusing on Belfast's business tourism potential
	create, drive and deliver innovative marketing campaigns through the integration of on-line tools and applications in all marketing and promotional activity, engaging proactively with visitors before, during and after their visit
Showcasing Belfast and Northern Ireland….	communicate and reinforce the Belfast brand promise and characteristics through integrated marketing activities and publicity to capitalise on strong consumer interest
	nurture and expand Belfast's role as a welcoming gateway, and through effective visitor servicing, inform and encourage visitors to explore all the city and the rest of Northern Ireland through our 3 TICs
	anticipate and respond to visitor needs by providing comprehensive visitor information and services that engage, communicate, tell our stories and add value – before, during and after their visit
	reflect the unique character, culture and heritage of Belfast at every to generate wider interest
Generating Measurable Results ….	implement a planned and integrated approach to marketing the City to ensure the best return on marketing investment
	incorporate a proactive and flexible approach to continue to meet the challenges and respond to uncertainties of the global economy
	monitor and measure the effectiveness of all BVCB activities and marketing campaigns to evaluate performance against targets and objectives
	deliver best value for money from all our marketing, visitor servicing and operational programmes

Aim	Objectives
Building Foundations for the Future…	make Belfast a 'must visit' destination for the future
	engage with our key markets – let our partners develop new and developing markets by building awareness, interest and curiosity in the region with our narrative
	ensure BVCB and Belfast are firmly positioned to capitalise on new growth and market opportunities that emerge as the industry recovers from the global downturn
	assist in building interest and awareness of Belfast and Northern Ireland in advance of the world-class Titanic Signature Project and the London Olympics in 2012, the World Police and Fire Games and Belfast 400th birthday celebrations in 2013

BVCB's target markets and tactics

9.9 BVCB's priority markets, messages and products are summarised below as are the communications channels:

Market	Segment (messages)	Primary product	Support product
City break (closer to home markets)	***Short break*** (Titanic experience welcome, modern, new, City of Festivals)	Festivals & Events, Heritage, attractions, Cultural Quarters.	Food, Retail, Night life, Entertainment, Coastal region, rural hinterland, music
	Micro break Shopping (Titanic Experience, welcome, compact, authentic)	Retail, events, culture, sports, VFM for O/N trips	Food/Night life, Retail
	Activity (compact)	Walking, sailing, nature	Relaxation, access to hills, sea etc
	(welcome, authentic)	Troubles tours, Heritage attractions	Food, Night life
	Special interest (Titanic Experience, welcome, authentic)	Maritime, conflict resolution, Ulster Scots, Gaelic, Music, Literature	Access, Modern v History
Tour groups	(welcome, authentic, new), VFM	Heritage attractions	Retail
Touring FIT (to encourage short break)	(Titanic experience, welcome, compact, authentic)	Access, touring routes, attractions, events	Vfm, local food

Market	Segment (messages)	**Primary product**	**Support product**
Day trips Domestic/RoI	(welcome, compact), City experience, vale for money, unique aspects	Events, attractions retail (inc. markets)	Restaurants/cafes, tours
Discretionary business tourism	***Closer to home*** Local ambassador, unique experience, (welcome, new destination)	Access, variety of interesting venues, welcome, small city (ease of movement), industrial heritage, vibrancy	Heritage attractions, golfing, night-life, retail
	Europe/longer haul (welcome, new destination)	Access, universities, interesting venues, industrial heritage, current industry specialisms (food, pharma etc)	Heritage attractions, golfing, night-life
Cruise	(Titanic Experience, welcome, authentic, new destination)	Cultural/heritage attractions (i.e. Belfast's Quarters, Museums, Signature project), scenery/attractions outside region	Retail

9.10 From the above table it is clear that different themes and messages are relevant to each market and market segment.

Channels and partnerships

9.11 The following communications channels and partnership arrangements are recommended for BVCB marketing activity in promoting the city region to its key market prospects:

Geographic	**market**	**channels**	**Key partners**
Great Britain	**city & micro break**	Road shows, advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	TIL/carriers/hotels/BVCB/ Trade
	discretionary business	Trade shows & workshops, member organisations, database mining, FAM trips, face to face/sales calls	Ambassadors/Trade/ TIL/BVCB
	gateway touring	Road shows, advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	TIL/Carriers/BVCB/ Trade
Rep of Ireland	**city break**	Advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	NITB/BVCB/Trade
	day trip	Advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	NITB/BVCB/Trade
	discretionary business	Member organisations, database mining, FAM trips, face to face, sales Calls	Ambassadors/Trade/NITB
Mainland Europe (direct access)	**city break**	Road shows, advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	TIL/carriers/BVCB/ Accommodation
	discretionary business	Road shows, advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	TIL/Trade/BVCB

BVCB marketing plans IX

Geographic	market	channels	Key partners
North America	**discretionary business**	Trade show, member organisations, FAM trips, face to face	TIL /Invest NI/BVCB
Domestic	**city break**	Advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	BCC/Trade/BVCB
	day trip	Advertising (above & below the line), digital, social media & web, PR, FAM trips and trade workshops	BCC/Trade
Other	**Coach tour/sport**	Trade shows, members bodies	TIL/NITB/BVCB
	Cruise	Trade shows, specialist press, digital, sales calls	BVCB/Belfast Harbour Commissioners

9.12 In the short term, given current resources, BVCB is not in a position to proactively market the destination and product in long haul and emerging markets. However, BVCB will continue to support incoming Tourism Ireland fam trips.

9.12 Below is a summary of key tactical changes that will help to drive overnight volume to the City region from the key markets.

City breaks

9.13 BVCB's marketing plans will focus on the drive to increase the volume of overnight stays from short-haul, direct access markets. BVCB will:

- ensure increased exposure on city break third party web-sites;
- attend relevant trade shows in Great Britain ("GB") and Ireland;
- undertake a series of road shows in GB and in Dublin. In GB, priority will be given to direct access Northern Cities (i.e. Liverpool, Birmingham, Manchester, Glasgow, Edinburgh etc). This will be supported by advertising and poster campaigns (significantly less costly in these cities than is the case in London);
- ensure that TIL advertisements for the Belfast City region on third party sites include a link to the gotobelfast web-site;
- undertake with TIL, a series of road shows in direct air access cities in Continental Europe (Paris, Barcelona, Amsterdam) supporting carrier campaigns;
- work with sea carriers to promote routes into the region to the touring market (using Belfast as the gateway with a short-stay element);
- evaluate the benefits of joining the ECM City Pass programme;
- join key trade bodies and attend meetings/events (i.e. ECM/ETOA City Fair event);
- identifies tour group operators (if not covered under the City Fair event or NITB Meet The Buyer Events) to market the City;

- secures public relations exposure in "in-flight" guides/press to boost the City's reputation and profile; and
- utilise the marketing potential of 2012 as a key attractor.

Discretionary business tourism

9.14 BVCB will take the lead in the Associations segment, and will continue to work in tandem with NITB in the Corporate and Incentives segments. The emphasis for BVCB will be on larger scale events, particularly those that require city wide services.

9.15 A review of the source of conference enquiries over the period 1 April to 31 December 2010 shows that of the total of 154, one third (53) were sourced through the Ambassador Programme, 19 were member referrals, 16 were phone enquires and 13 were generated via the BVCB web-site. The balance was sourced from referrals, attendance at trade shows, BCC, NITB and via membership of trade bodies amongst others. The drive to increase the volume of bookings from the Discretionary Business Tourism market will require:

- further development of the Ambassadors programme;
- attending relevant trade shows in GB, Ireland and Europe;
- working with Invest NI to identify those industries where Northern Ireland has a specialism, and which Invest NI is promoting, and target those sectors for conference bookings;
- packaging interesting and exciting itineraries that set the region apart from other destinations;
- working with the supply chain to make sure that the City is price competitive in this marketplace;
- securing membership of a broader range of industry bodies (see ***Section V***) to gain access to conference databases/prospects;
- utilising a broader range of key performance indicators to manage and monitor performance and sharing this information with the trade and partners;
- ensuring feedback on failed bids is communicated with the supply chain – agree the necessary changes and re-bid for the event the following year; and
- increasing one to one meetings with PCOs.

9.16 Detailed tactics employed and cost estimates are included at ***Appendix E.***

Day trip

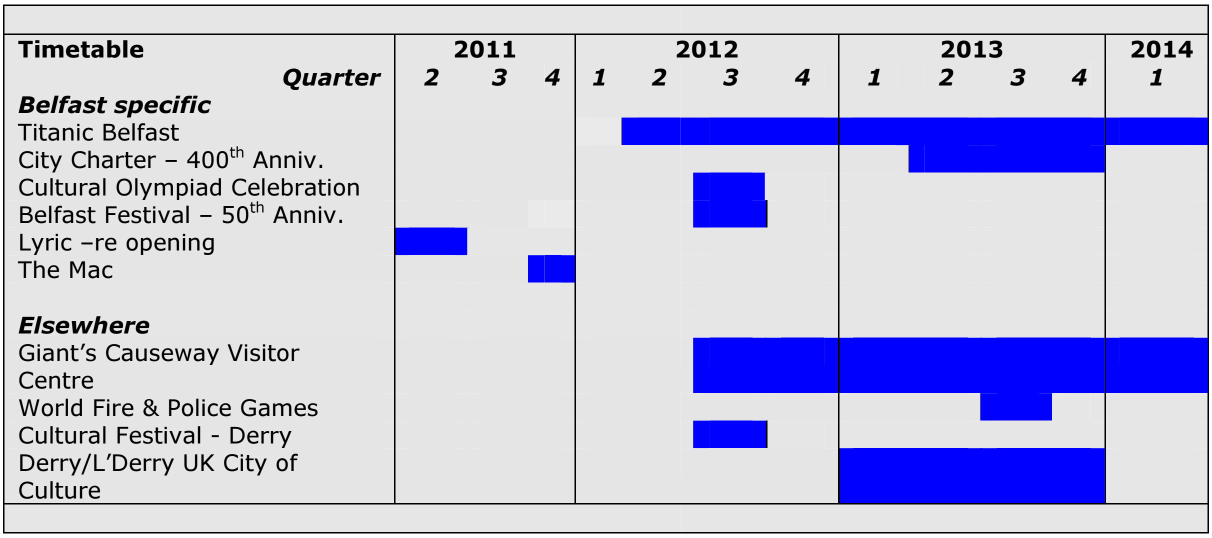
9.17 Whilst BVCB's focus is to increase overnight stays, the day trip market will in the short term continue to be an important element of the tourism economy and our marketing plan. The key objective will be encouraging traditional day trip visitors into overnight stays. Festivals, events, shopping and attractions with a seasonal focus offer the best opportunities, especially to those further away locations in Northern Ireland and in the Republic of Ireland. Value for money will be key in the conversion process and this requires engagement with the trade in developing/promoting these value packages. The programme of events being planned for 2012 presents a particularly strong basis for generating day trips and overnight stays from these markets. Additional budget will be required to develop event-led marketing campaigns that have the potential to deliver visitors outside the greater Belfast area and to encourage conversion to overnight stays.

Headline targets

9.18 Using the most recent Millward Brown Ulster Tourism Monitor results (for 2009) as a baseline (for 2010/11) for setting future targets, and recognising the importance of at least recording average annual increases in line with the ISFBT and TSNI, the following targets have been set:

City Growth targets:	2010 est. '000	2011 est. '000	2012 est. '000	2013 est. '000	Avg. Annual increase
Overnight stays					
Domestic	432	441	450	459	2.0%
Great Britain	1,549	1,610	1,675	1,742	4.0%
Rep of Ireland	1,346	1,414	1,484	1,559	5.0%
Europe	147	153	159	166	4.0%
North America	311	323	336	349	4.0%
Other	113	115	117	120	2.0%
Total	**3,898**	**4,056**	**4,222**	**4,394**	**3.9%**
Total OoS	**3,466**	**3,616**	**3,772**	**3,935**	**4.3%**
Day trippers					
Domestic	5,830	6.000	6,305	6,620	4.3%
Scotland	22	24	27	28	8.5%
England & Wales	31	32	36	37	6.5%
Rep of Ireland	1,654	1,654	1,736	1,824	3.3%
Europe	5	5	6	6	6.9%
North America	7	7	8	8	5.7%
Other	2	2	2	2	5.7%
Total	**7,551**	**7,730**	**8,120**	**8,526**	**4.4%**
Total OoS	**1,721**	**1,725**	**1,814**	**1,905**	**3.9%**

9.19 As regards overnight stays, the total average per annum increase over the period is 3.9% which is in excess of the level of increases set out in the ISFBT (including the 'high' level scenario - see para 7.18) and in the TSNI. This is considered to be achievable given the key events that will take place in and around the City region in the coming years:



9.20 The increase in day visitors is expected to accelerate rapidly in 2012 on account of the Titanic Centenary celebrations, with a 10% increase from most geographic markets during the year, but reducing thereafter to 5% growth annually. These are aggressive growth targets, but realistic in the circumstances. Either Belfast will take a step change in 2012 or it will not happen at all.

9.21 So far as conference related bookings are concerned, the prospects in this segment remain challenging due to the economic climate and increased levels of competition. Dublin now has a purpose built facility which removes our competitive advantage on the island of Ireland. Nevertheless, high quality conference and associated facilities is a "given" in any destination that competes in this marketplace and it could be argued that Belfast is at least competitive in this regard (dedicated exhibition facilities excepted). As noted, over the period 1 April to 31 December 2010 BVCB hosted 154 conference enquiries and secured 80 bookings (a conversion rate of 52%). This equates to approximately 18,000 delegates and 55,000 additional bed nights secured for future years.

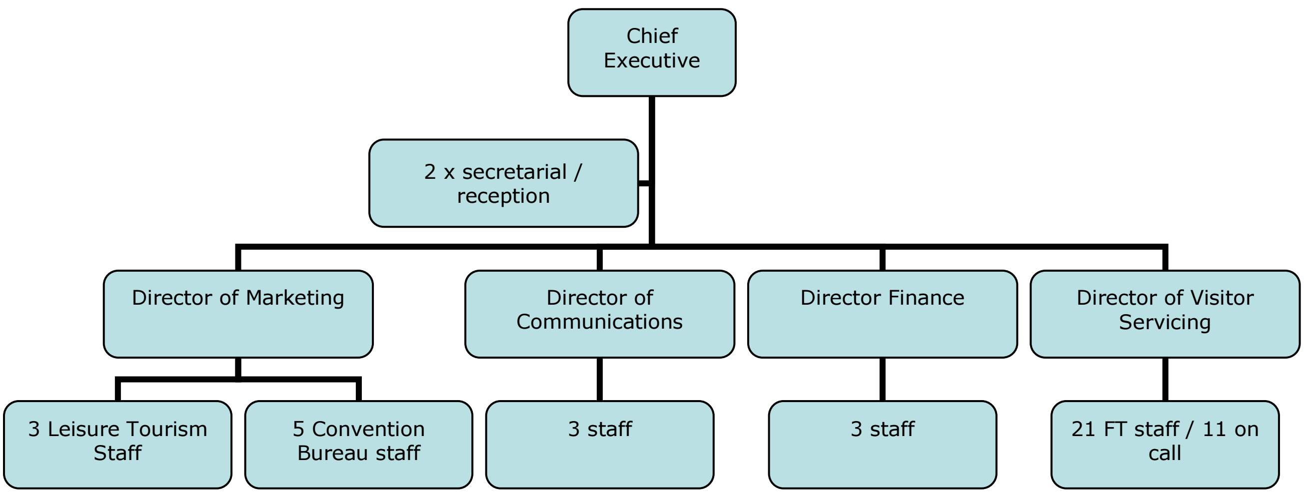
9.22 The current BVCB conference team has been in place for approximately 6 months. Subject to minimal or no staff changes in this regard, and taking account of increased utilisation of the Ambassador programme, full and collaborative engagement between all partners in the supply chain, BVCB's participation in a broader spectrum of trade bodies, and the commitment by BCC to a Conference Subvention Programme, the following targets have been set:

New bookings secured	2010 baseline	Target 2011/12	Target 2012/13	Target 2013/14
Estimated Delegate numbers	18,000	26,000	34,000	38,000
Estimated Bed nights	55,000	78,000	102,000	114,000
Estimated Value	£17.9m	£25.8m	£33.8M	£37.7m
% of available annual room nights *	4.1%	5.8%	7.7%	8.6%
** based on hotel bedroom supply at 31 Dec 2010.*				

9.23 To help with the process of supply chain engagement and collaboration, a **Discretionary Business Tourism Taskforce** will be established. Its purpose is to review conference enquiries, progress, actions by members to help turn live enquiries into confirmed bookings, and to critically assess, learn from and agree corrective measures in response to failed bids. This process will improve the region's prospects "next time around". For events that have been hosted, there should be a record of actual numbers attending compared against those estimated. The taskforce should meet on a quarterly basis and include representatives from BVCB, NITB, BCC, key venues, the Belfast Hoteliers Group and carriers.

Staffing

9.24 The current staffing structure of BVCB is summarised diagrammatically as follows:



9.25 Going forward BVCB will align its resources against the marketing requirements of this plan, as appropriate. For example, there is a need for some minor amendments to the responsibilities of the two sales managers within the Conference Bureau (see para 5.31). In addition the Marketing or Communications Director should be involved in Brand development and the narrative for each market (see para 4.13).

Operating costs and funding

9.26 In preparing the operational cost estimates in conjunction with BVCB, we have had to make a number of broad assumptions.

9.27 Primarily these are driven out of current uncertainties regarding public sector budgets. In particular the preparation/issuing of draft departmental budgets, arising out of the UK spending review, and the current process of consultation means that NITB is not yet in a position to commit funds to BVCB, nor to be specific about the level of funding that may be made available to it.

9.28 Inevitably, there will also be pressures at local government level and it is likely that private sector members will be reassessing their spending commitments in the coming years. For this reason it will be crucial that we engage with our partners to clearly outline its objectives and targets for the coming 3 year period, and on a regular basis thereafter to inform them of progress.

9.29 Against this background the following assumptions have been applied in preparing the operating cost estimates:

a) staff salaries, which have been frozen for the past two years, will continue to be fixed at current levels for the foreseeable future;

b) funding from BCC and NITB will remain at current levels. **Any significant reduction in commitment from either source will compromise the City's ability to drive tourism forward**;

c) most local authority partners will remain as members;

d) the private sector will continue to support the organisation through membership;

e) under any new service level agreement with NITB, it will be possible to reallocate funding for certain current activities (i.e. visitor servicing of Cruise Liners), to activities that are focussed on generating room nights; and

f) BVCB will take a more commercial approach to securing income from trade members where this is aligned to trade shows, road shows and so on.

9.30 In essence, we are working on the basis that the core budget available to BVCB is unlikely to increase in any significant way in 2011/2012 or in the following 2 years. In order to direct spending on those key markets identified in ***Section VIII***, certain historical activities have been pared back, including:

a) direct participation on long haul sales missions (i.e. Australia, North America and emerging markets) – it will be the role of TIL to promote the region in these markets (with appropriate input from BVCB);

b) fully funding a regular coach shuttle service from Port of Belfast to the BWC during the Cruise season – BVCB will encourage the private sector to deliver or pay for most of this service. Funds that would have been spent by BVCB can be reallocated to marketing the City;

c) leveraging every opportunity to work alongside TIL and NITB in our key markets and utilise their facilities at shows/events etc (unless a separate Belfast presence is considered an absolute must); and

d) no further non-IT related marketing of Luxury Belfast. Luxury Belfast was successfully used as a positioning strategy for the City and can now be incorporated in the overall marketing proposition.

9.31 The objective is to improve the value for money proposition by generating more high value business for the region, but utilising the same level of resources through:

a) redirecting spending at the Associations market;

b) engaging more fully with trade bodies to "tap" into their prospect databases;

c) enhancing marketing and communications in our key City Break markets. Key gateways in Dublin, the North of England and Scotland will be marketing priorities, but BVCB will also work with TIL to promote the region in the key direct access gateway cities in Europe;

d) securing exposure on a wider range of on-line City Break provider web-sites;

e) making sure that every bid produced for future conference trade will be of the highest quality and that any failures are quickly identified, disseminated and addressed. If difficult conversations need to take place within the supply chain, they will be;

f) working with TIL and NITB to drive the all island touring market through Belfast; and

g) working with TIL to articulate the Belfast message in the long-haul markets.

9.32 A detailed, costed, operational plan for 2011/12 is included at ***Appendix E***. It includes associated performance targets, timing of activities and expected trade income. Within the same Appendix, we have also included a detailed cost and funding plan, clearly showing the application of funds to each activity. The following tables provide a summary of both plans:

Marketing and communications summary budget 2011/2012

9.33 Budgeted expenditure on leisure marketing, conference bureau activities and commensurations, is summarised as follows:

BVCB Budget 2011/12	**BCC**	**NITB**	**Private sector**	**Local Auth.**	**Total**
	£	**£**	**£**	**£**	**£**
City Break Campaigns					
City Break Campaigns GB	132250	0	174667	8333	315250
City Break Campaigns ROI	0	100000	80000	0	180000
City Break Campaigns Europe	3167	0	46334	2499	52000
City Break Campaigns NI	78000	0	75000	0	153000
City Break Campaigns Belfast Events	100000	0	0	0	100000
Total City Break Campaigns	313417	100000	376001	10832	800250
Leisure Marketing					

BVCB marketing plans **IX**

Collateral production	114667	35000	72334	24999	247000
Product Marketing Activity	28000	20000	15000	0	63000
Exhibitions and Sales Visits	4001	0	34351	3498	41850
Cruise Marketing	0	4000	9500	4000	17500
Familiarisation Visits	0	10300	0	0	10300
Research Project Costs				9000	9000
Belfast RTP funding of BCA TIC				5000	5000
Total Leisure Marketing	146668	69300	131185	46497	393650
Total Web & Digital	47834	15500	21660	20006	105000
Conference Bureau					
Exhibitions & Sales	0	65000	12934	1666	79600
Advertisements	0	5000	3000	0	8000
Ambassador Programme	0	19500	6500	0	26000
Association & Membership Activity	6000	0	0	0	6000
Bid & Promotional Materials	0	3000	7000	0	10000
Site Inspections & Fam Trips	630	5500	6870	0	13000
Secondary marketing	4500				4500
Booking Commission & Database Maintenance	0	0	7700	0	7700
Total Conference Bureau	11130	98000	44004	1666	154800
Communications					£
PR Activities	11844	0	38156	0	50000
Improving Competitiveness	20500	0	10500	0	31000
Press Fam Trips	0	25700	5300	0	31000
Media Briefings & Events	6000	0	10000	0	16000
PR Expenses	17500	0	26000	0	43500
Total Communications	55844	25700	89956	0	171500
Staff costs	693584	62000	27444	4333	787361
Overheads	144523			16666	161189
Total costs funded by:	1413000	370500	690250	100000	2573750
	54.9%	14.4%	26.8%	3.9%	100%

See Detailed Operational Plan at ***Appendix E*** for related KPI's.

BVCB marketing plans IX

9.34 The cost items recorded under the Local Authority column will be funded from neighbouring council membership fees. The "other" category relates to expenses funded from trade membership subscriptions, income from advertising and sponsorship and from additional income generated from member attendance at trade shows, exhibitions and road shows etc. It is clear that any substantive reduction in funding will have serious implications for the marketing of the region.

9.35 Individual departmental targets for the year 2011/12 are detailed in ***Appendix E*** with the key targets summarised as follows:

Leisure Marketing	**Conference Bureau**	**Communications**
50,000 website visits/mnth	Secure 28,000 delegates	Host 120 press trips
Present to 30 agents/operators in direct access mkts	Secure 78,000 bed nights	secure £3.5m advertising equivalent
20 tour leads (Germany)	£25.8m of conference trade	120m weighted opps to see
20 leads from WTM	Recruit 70 new ambassadors	Secure PR coverage for 230 articles
Secure 31 cruise ships	Secure interest of 60 buyers	Produce & distribute 12 issues of the Corporate (product) e-zine
Organise 20 fam trips/300 trade visitors	40 new leads in Europe, 40 in UK, 10 in USA	Produce & distribute 12 issues of the Consumer (product) e-zine
Secure additional 158,000 bed nights (v 2009)	Host FAM trip	Issue a minimum of 36 (Corporate and Product) press releases
Secure additional 179,000 day trippers (v 2009)	Submit 120 bids/60% conversion rate	Attract 5,000 followers through social media outlets

9.36 The total estimated budget for marketing is summarised as follows:

BVCB Budget 2011/12	**BCC**	**NITB**	**Private sector**	**Local Authority**	**Total**
	£	**£**	**£**	**£**	**£**
Total City Break Campaigns	**313,417**	**100,000**	**376,001**	**10,832**	**800,250**
Total Leisure Marketing	**146,668**	**69,300**	**131,185**	**46,497**	**393,650**
Total Web and Digital	**47,834**	**15,500**	**21,660**	**20,006**	**105,000**
Total Conference Bureau	**11,130**	**98,000**	**44,004**	**1,666**	**154,800**
Total Communications	**55,844**	**25,700**	**89,956**	**0**	**171,500**
Staff costs	693,584	62,000	27,444	4,333	787,361
Overheads	144,523			16,666	161,189
Total costs funded by:	**1,413,000**	**370,500**	**690,250**	**100,000**	**2,573,750**
	54.9%	**14.4%**	**26.8%**	**3.9%**	**100%**

9.37 Of note is the balance of funding across the major stakeholder groups. Public sector support allows BVCB to leverage additional private sector funding in the form of sponsorship, advertising and participation in trade related events amounting to approximately £690k per annum. Clearly, any reduction in funding from BCC or NITB will have a "knock on" effect on private sector support and will substantially diminish BVCB's ability to meet its objectives.

Three year marketing income and expenditure budget

9.38 Detailed income and expenditure budgets for the period 2011/12 to 2013/14 are included at ***Appendix F*** and summarised as follows:

Year	2011/12	2012/13	2013/14	Total
Income	**£'000**	**£'000**	**£'000**	**£'000**
Belfast City Council	1,413	1,413	1,413	4,239
NITB	371	371	370	1,111
Other local authorities	100	100	100	300
Private sector income	690	763	653	2,106
Total	**2,574**	**2,647**	**2,536**	**7,756**
Non overhead expenses				
Support for GBBCA TIC	5	5	5	15
Marketing/communications	1,620	1,677	1,530	4,827
Total	**1,625**	**1,682**	**1,535**	**4,842**
Overheads				
Salaries	787	796	825	2,408
Other overheads	153	160	167	480
Depreciation	8	8	9	25
Total	**948**	**964**	**1,001**	**2,913**
Surplus/(deficit) for the period	**1**	**1**	**0**	**2**
Salaries as a % of income	30.6%	30.0%	32.5%	31.0%
Total overhead as a % of income	36.8%	36.4%	39.5%	37.6%
Marketing/Comms as a % of income	62.9%	63.3%	60.3%	62.2%

9.39 The key points are:

a) income secured from the private sector is expected to increase in the 2012/13 on account of the production of a new conference guide an increase in marketing costs is estimated in the same year); and

b) in overall terms, the BVCB is expected to break–even or record a small surplus in each year. This means that the organisation has no capacity to cover unexpected expenses without drawing budget away from marketing activities. Ideally, it should be in a position to build up a modest level of reserves to provide some cover for such eventualities.

Years 2012 and 2013

9.40 The years 2012 and 2013 offer a major opportunity for Northern Ireland. As noted, a comprehensive programme of events is being planned underpinned by celebration of the Titanic Centenary, but budgets and their application have yet to be finalised. The draft business case prepared for 2012 noted that marketing must:

a) be of a significant scale and be creative and innovative;

b) be more than the sum of the parts – consistent branding and key messages;

c) strongly branded;

d) reinforce the positioning of the new Northern Ireland brand;

e) generate news stories and strong iconic images for the media;

f) generate new stories and a buzz about Northern Ireland;

g) be taken up by locals and those who have visited;

h) target opinion formers in NI, ROI, GB;

i) have a clear and easy call to action and fulfillment; and

j) start in 2011.

9.41 Given the Northern Ireland wide benefits expected to arise from 2012 it was suggested that marketing be undertaken by TIL and NITB. While this is logical, there will also be a role for BVCB in promoting the Centenary in conjunction with its City Break activities especially (in much the same way as the 2009 Tall Ships event). While the marketing activities planned by BVCB for the years 2011/12 and 2012/13 make provision for the Titanic Centenary and the City of Belfast's 400th Anniversary, any substantial uplift in such activity will require additional budgetary resource, for which separate marketing plans should be developed.

Strategic/long term changes

9.42 A number of issues that are more strategic or longer term in nature have been highlighted elsewhere in this document and they will, in some shape or form, play a role in further improving the City region's prospects or performance monitoring. These include:

a) BCC should undertake a Cultural Mapping exercise (para 5.13c);

b) commission a comprehensive review of BVCB's ICT operations including web and mobile technologies (para 6.7 & 6.8); and

c) the review of delivery structures in the city including destination marketing and destination management (para 6.5 & 6.10g).

9.43 The cost of these reviews has not been included within the above budgets.

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Agenda Item 3a

Belfast City Council

Report to:	Development Committee
Subject:	**Revised draft of the Belfast City Council framework to tackle poverty and reduce inequalities**
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Jelena Buick, Policy & Business Development Officer, ext 3229

1	**Relevant Background Information**
1.1	A proposal for a corporate poverty and inequalities framework was first presented to the Development Committee in November 2009. Following a series of further committee meetings, workshops, individual party briefings, and an all-party briefing on 11 October 2011, the latest draft was presented to Committee on 8 November 2011.
1.2	At the most recent Development Committee meeting Members requested that a decision on adopting the framework be deferred for a further two weeks to allow an opportunity for individual Members to seek clarifications and if required to propose amendments to the draft. It was agreed that this would be particularly useful for newer Members of the committee who might not have had the opportunity to become fully informed on all aspects of the draft.
1.3	Members should note that the proposals for the framework have become closely linked to the proposed Stimulus Investment Package. Both initiatives are based on the understanding that the council has a useful contribution to make in alleviating some of the effects of the economic downturn on our citizens and on local businesses. The framework also recognises the need to address the existence of inequalities and pockets of extreme deprivation within the city in order to emerge successfully from recession and enhance international economic competitiveness.
1.4	It is, of course, not solely within the council's gift to end poverty in Belfast (nor to solely end the economic downturn). But with some additional co-ordination; a greater focus on the barriers faced by those in poverty who wish to use our services; and by offering a strong supporting and advocacy role with our partners; it is possible to make our services more accessible, better targeted and ultimately more effective for those most in need.
1.5	The draft being presented with this paper contains a series of revisions and additions based on the input from Members over the past ten days.

2	**Key Issues**
2.1	Listed below is an overview of the main issues raised by Members over the past two weeks concerning the previous draft of the framework. Working to a short turnaround time officers have revised the draft to reflect these issues:
2.2	(1) 'The council can only play a supporting role in addressing the causes of poverty' The revised framework now puts greater emphasis on the fact that the elimination of poverty requires sustained intervention by government at both regional and national levels. However, the framework presents the case that the council also has important contributions to make by: - Ensuring that our services are more accessible to those in poverty; - Looking for opportunities to make more effective and targeted use of our existing resources; - Working with our partners (both statutory and community based) to enhance their own service delivery to those in poverty; - Raising awareness of the plight of an increasing proportion of Belfast's population who are at risk of falling into poverty; - playing an advocacy role with Government for those most at risk as an integral part of the council's emerging external relationships strategy; - Holding other statutory bodies to account.
2.3	These contributions are by no means insubstantial. Given the large number of services that we deliver at a local level, there are clear opportunities for the council to have a direct and positive impact at modest cost to the rate-payer.
2.4	(2) 'The role of partners in tackling poverty' Members noted the primary role of Northern Ireland Government Departments in addressing the causes of poverty in Belfast. It is obvious that there are a wide range of necessary interventions to be made at this level such as early years programmes; economic development initiatives, tackling worklessness; health interventions; education and skills; targeted investment in deprived and interface areas and tailored support for families and older people. The Executive has made commitments to many of these strands of work in its Lifetimes Opportunities strategy.
2.5	The Belfast City Council framework does not seek to supplant this government strategy. As noted above, we only have a specific range of limited interventions at our disposal. The framework proposes that the emphasis should be on partnership working and enhancing our advocacy role with Government on behalf of those Belfast citizens who are most at risk.
2.6	(3) 'The framework should focus on actions that will have the highest impact' There was broad agreement that the framework should emphasise those actions that link to existing council work and which will have the most direct impact on those in poverty. The action plan focuses on such activities as employability and skills initiatives; improving access to our services; advice provision; projects around food and fuel poverty and an active engagement to create the correct conditions for the eventual removal of peace walls.

	(4) 'How much will the framework cost?'
2.7	Earlier drafts of the framework did include specific budgets against individual pieces of work where these were available. These estimates were removed in later drafts as, over the intervening months, many ceased to be up to date.
2.8	Revised budgets (and staff time commitments) have now been included in the draft where available. It should be noted that, given the nature of the framework (in that it is encouraging the adaptation of existing strands of work) it is difficult to include budgets against all items.
2.9	In total over five years, the budget for delivery of this framework across the whole council is around £1.7 million (which includes existing initiatives), but in addition, the council receives around £5.3 million through grants and external funding. However, the cost of delivering only new initiatives would be around £150,000 (excluding few initiatives without indicated budget). The income is predicted to be around £44,350 which brings the current cost for the council to be around £105,000. It is worth mentioning that there is a potential to attract up to €500,000 through EU funds to deliver a specific project within this framework.
	Members also requests estimates for staff time against each action. These have also been added to the revised draft where available.
2.10	(5) 'Measuring our impact' The council places great emphasis on effective performance management to allow us to better measure the impact of our work. The revised draft proposes an approach that, while not overly burdensome, will allow Members to track the impact of the framework against a basket of indicators.
2.11	The framework will be reviewed after its first year to determine its effectiveness. As part of this process, a more robust performance framework would be established based on an outcomes model. Key external agencies (statutory and civic) will be engaged with as part of this review. This would make a much more robust link between the outcomes we want to achieve regarding poverty, the indicators we would use to measure them, and the actions we aim to deliver. This approach would not be possible in the first year of the framework as the majority of the proposed work is based on pre-existing initiatives.
2.12	(6) 'Specific changes within the action plan' Based on the feedback from the Committee meeting on the 8th November and individual input by different councillors, we have slightly revised the action plan by: - Removing development of a website (too time consuming with limited added value) - Adding an action on 'exploring alternative finance arrangements' (it would address specific needs in the city) - Adding actions on more active lobbying and developing partnerships (it would strengthen our role) - Adding majority of employability programmes the council supports (to be comprehensive) - Adding columns with budget and income (as requested by majority of Members) - Merging 'supporting skills programmes through our community centres' with 'raising skills' action

	- Focusing more on initiatives that can make a difference, i.e. employability - Ensuring that the 'new' initiatives have not already happened (because the development of the framework started two years ago) and - Simplifying monitoring and reporting action (to avoid bureaucracy)

3	Resource implications
3.1	Budgets for actions are identified within the framework. The majority of these are accounted for within existing service budgets.
3.2	The budget for a public consultation of £10,000 is included within the Policy and Business Development unit budget for 2011/12.

4	Equality and Good Relations Considerations
4.1	This framework aims to contribute to a reduction in inequalities. An initial equality screening identified the potential positive impact of the framework for many of the Section 75 groupings.
4.2	If the framework is adopted it will be subject to a statutory twelve week public consultation. The consultation will determine the results of the final equality impact assessment.

5	Recommendations
5.1	Members are asked to: 1. Approve the revised draft framework to tackle poverty and reduce inequalities 2. Agree to a twelve week public consultation. 3. To agree to a review of the framework after its first year of operation.

6	Decision Tracking
Timeline: March 2012	Reporting Officer: John McGrillen

7	Key to Abbreviations

8	Documents Attached
Appendix 1 – Revised draft framework to tackle poverty and reduce inequalities.	

Poverty and social inequalities in Belfast:

A corporate framework for action

Draft for Development Committee, 22 November 2011

Contents

1. Purpose of this document

This document describes a framework that brings together a number of key council services and activities to ensure realistic and appropriate corporate support for the growing number of our residents and their families who are experiencing poverty during the current economic downturn.

The framework:

1. Offers a broad definition of poverty and its causes;
2. Briefly examines the growing levels of poverty amongst Belfast's residents;
3. Explains the supporting role and contributions council can make in supporting residents (while recognising the key role of other agencies);
4. Describes specific actions we can take (either directly or in a supporting or advocacy role); and
5. Outlines a method for measuring the impact of these actions.

This document, if approved by the council, would then form the basis of a public consultation process to test its viability and assess its equality impact.

2. Background

There is a growing consensus within the council that we have a worthwhile contribution to make in helping to alleviate the effects of the most severe economic downturn that Belfast has faced in a generation. Members are currently considering a package of measures to support the city's residents and businesses during this difficult period.

The economic downturn, alongside the ongoing public sector cuts, is expected to have the greatest impact on the city's families in poverty. Recent research by the Institute of Fiscal Studies[1] states that, based on the latest economic forecasts, 'absolute child and working-age adult poverty are predicted to rise continuously in the UK between now and 2014'.

It is, of course, not within the council's gift to end poverty in Belfast (nor to end the economic downturn). But with some additional co-ordination; a greater focus on the barriers faced by those in poverty who wish to use our services; and by offering a strong supporting and advocacy role with our partners; it is possible to make our services more accessible, better targeted and ultimately more effective for those most in need.

Poverty in Belfast

Poverty remains one of the most persistent and significant issues facing Northern Ireland with Belfast being particularly badly affected. Nearly half of our city's population live in some of most deprived Super Output Areas in Northern Ireland[2].

OFMDFM's Central Anti-Poverty Unit states that '*people are considered to be living in poverty if their income and resources are so inadequate as to prevent them*

[1] Child and Working Age Poverty and Inequality in UK Institute for Fiscal Studies, October 2011
http://www.ifs.org.uk/comms/comm121.pdf

[2] http://www.ninis.nisra.gov.uk

from enjoying a standard of living, which would be regarded as acceptable by society generally.' [3]

Across Europe a more quantitative definition of household poverty is *'one with an (equivalised) income that is 60% or less than that of the median household income in the year'.*

Under this definition around 20% of Belfast's population live in relative poverty (which is higher than the EU average of 16%)[4] In absolute terms this works out at around £115 per week for a single adult with no dependent children or £195 per week for an adult with two dependent children under 14.

Causes of poverty

The causes of poverty are many and varied. Perhaps unsurprisingly poverty is most strongly associated with worklessness. Children's poverty in particular is directly linked to living in households where no adult is employed. But households at the fringes of the labour market are also at substantial risk because of low wages – the 'working poor'.

Benefits and tax credits, that are supposed to act as a safety net, are sometimes too low to protect families from poverty. Chronic ill health, poor education and living in a deprived area can all contribute.

In terms of who is mostly at risk of poverty, households headed by a lone parent with dependent children are at risk; pensioners when they are entirely dependent on state pensions and associated benefits, and ethnic minorities.[5]

While concentrations of such 'at-risk' households can be mapped to particular parts of Belfast, it is important to note that such households can exist in any part of the city – and are often 'hidden' in statistical analyses.

3. The role of government

The elimination of poverty requires major and sustained fiscal and monetary interventions at national and regional levels.

Northern Ireland Government Departments have the major statutory responsibility and the resources for directly tackling the causes of poverty in Belfast, especially Department for Social Development, Department for Employment and Learning, Belfast Education and Library Board and Belfast Health Trust. It is obvious that there are a wide range of necessary interventions to be made at this level such as early years programmes; neighbourhood renewal,; economic development initiatives, tackling worklessness; health interventions; education and skills; and tailored support for families and older people. The Executive has made commitments to many of these strands of work in its Lifetimes Opportunities and Child Poverty strategies[6].

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[3] OFMDFM Central Anti-Poverty unit http://www.ofmdfmni.gov.uk/index/equality/central-anti-poverty-unit.htm (accessed 11 October 2011)
[4] 'Poverty in Belfast', M. Morrissey (2008)
[5] ibid
[6] http://www.ofmdfmni.gov.uk/central-anti-poverty-unit (access 7 November 2011)

The role of the council

The Belfast City Council framework does not seek to supplant this government role. We only have a specific range of limited interventions at our disposal. However, the framework proposes that the council can play an important role with an emphasis on working in partnership with Government, and others, as a key local service provider and as an advocate for our citizens experiencing poverty.

Belfast City Council can make important contributions that will have a direct impact on our residents by:

1. Ensuring that our services are more accessible to those in poverty;
2. Looking for opportunities to make more effective and targeted use of our existing resources;
3. Working with our partners (both statutory and community based) to enhance their and joint service delivery; and
4. Raising awareness of the plight of an increasing proportion of our city’s population who are experiencing poverty and playing an advocacy role for those most at risk.
5. Effectively engaging people in or at risk of poverty, particularly in areas in and around interfaces where the legacies of conflict are most stark

These contributions are by no means insubstantial. Given the large number of services that we deliver at a local level, there are clear opportunities for the council to have a direct and positive impact at modest cost to the rate-payer.

Practical examples

There are a number of practical ways in which the council could adapt or extend its existing work in modest ways to more effectively address issues of poverty. For example, on a small scale we offer many programmes at both our leisure centres and our community facilities. Decisions around the design of such programmes, their pricing, opening times and their promotion can inadvertently impede those in poverty from availing of them.

Similarly, there are existing significant strands of work supporting programmes in twelve Neighbourhood Renewal areas; our fuel stamp programme; and our support for advice services across the city. We have recently begun work with Land and Property Services to directly promote their Rate relief programme to communities through our leisure and community centres. Our employability and skills programmes (such as the HARTE programme), our programmes for local economic development, job creations and support for social economy enterprises all directly address worklessness – one of the root causes of poverty in the city.

On a citywide scale our contribution to the new Belfast Health Development unit and the Belfast Strategy Partnership offer many opportunities to influence the design and implementation of a large raft of health and wellbeing programmes and activities that are closely associated with those living in poverty.

The wider impact

There is strong evidence from urban development research, including the council's own research for State of the City[7], that the presence of persistent poverty and social inequality has profound negative consequences for the long term success of the entire city. Directly addressing the issue not only can have positive outcomes for those families directly affected but contributes to sustainable urban competitiveness. The bottom line is: Belfast cannot be competitive if a large percentage of its population live in poverty.

There are other strong arguments for our role. It would:

1. Align the council to the emerging regional and national policies including OFMDFM's *Lifetime Opportunities* and Child Poverty strategies.
2. Encourage opportunities for economies of scale and integrated place-based approaches that do more for less.
3. Reduce the cost to the council and the wider economy. (Recent research estimates that child poverty costs £25 billion each year in costs to the Exchequer and reduced GDP[8].)
4. Raise the council's profile as a key citywide local service provider that supports communities across the city.
5. Support people to deal with the legacies of the conflict.

[7] 'Belfast: Competitive City?', Michael Parkinson (2008)
[8] This research from the Joseph Rowntree Foundation found that child poverty represents 71% of Social Services' spend across the UK.

4. Action plan 2012 to 2017

The action plan outlines specific interventions that the council can take over the next five years to address poverty and inequalities broadly arranged under the existing corporate themes. In a period of budget constraints the plan emphasises the role that existing work can play. Accordingly, many of the actions below identify opportunities to harness the potential of existing initiatives and ongoing strands of core council work. (There are a small number of new initiatives which are identified in the table.) Most actions have attached budgets and or staff time needed. Also, we have identified existing or potential income for various actions in the plan below.

#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
	Contributing to Better opportunities for success						
1	**Raising skills and reducing worklessness**	- Complete the HARTE programme - Maximise opportunities through Titanic Quarter partnerships including: - At least 25% of those recruited by Titanic Belfast from long-term unemployed - Extension of apprenticeships and graduate recruitment to other companies in TQ - Identify joint initiatives with Belfast Employment and Skills Board to address employment challenges of target groups - Supporting skills programmes through our community centres - Support Stepping Stone - Support Learn 2 Earn programme - Support Jobs on the Move	Development	DEL, Invest NI	1,2,3,4,5	£134,000 (3y) 1 full time secondment 1 full time secondment 1 full time secondment £428,076 (£7,636 BCC) £202,443 (£5,000 BCC) - £784,000 (£25,000 BCC)	£325,999 (3y)
2	**Actively support development of social economy projects**	- Provide advice and guidance to social economy enterprises that wish to apply for council tenders - Continue delivery of 'Meet the Buyer' events - Set up a social economy enterprise database - Assign a dedicated member of staff as first point of council contact for social enterprises	Development & Property and Projects		2,3,4,5	£15,000 per programme; 1 day a week officer time	£7,000 (ERDF) and £1,000 (participants)

#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
3	**Develop community tourism enterprises**[9]	- Evaluate the current tourism infrastructure along the relevant tourism corridors (as part of the Integrated Tourism Framework) - Engage the communities in relevant areas to raise awareness and potentials of social economy enterprises - Arrange necessary training and advice provision - Contribute to setting up at least one social economy enterprise per tourism hub	Development	NITB	2,3,4,5	£360,000	
4	**Ensure full inclusion of marginalised people through the council's employment programmes**	- Under the Young people's Employment Initiative programme secure up to 10 placements in the council each year for the long term unemployed	Finance and resources	DEL	1,2,3	App. 5 days a week (2 officers spending	£126,000 (ESF)
5	**Through Disability Framework ensure people with disability have full access to employment opportunities** new	- Provide at least 30 work experience placements for people with disabilities - Evaluate success of placements - Continue engagement with Government's new Workable programme - Continue monitoring reasonable adjustments for disabled applicants and our employees with disabilities	Disability Action Group - HR		1,2,3,4,5	£138,346 App. 5 days a week (2 officers spending 50% of their time)	£32,690 (Disability Action)
6	**Provide support to older people who seek employment opportunities** new	- Monitor and enhance volunteering opportunities for older people	HES/Community Services		1,2,3,4,5	1 day a week	£25,000 (EU funding for volunteer exchange)

[9] The Belfast Integrated Strategic Tourism Framework was launched in March 2011. One of the key themes within the framework is to develop local tourism destinations to extend the tourism offer outside the city centre, spread the benefits of tourism and in general lift the standard of visitor experience across the city. The local destinations identified are based on their potential to add to the Belfast tourism offer. They are: Belfast Hills, Connswater Community Greenway, Cathedral Quarter, Gaeltacht Quarter, Lagan Corridor, Lisburn Road, North Belfast Cultural Corridor, Queen's Quarter, Shankill Quarter and Titanic Quarter

#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
	Contributing to Better care for Belfast's environment						
7	**Assist in development of a regional food scheme to provide people in poverty with healthy food**	- Assess the extent of possible support and prepare a business case - Disseminate information about the project and processes internally and externally - Commence project delivery (if feasible)	HES/ Dev PBDU support	CHNI	1,2,3	Staff time – 1 day a month	
8	**Reducing fuel poverty**	- Investigating the possibility of piloting a 'Warm Zones' approach in two socially deprived areas of the city to demonstrate a proof of concept of reducing fuel poverty and carbon emissions - Explore funding opportunities for delivery of new energy efficiency powers	HES/Dev PBDU support		1,2,3	Not establish ed yet	
9	**Continue fuel stamp initiative and aim to promote it to all households in need**	- Ensure that the most vulnerable have access to the scheme - Mainstream the fuel stamp initiative with existing internal resources	HES		2,3	40,000 per year and 1 full time officer	
	Contributing to better support for people and communities						
10	**Ensure maximum delivery of Neighbourhoo d Renewal programme commitments**	- Continue coordination and monitoring of the council's delivery of across twelve Neighbourhood Renewal areas.	Development	Various	2,3,4	£60,000 per year plus 2 officers dedicatin g ½ to this action	
11	**Increase access to cultural development and outreach initiatives across the city (via the emerging Integrated Cultural strategy)**	- Extend the pilot outreach programme to children and young people - Through Creative Legacies funding increase access to Section 75 categories and other marginalised groups - Through City of Festivals project remove barriers to access of marginalised groups	Development	DCAL	2,3	165,000/ 5 hours per week £73,600 and 5 hours per week	- £300,000 (Peace III) £300,000 (Peace III) - £73,600 (DCAL)

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#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
		- Extend the development and outreach of our culture and arts programmes (via community festivals fund) -					
12	**Develop community gardens in the areas of need**	- Evaluate the scheme of four delivered projects - Develop new initiatives	Parks and Leisure	PHA	1,2,3,4	£58,000 (1Y)	£42,000 (Public Health Agency)
13	**Support & fund advice provision infrastructure in Belfast**	- Continue providing over £800,000 in funding - Ensure capacity building support to Advice consortia - Maximise the uptake of the Rate relief (especially by older people) - Support extended outreach activity of the advice providers	Development	DSD	1,2,3,4,5	£350,000 per year £12,500 2,000	£450,000(DSD) per year
14	**Community Support Development Programme with our partners**	- Develop Active Communities programme across the city - Delivery by a community network (Belfast Community Sports Development Network)	Parks and Leisure	Sport NI	1,2,3,4,5	3 days per week	£2.28 million (Sport NI)
15	**Develop capacity building through Community Development Framework**	- Confirm and implement the council's community development strategy to support core community capacity at the neighbourhood level - Actively engaging people in poverty around the interface areas to create conditions for removing peace walls	Development, All		1,2,3,4,5	£45,000 and ½ day a week officer time	

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Contributing to Better Services

16	**Explore feasibility of a 'Belfast Pass'[10] at a reduced rate for people on low incomesnew**	- Undertake a feasibility study and prepare a business case - If feasible deliver the new concept	Development	NITB, BVCB	2,3	£12,000 (50% NITB) - budget for reduced rate not established yet	£11,700 (from sales)

[10] The 'Belfast Pass' card is a simple concept based on the platform of free public transport (Metro/Ulsterbus and rail) with the added bonus of 90 discounts and offers in attractions, tours, restaurants, shops and activities.

#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
17	**In partnership with the Public Health Agency provide free access to leisure facilities in the most deprived parts of Belfast**	- Target up to 200 people who live in the most deprived areas. (There are currently 110 people participating)	Parks and Leisure	PHA	1	½ a week for one officer (6 months)	£13,200 (Public Health Agency)
18	**Ensure all children have access to parks and playgrounds**	- Map the provision of parks and playgrounds across Belfast	SNAP unit to support P&L		1,2	Staff time – 1 day a month	
	Contributing to Better Value for Money						
19	**Explore development of 'social clauses' in our procurement, project and regeneration spend** new	- Set up of the inter-agency Social Clause Delivery Forum - When legislative powers are passed to councils: - Set up a Task and Finish team - Undertake a feasibility study - Prepare a business case for the council - If successful roll-out across the council	Properties and Projects (PBDU to support research)		1,2,3,4,5	No budget assigned yet – 1 full time secondment	
20	**Develop indicators to measure the impact of regeneration on health and poverty in Belfast**	- Pilot the indicators and methodology - Identify target audience and provide training on the use of the tool	HES		1,2,3	3 days a week	£40,000 (Urbact)
21	**Ensure a maximum social impact of our regeneration projects** new	- Explore the potential of setting up GEMS for North Foreshore, Titanic and Northern Fringe at Gasworks - Develop evaluation and monitoring system that measures social impact - Link it to the indicators on the regeneration impact	Development		1,2	Budget not defined yet; ½ day a week officer time	
22	**Regularly monitor, report, evaluate and improve the**	- Undertake a study of available performance indicators - Prepare a performance Framework	Development		1,2,3,4,5	£ 20,000; 1 day a month officer time	

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<#>Undertake evaluation of the pilot project¶

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#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
	Framework	- Monitor Framework on an annual basis					
	Contributing to City Leadership						
23	**Fully integrate the equality framework into corporate planning** new	- Undertake an audit of inequalities in the council - Prepare improvement plans	Good Relations unit		1,2	None – 1 day a week staff time	
24	**Ensure current poverty & inequalities data on CityStats** new	- Include poverty & inequalities related indicators in area profiles - Share profiles with external partners - Use the information to influence decision making - Annual inequalities briefing for Members (including impact of the framework, issues to be addressed, statistics, etc.)	Development		1,2,3,4,5	Staff time – 1 day a month	
25	**Maximise investment and funding streams to support council work on poverty & inequalities** new	- Through the Eurocities Social Affairs Forum explore the funding opportunities for the council - Actively engage in the post 2013 lobby for future structural funds - Explore for the opportunities under the new Eurocities Lifelong Learning Working Group - Complete (and undertake) two sports bids to tackle violence in sports and better use parks - Continue influencing at a European level for funding streams to tackle inequalities - Explore alternative finance arrangement for people in poverty with our partners (e.g. microfinance)	Development		1,2,3,4,5	Attendance at 3 Fora meetings Input into 2 consultation/lobby responses - 3 days research, 4 days meetings - 1 day/month, 7 days preparation and 2 inward visits - Research 3 days, 3 meetings	€400,000 (£342,325) secured Potential to secure up to €500,000 (£427,871)

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#	Action	Detail	Lead	Partners	Years delivered	Budget/ time	Income
26	**Exchange best practise with European and national partners**	- Engage with partners at events, seminars and meetings - Continue engagement in the Eurocities Task Force on Roma and the I am Roma project through the Belfast Health Trust - Continue participation in Belfast in Europe group and contribute to joint projects - Commemorate the EU Year of Active Ageing and Solidarity between the generations - Use the relevant best practise examples in the poverty Framework delivery - Undertake one lead project at a European level	Development & Health and Environmental Services		1,2,3,4,5	3 meetings per year, input into 2 consultation responses 3 meetings per year 4 meetings per year 5 days research and development Under PROGRESS – difficult to estimate time	Travel and accommodation reimbursed through PROGRESS
27	**Undertake supporting research with external partners**	- Contribute to, and support, research on inequalities and overcoming barriers to participation	Development		1	£20,000/ 1 day a month	
28	**Develop partnerships and build political legacy**	- Contribute to development of NI Child Poverty Framework - Identify appropriate issues for structured and active lobbying of Government - Build partnerships to deliver different projects	Chief Executive's		1,2,3,4	1 day/month	

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5. How will we measure our impact?

The council places greater emphasis on creating effective performance management systems that allow us to better to measure the impact of our services across the city. This framework will utilise the approaches and data gathering techniques emerging from these systems to assist with measuring the impact on poverty in the city.

What we measure, and how it will be measured, are influenced by a number of factors:

- the measurable reality of poverty in Belfast
- the many inter-connected factors that contribute to it
- the particular subset of these factors on which the council can have a positive impact
- the strands of council work which can contribute to this impact

Bearing this in mind we are developing indicators with the following characteristics:

- ability to identify levels of poverty at a small area level
- their relevance to our corporate themes
- direct, unambiguous measures of progress
- available across different socioeconomic groups, geographies and over time
- have a direct link with interventions
- consistent with the decision-making cycle
- easy and inexpensive to collate
- understandable
- politically agreed

(The council is developing a Quality of Life matrix which will include a set of indicators to measure the economic, social and environmental impact of council's policies and projects. There will be an obvious overlap between the matrix's indicator sets and those of the poverty framework and it will be important that results and processes are shared.)

We have identified a basket of indicators classified under the following headings:

1. **Low income & employment**
2. **Children and young people**
3. **Communities**
4. **Adult wellbeing**

Details of each indicator are available upon request or via the council's **Citystats system**.

Internal indicators

There are a number of internal indicators which while not directly measuring the impact of our work on poverty, will contribute to the direct measurement of the performance of the action plans' various initiatives. These include:

Corporate theme	Proposed Performance indicator	Frequency
City leadership	• Total amount of leveraged money targeted at social inclusion projects	Quarterly
Better opportunities for success across the city	• Number of young people long-term unemployed who went through	Annually

	council's programmes (HR) • Percentage of jobs through regeneration projects that are given to local people • Number of set up social economy enterprises	
Better care for Belfast's environment	• Percentage of all housing stock in fuel poverty • The number of people through environmental projects (food scheme, community gardens)	Annually
Better support for people and communities	• Total amount of claw-back benefits drawn by the advice services • Percentage of people who feel the council's work helps them play a bigger role in decision-making	Quarterly Annually
Better services	• Percentage of people satisfied with council's services	Biennially
Better value for money	• Percentage of the council's contracts with at least 5% of spend towards social clause	Annually

The monitoring process will involve a longitudinal assessment of poverty:

- Agreeing indicators to measure progress
- Setting targets to provide benchmarks
- Identifying a system(s) to house the data.
- Regular collation, analysis, review and response in relation to the future indicator data.

6. What happens next?

This is a draft document that needs input from all our stakeholders – the more people and organisations we engage the more meaningful and effective this framework will be. Thus we are planning a series of phases before we launch the final document:

- Public consultation December – February 2012
- Feedback analysis and redrafting of the document in February
- Final strategy to go through council internal decision making processes in March
- Final framework to the committee in April
- The implementation to commence April/May 2012
- Development of a detailed action plan
- Process of incorporating it into units' business plans

Appendix: Who have we engaged with to date?

We have discussions with a large number of stakeholders about the framework and the types of work that the council could usefully contribute. To date, while acknowledging the limited role of the council, there has been an overwhelming positive response to the creation of the framework.

Internally, officers have been keen to investigate how their work can contribute to delivering the framework while externally there has been enthusiastic support for the council in taking a proactive stance in pursuing this work.

Internal council stakeholders

- Members
- Health and Wellbeing group
- Chief Officers Management Team
- Policy Officers Group
- Departmental managers
- Heads of Service
- Various officers

External stakeholders

- Age NI (Provided advice)
- Barnardos (Facilitated eight research events with young people who are affected by poverty or disability)
- Equality Commission (Provided advice)
- Joseph Rowntree Foundation
- NICVA (provided advice)
- Northern Ireland Anti-Poverty Network (Facilitated six research events with people affected across the city)
- OFMDFM (Provided direction)
- Save the Children (Provided advice)
- Council for Homeless Northern Ireland
- Women Support Network (Facilitated six research events with women in poverty)

Development Committee

(As of August 2011)

Alderman Christopher Stalford (Chairman)
Councillor Conor Maskey (Deputy Chair)

Alderman May Campbell
Alderman Tom Ekin
Alderman William Humphrey
Alderman Bob Stoker
Councillor Janice Austin
Councillor Tom Hartley
Councillor Máire Hendron
Councillor Colin Keenan
Councillor Bernie Kelly
Councillor John Kyle
Councillor Lee Reynolds
Councillor Nichola Mallon
Councillor Jim McVeigh
Councillor Caoimhín Mac Giolla Mhín
Councillor Máirtín Ó Muilleoir
Councillor Gavin Robinson
Councillor Guy Spence
Councillor Andrew Webb

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 Agenda Item 4a

Report to:	Development Committee
Subject:	Future Renewing the Routes Programme 2011-2016
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	**Relevant Background Information**
1.1	In April 2011 a three-year prioritisation plan, identifying proposed target areas, was presented to the Development Committee. The suggested prioritisation was based on empirical data and a previously agreed methodology. Whilst the Committee resolved to support the first year proposals (Antrim Road 2, Sandy Row, Castlereagh Road 1 and the Grosvenor and Springfield Road 1) it was agreed that alongside this project development activity further work should be carried out on the longer term potential for the programme.
1.2	This review work was to focus on the proposed prioritisation and the potential for the identification of neighbourhood or local regeneration areas beyond the current arterial routes. Following Committee consideration and agreement of the broad parameters for the programme, set out below, it is proposed that a further report will be brought back to Committee to seek endorsement of a longer term arterial route programme.
1.3	This report seeks to update Members on progress in respect of the ongoing arterial routes programme prioritisation; outline the potential for the identification of neighbourhood areas for targeted regeneration activity; and secure delegated authority for the procurement of the necessary contracts to implement the works agreed by Committee for the existing approved arterial routes.

2	**Key Issues**
2.1	<u>Arterial routes</u> The previous deliberation highlighted that the reviewed data and assessment results needed to be more clearly presented to allow effective consideration.

	The objective is to present the findings in a more straightforward way and provide for a clearer outline of a potential long-term programme approach. With this in mind the assessment of the arterial routes survey/review results are now presented using a colour coded notation, similar to that used in other reports, adopting a RAG (Red, Amber, Green) approach to highlight the findings (Appendix 1).
2.2	The arterial routes assessment in Appendix 1 presents the identified areas in each of the City quadrants (north, south, east, and west) from the initial empirical analysis. Resource limitations and capacity will necessitate phasing decisions and prioritisation in respect of the areas to target and the timing of regeneration activity.
2.3	From this review of all the arterial routes nodes it was possible to generate the initial prioritisation chart for all the nodes (Appendix 2). The chart illustrates the potential short (20%), medium (40%) and longer term (40%) node priorities across the different quadrants of the City, excluding the current target areas. This initial prioritisation is based purely on the more empirical area and survey data. The proposal would be to carry out a further assessment of the short and medium priority areas identified from this initial assessment, to determine where the programme could have the greatest potential impact. The results of this further assessment would then be brought back to Committee to seek endorsement for a prioritised planned programme.
2.4	The proposed final prioritisation process will incorporate the strategic influences that would supplement the empirical data that formed the basis of the first stage reassessment, illustrated in the prioritisation chart, and could involve shifting areas between the medium to short term categories and provide for a four year programme that would facilitate a city wide approach.
2.5	This strategic assessment would again include a simple scoring framework in respect of the different nodes to reflect:- - potential alignment of any proposed Renewing the Routes activity with existing regeneration proposals; - whether or not the defined area represents a natural neighbourhood or community focus; - the extent to which an area has previously benefited from assistance; and - the potential for the Renewing the Routes type of local regeneration activity and resources to make an impact within the specific area.
2.6	This proposed approach would be to target resources over a four year period for the next phase of the Renewing the Routes. This would be based on four broad parameters for the proposed programme, reflecting potential resource availability and capacity, which would also inform the prioritisation assessment: 1. the arterial routes programme in each financial year would target two new areas (over a four-year period) with each area allocated £150,000 of project resources; 2. to facilitate a city wide approach the programme would be developed and prioritised with areas being identified on a north/south/east/west basis; 3. the programme focus would be on the short to medium node priorities arising from the assessment, with any changes (between short and medium priority) based on the strategic assessment using the parameters set out above (para 2.5); and

	4. the programme would be reviewed during year three to ensure Committee would have the opportunity to consider programme extension, modification or termination as a planned approach.
2.7	It is therefore suggested that the Committee endorses the initial prioritisation; agrees the basis for the further prioritisation based on the strategic assessment; and endorse broad parameters for a proposed Renewing the Routes programme.
2.8	<u>Neighbourhood areas</u> Committee, during the consideration of the extension to the current Renewing the Routes activity, requested that the Team explore the potential for a similar local regeneration approach outside of the defined arterial routes. The suggested focus was on potential target areas within neighbourhoods or communities but beyond the current scope of the existing arterial routes programme.
2.9	The initial identification of potential local or neighbourhood areas has been carried out by the Team. The initial survey work confirmed that the potential existed for the identification of a variety of areas across the city (Appendix 3). The locations identified are based on initial survey activity informed by the Committee guidance, and any appropriate, statutory designations.
2.10	In considering the scope for progression in this area of work it is important that any activity is presented in the context of the development of Council's overall place-shaping agenda; development of a city resourcing plan and discussion on local or neighbourhood funds. With this in mind it would be the intention to include this work as part of this wider agenda and report back to Committee once these issues have been programmed corporately.
2.11	The Committee is therefore requested to note the information provided in respect of the identified neighbourhood areas and consider potential for additions or omissions that would inform the continued work on this ongoing area of activity.
2.12	<u>Delegated Authority</u> The Renewing the Routes team will work in liaison with the Project Management Unit of the Property and Projects Department who will manage the procurement of necessary construction related design services and measured term contracts for the carrying out of the works across all the areas and the subsequent administration of the contracts.
2.13	Committee is therefore requested to approve the invitation of tenders for construction related design services and measured term contracts for the carrying out of the works across all the areas identified and the award of contracts to those firms submitting the tenders which are evaluated as being the most economically advantageous in terms of quality and cost criteria, all in accordance with BCC procurement guidelines

3	**Equality and Good Relations Considerations**
	There are no Equality and Good Relations considerations attached to this report.

4	**Recommendations**
4.1	It is recommended that Members: 1. Note the initial prioritisation set out in the prioritisation chart (Appendix 2); 2. Agree the further prioritisation based on the strategic assessment detailed in paragraph 2.5; 3. Endorse the parameters for a proposed Renewing the Routes programme; 4. Note and if appropriate modified through addition or removal the neighbourhood areas identified in the initial assessment and set out in Appendix 3; and 5. Approve the invitation of tenders for construction related design services and measured term contracts for the carrying out of the works across all the areas identified and the award of contracts to those firms submitting the tenders which are evaluated as being the most economically advantageous in terms of quality and cost criteria, all in accordance with BCC procurement guidelines.

5	**Decision Tracking**
Subject to approval the final prioritisation results will be brought back to Committee for consideration in January 2012. Timeframe: January 2012 Reporting Officer: Shirley McCay	

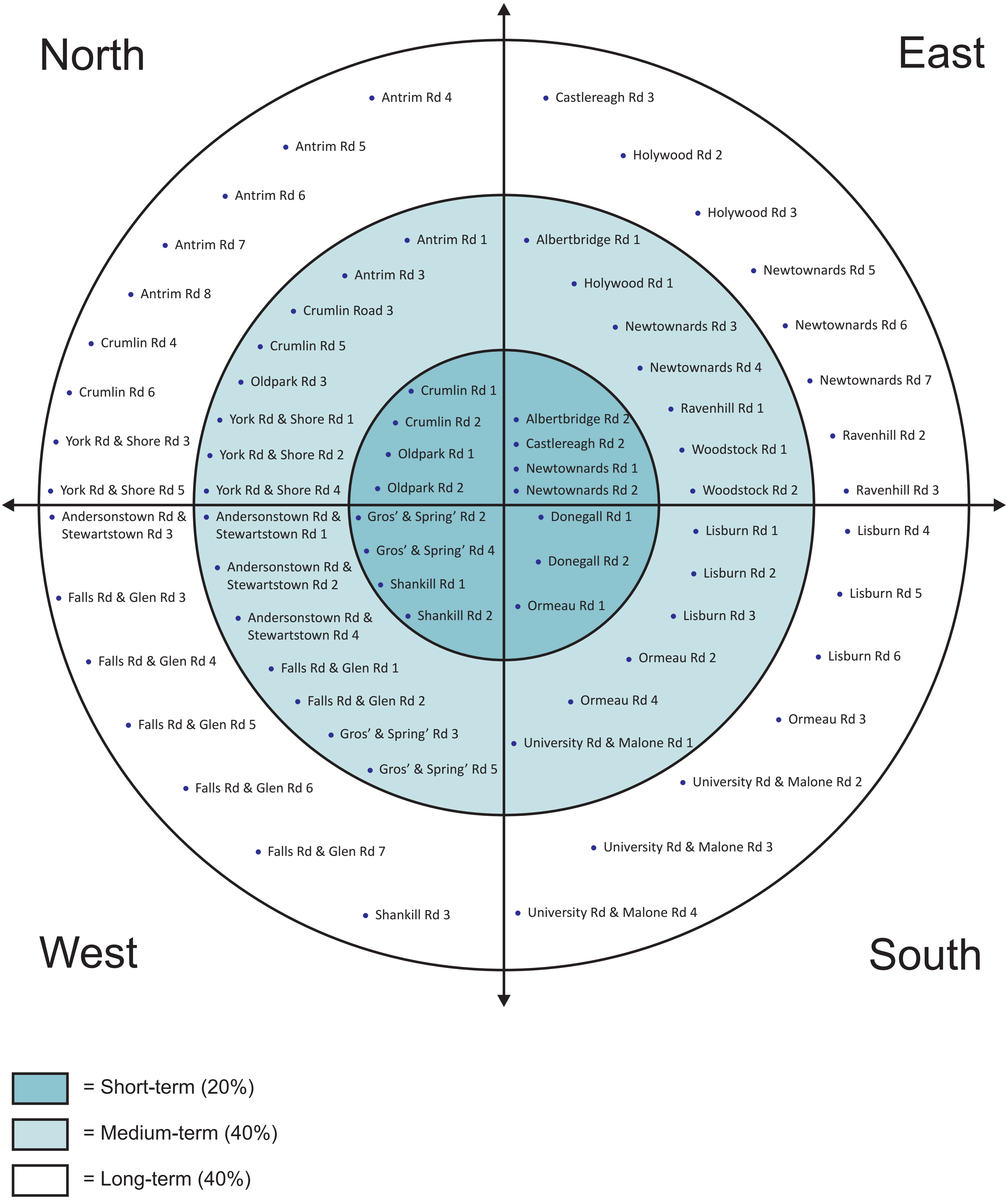
6	**Key to Abbreviations**
RAG – Red, Amber and Green Status report	

7	**Documents Attached**
Appendix 1 – Arterial routes survey and review results Appendix 2 – Arterial routes Prioritisation Chart Appendix 3 – Initial identification of Neighbourhood Areas Appendix 4 – Background information	

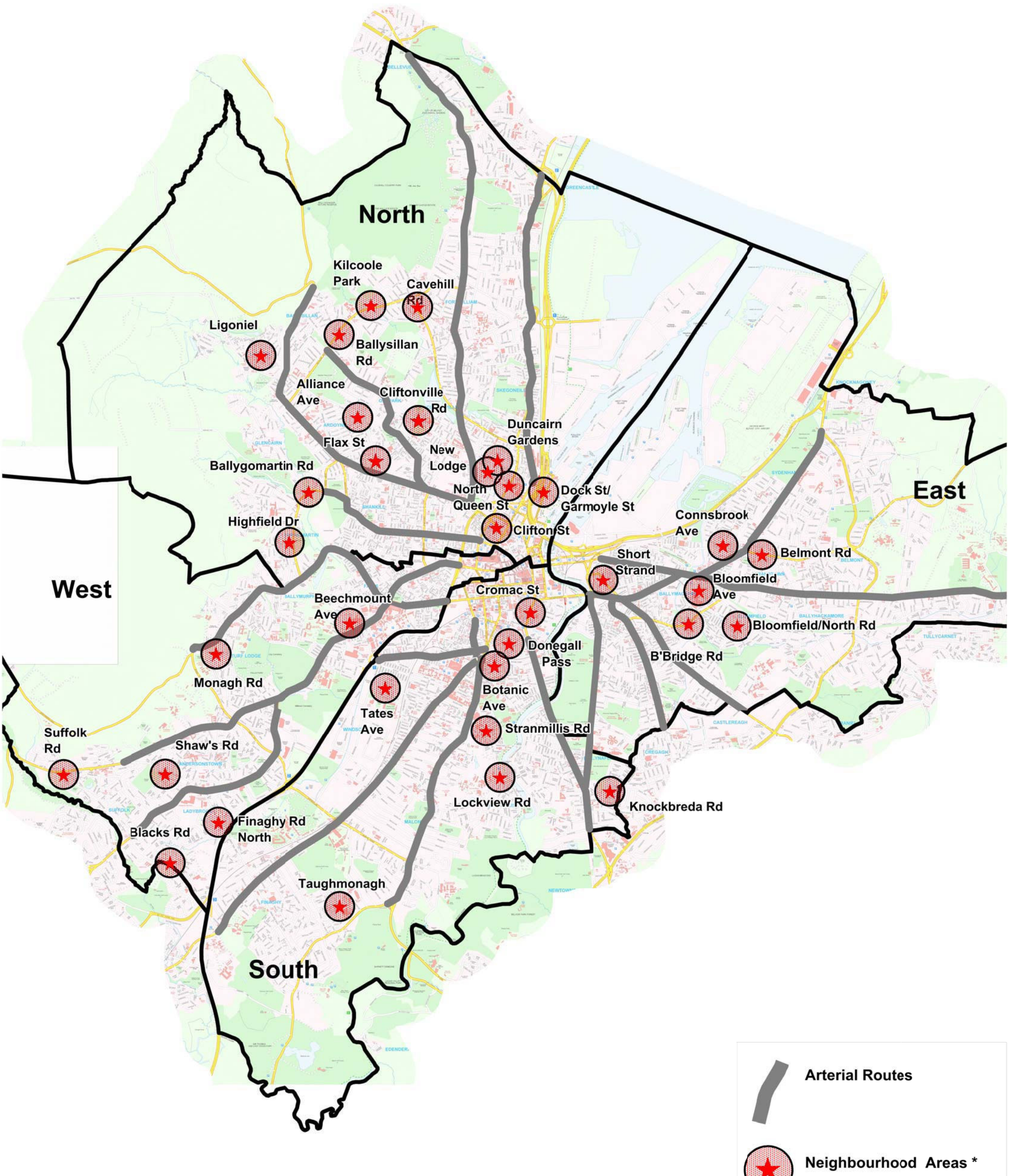
Appendix 1 - Arterial Route assessment

Node	Abbrev.	Quad.	Land status	Occupancy rates	Building condition	Commercial condition	Social deprivation	Economic deprivation
Albertbridge Rd 1	Alb1	East						
Albertbridge Rd 2	Alb2	East						
Castlereagh Rd 1	Cas1	East						
Castlereagh Rd 2	Cas2	East						
Castlereagh Rd 3	Cas3	East						
Holywood Rd 1	Hol1	East						
Holywood Rd 2	Hol2	East						
Holywood Rd 3	Hol3	East						
Newtownards Rd 1	New1	East						
Newtownards Rd 2	New2	East						
Newtownards Rd 3	New3	East						
Newtownards Rd 4	New4	East						
Newtownards Rd 5	New5	East						
Newtownards Rd 6	New6	East						
Newtownards Rd 7	New7	East						
Ravenhill Rd 1	Rav1	East						
Ravenhill Rd 2	Rav2	East						
Ravenhill Rd 3	Rav3	East						
Woodstock Rd 1	Woo1	East						
Woodstock Rd 2	Woo2	East						
Antrim Rd 1	Ant1	North						
Antrim Rd 2	Ant2	North						
Antrim Rd 3	Ant3	North						
Antrim Rd 4	Ant4	North						
Antrim Rd 5	Ant5	North						
Antrim Rd 6	Ant6	North						
Antrim Rd 7	Ant7	North						
Antrim Rd 8	Ant8	North						
Crumlin Rd 1	Cru1	North						
Crumlin Rd 2	Cru2	North						
Crumlin Rd 3	Cru3	North						
Crumlin Rd 4	Cru4	North						
Crumlin Rd 5	Cru5	North						
Crumlin Rd 6	Cru6	North						
Oldpark Rd 1	Old1	North						
Oldpark Rd 2	Old2	North						
Oldpark Rd 3	Old3	North						
York & Shore Rd 1	Yor1	North						
York & Shore Rd 2	Yor2	North						
York & Shore Rd 3	Yor3	North						
York & Shore Rd 4	Yor4	North						
York & Shore Rd 5	Yor5	North						
Donegall Rd 1	Don1	South						
Donegall Rd 2	Don2	South						
Lisburn Rd 1	Lis1	South						
Lisburn Rd 2	Lis2	South						
Lisburn Rd 3	Lis3	South						
Lisburn Rd 4	Lis4	South						
Lisburn Rd 5	Lis5	South						
Lisburn Rd 6	Lis6	South						
Ormeau Rd 1	Orm1	South						
Ormeau Rd 2	Orm2	South						
Ormeau Rd 3	Orm3	South						
Ormeau Rd 4	Orm4	South						
Sandy Row 1	San1	South						
Uni' & Malone Rd 1	Uni1	South						
Uni' & Malone Rd 2	Uni2	South						
Uni' & Malone Rd 3	Uni3	South						
Uni' & Malone Rd 4	Uni4	South						
And' & Stewarts' Rd 1	And1	West						
And' & Stewarts' Rd 2	And2	West						
And' & Stewarts' Rd 3	And3	West						
And' & Stewarts' Rd 4	And4	West						
Falls & Glen Rd 1	Fal1	West						
Falls & Glen Rd 2	Fal2	West						
Falls & Glen Rd 3	Fal3	West						
Falls & Glen Rd 4	Fal4	West						
Falls & Glen Rd 5	Fal5	West						
Falls & Glen Rd 6	Fal6	West						
Falls & Glen Rd 7	Fal7	West						
Gros' & Spring' Rd 1	Gro1	West						
Gros' & Spring' Rd 2	Gro2	West						
Gros' & Spring' Rd 3	Gro3	West						
Gros' & Spring' Rd 4	Gro4	West						
Gros' & Spring' Rd 5	Gro5	West						
Shankill Rd 1	Sha1	West						
Shankill Rd 2	Sha2	West						
Shankill Rd 3	Sha3	West						

Appendix 2: Arterial Route Prioritisation chart



Appendix 3: Initial Identification of Neighbourhood Areas



Appendix 4 : Background Information
Arterial Routes Assessment & Node Explanation

ROAD	NODE AREA NUMBER	STARTING POINT (STREET)	ENDING POINT (STREET)
SOUTH BELFAST			
Ormeau Rd	1	Donegall Pass	Stranmillis Embankment
Ormeau Rd	2	Stranmillis Embankment	Haywood Avenue
Ormeau Rd	3	Haywood Avenue	Roundabout at Ormeau Rd/ Ravenhill Rd Junction
Ormeau Rd	4	Roundabout at Ormeau Rd/ Ravenhill Rd Junction	Junction at Hampton Park
Donegall Rd	1	Bradbury Place	Donegall Road Bridge
Donegall Rd	2	Donegall Road Bridge	Glenmachan Street
Ravenhill Rd	1	Junction at Albertbridge Road	Ormeau Embankment
Ravenhill Rd	2	Ormeau Embankment	Junction at Ravenhill Park/Park Road
Ravenhill Rd	3	Junction at Ravenhill Park/Park Road	Roundabout of Ravenhill Rd & Ormeau Rd
University St & Malone Rd	1	Junction at Bradbury Place	Junction at San Souci Park
University St & Malone Rd	2	Junction at San Souci Park	Junction at Stranmillis Road
University St & Malone Rd	3	Junction at Stranmillis Road	Junction at Balmoral Avenue
University St & Malone Rd	4	Junction at Balmoral Avenue	Roundabout at House of Sport
Lisburn Rd	1	Junction of Bradbury Place	Junction at Tate's Avenue
Lisburn Rd	2	Junction at Tate's Avenue	Junction at Marlborough Park
Lisburn Rd	3	Junction at Marlborough Park	Junction at Stockman's Lane
Lisburn Rd	4	Junction at Stockman's Lane	Junction at Priory Park
Lisburn Rd	5	Junction at Priory Park	Junction at Orpen Park
Lisburn Rd	6	Junction at Orpen Park	Junction at Black’s Road and Kingsway
NORTH BELFAST			
Antrim Rd	1	Carlisle Circus	New Lodge Road
Antrim Rd	2	New Lodge Road	Oceanic Avenue
Antrim Rd	3	Oceanic Avenue	Glandore Avenue
Antrim Rd	4	Glandore Avenue	Chichester Road
Antrim Rd	5	Chichester Road	Downview Park
Antrim Rd	6	Downview Park	Glencoe Park
Antrim Rd	7	Glencoe Park	Hazelwood Park
Antrim Rd	8	Hazelwood Park	Bellevue
Crumlin Rd	1	Carlisle Circus	Clifton Park Avenue
Crumlin Rd	2	Clifton Park Avenue	Cambrai Street
Crumlin Rd	3	Cambrai Street	Hesketh Road
Crumlin Rd	4	Hesketh Road	Ballysillan Road
Crumlin Rd	5	Ballysillan Road	Braehill Road
Crumlin Rd	6	Braehill Road	Loughview Close
York Rd / Shore Rd	1	Brougham Street	North Queen Street
York Rd / Shore Rd	2	North Queen Street	York Park
York Rd / Shore Rd	3	York Park	Lowwood Park
York Rd / Shore Rd	4	Lowwood Park	Shore Crescent Estate
York Rd / Shore Rd	5	Shore Crescent Estate	M2 (Greencastle) Intersection
Oldpark Rd	1	Crumlin Road	Torrens Avenue
Oldpark Rd	2	Torrens Avenue	Cliftonville Crescent
Oldpark Rd	3	Cliftonville Crescent	Ballysillan Road

ROAD	NODE AREA NUMBER	STARTING POINT (STREET)	ENDING POINT (STREET)
EAST BELFAST			
Albertbridge Rd	1	Albertbridge/Short Strand	Templemore Avenue
Albertbridge Rd	2	Templemore Avenue	Newtownards Road
Holywood Rd	1	Junction of Upper Newtownards Road	Junction at Belmont Road
Holywood Rd	2	Junction at Belmont Road	Junction at Inverary Avenue
Holywood Rd	3	Junction at Inverary Avenue	Parkway Junction
Woodstock Rd	1	Junction on Albertbridge Road	Junction at Tildary Street
Woodstock Rd	2	Junction at Tildary Street	Roundabout at Ladas Drive
Castlereagh Rd	1	Junction on Albertbridge Road	Junction at Beersbridge Road
Castlereagh Rd	2	Junction at Beersbridge Road	Junction at Grand Parade/Ladas Drive
Castlereagh Rd	3	Junction at Grade Parade/Ladas Drive	Knock Road Junction
Newtownards Rd	1	Bridge End	Witham Street
Newtownards Rd	2	Witham Street	Beersbridge Road
Newtownards Rd	3	Beersbridge Road	Earlswood Road
Newtownards Rd	4	Earlswood Road	Hawthornden Road
Newtownards Rd	5	Hawthornden Road	Stormont Hotel
Newtownards Rd	6	Stormont Hotel	Stoney Road
Newtownards Rd	7	Stoney Road	Comber Road
WEST BELFAST			
Grosvenor Rd / Springfield Rd	1	Westlink	Falls Road
Grosvenor Rd / Springfield Rd	2	Falls Road	Lanark Way
Grosvenor Rd / Springfield Rd	3	Lanark Way	West Circular Roundabout
Grosvenor Rd / Springfield Rd	4	West Circular Roundabout	Divismore Crescent
Grosvenor Rd / Springfield Rd	5	Divismore Crescent	Monagh Bypass
Falls Rd / Glen Rd	1	Divis Street	Conway Street
Falls Rd / Glen Rd	2	Conway Street	Broadway
Falls Rd / Glen Rd	3	Broadway	Whiterock Road
Falls Rd / Glen Rd	4	Whiterock Road	Miltown
Falls Rd / Glen Rd	5	Miltown	Kennedy Way
Falls Rd / Glen Rd	6	Kennedy Way	Ramoan Gardens
Falls Rd / Glen Rd	7	Ramoan Gardens	Shaws Road
Andersonstown Rd / Stewartstown Rd	1	Falls Road junction	Kennedy Way
Andersonstown Rd / Stewartstown Rd	2	Kennedy Way	Avoca Complex
Andersonstown Rd / Stewartstown Rd	3	Avoca Complex	Hilhead Crescent
Andersonstown Rd / Stewartstown Rd	4	Hillhead Crescent	Blacks Road
Shankill Rd	1	Peters Hill	Agnes Street
Shankill Rd	2	Agnes Street	Cambrai Street
Shankill Rd	3	Cambrai Street	Twaddell Avenue (Woodvale Road & Ballygomartin Road)

Appendix 4 : Background Information Descriptions

Domains	Associated variables	Range			
		Low	Definition	High	Definition
Land status	Derelict, occupied	0	No vacant land	∞	All units of land unoccupied
Occupancy rates	Derelict, vacant, part vacant, occupied	0	All buildings occupied	∞	All buildings derelict
Building condition	Building condition value	1	Very good appearance - clean and tidy. Contributes positively to local area.	4	Poor appearance - dirty or untidy. Covered in grime, mould. Detracts from overall appearance of the area.
Shopfront condition	Shopfront condition value	1	Very good appearance - clean and tidy. Contributes positively to local area.	4	Poor appearance - dirty or untidy. Covered in grime, mould. Detracts from overall appearance of the area.
Social	Population turnover, Income Support claimants, Incapacity Benefit claimants, Housing Benefit claimants, Crime & Disorder deprivation, ACORN	0	No population turnover, no Income Support claimants, no Incapacity Benefit claimants, no Housing Benefit claimants, no Crime & Disorder deprivation, no 'hard-pressed' households.	100	High population turnover, high proportion of Income Support claimants, high proportion of Incapacity Benefit claimants, high proportion of Housing Benefit claimants, significant Crime & Disorder deprivation, high proportion 'hard-pressed' households.
Economic	Income deprivation, Employment deprivation, change in businesses	0	No Income deprivation, no Employment deprivation, low turnover of businesses.	100	Significant Income deprivation, significant Employment deprivation, high turnover of businesses.

Agenda Item 4b

Belfast City Council

Report to:	Development Committee
Subject:	B-Team Update
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officer:	Shirley McCay, Head of Economic Initiatives, ext 3459

1.	**Relevant Background Information**
1.1	Belfast City Council is the Lead Partner in the ERDF funded INTERREG IVC project B-Team. The B-Team project brings together specialists in Brownfield regeneration from different countries to exchange knowledge contributing to improved developments and enhanced regional policies focussing on the resolution of practical challenges on case study sites in the partners' countries.
1.2	The B-Team partners include Dublin/Ireland, Sevilla/Spain, Oulu/Finland, Dresden/Germany, Ruda Slaska/Poland, County Council Hajdu-Bihar/Hungary, Torino/Italy and Vilnius/Lithuania.
1.3	The support and exchange of technical knowledge takes place during "Brownfield Days" events with the experience and practical approaches discussed and disseminated to a broader public at European Dissemination Events scheduled to take place at different stages during the life of the initiative. The dissemination events are also opportunities for the partners to "pledge" to change or address problems that are identified as hindering Brownfield regeneration. In these dissemination events the participation of elected representatives is a key element to ensure exchange of information and experience across all aspects of the partner organisations.
1.4	The work programme for the project has progressed from the previous updates provided to Committee with six Brownfield Days (Oulu, Torino, Ruda Slaska, Seville, Dresden and Vilnius) and three European Dissemination Events (Dresden, Hajdu-Bihar, Ruda Slaska) being completed and arrangements for the next stage of the programme has been agreed with the partners.

1.5	This report seeks to secure approval for the attendance of Members at the future European Dissemination Events which are scheduled to take place in April 2012 in Vilnius/Lithuania and in November 2012 in Seville/Spain. The report also seeks to inform Members of the proposed Brownfield Days in Belfast which will take place in September 2012. The detailed programme for the proposed activity will be brought back to Committee and the participation of Members would be welcomed.

2.	**Key Issues**
2.1	The European Dissemination Events are scheduled to take place in regular intervals during the three year lifespan of the project. The project partners have the opportunity to broaden the participation at these dissemination events to encourage a wider audience and the participation of elected representatives from each of the partner city authorities.
2.2	The dissemination event will seek to: – Progress the practical process for identifying viable solutions to common Brownfield challenges (case studies will be presented with experts from different regions developing solutions or alternative approaches); – Explore the potential to use new unconventional methods (more innovative approaches successful in other countries are assessed for broader application); – Encourage engagement within the partnership to explore the potential for shared learning; – Identify the potential for more effective use of resources - time, money, assets (through improved policy and approaches to Brownfield regeneration future development processes can become more effective and sustainable); and – Explore the potential for the development of Brownfield pledges for adoption by the partnership as a means to secure future improvements in policy and practice.
2.3	The European Dissemination Event in Vilnius (April 2012) will focus on the results of the B-Team project up to this stage with experience from Brownfield Days in Seville, Vilnius and Hajdu-Bihar. The European Dissemination Event in Sevilla will also mark the final event of the project. Elected representatives from all participating cities will participate in this event as well as representatives from the European Commission and other European bodies.
2.4	The Brownfield Days in Belfast will be carried out over four days in September. The findings of these four days will be presented to a broader audience at the last day of this event as well as at the final conference in Seville.

3.	**Resource Implications**
3.1	The provision for the participation at the dissemination event of operational staff along with political representation is contained within the agreed project plan. There are no fees for the event and the costs for travel and accommodation is estimated at £500 per person which will be covered by the project. There are no additional resource implications arising from the EU funded INTERREG IVC initiative.

4.	**Equality and Good Relations Considerations**
4.1	There are no Equality and Good Relations Considerations attached to this report.

5.	**Recommendations**
5.1	The Committee is asked to approve the attendance of the Chair and Deputy Chair or their nominees, at the European Dissemination Events in Vilnius and in Sevilla as an approved duty.

6.	**Decision Tracking**
There is no decision tracking attached to this report.	

7.	**Key to Abbreviations**
ERDF – European Regional Development Fund EDE – European Dissemination Event	

8.	**Documents Attached**
2nd B-Team newsletter	

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B-Teamnews

THE NEWSLETTER OF BTEAM PROJECT

#2 JULY-SEPTEMBER 2011

BROWNFIELD POLICY

Message

from the Project Manager

Sabine Kalke
Project Manager, B-TEAM
September 2011

In June 2011, the project has published and disseminated the first newsletter. As I have said, this is a step forward in disseminating relevant information to project partners as well as to the general public.

In the current issue, B-Teamnews highlights the events such as the Brownfield Days in Dresden, Germany and the European Dissemination Event in Ruda Slaska, Poland. We have also published the approved Brownfield Pledge of Oulu, Finland as well as the recent "Container Event" organised by the City. There is also an article from the academic partners and a special feature on the children's competition: Bewitch the Heap.

Finally, we would like to thank all project partners and individuals who contributed to this newsletter.


Dresden

hosted the 5th European Brownfield Days

The 5th Brownfield Days (BDs) were conducted in Dresden, Germany on 4-7 July 2011. Dresden City is situated in the south-eastern part of the Free State of Saxony, which borders not only on other German regions, but also on the Czech Republic and Poland. Dresden is the centre of the Upper Elbe Valley urban agglomeration that lies in a marked widening of the Elbe valley.

The focus of these Brownfield Days were to share and exchange partners' experiences in Brownfield redevelopment strategies and temporary uses.

Activities included the introduction to the urban development in Dresden and walking tour "Leipziger Vorstadt"- a guided visit to the identified Brownfield area and to selected locations with temporary uses; discussions on the approaches to Brownfield development strategies/theoretical framework, and series of workshops.

The highlights of the BD was the public event and stakeholders were engaged and discussed the results and conclusions of the activity with the partners. The focus of the event was on the alternative opportunities for the redevelopment of the Neustaedter Hafen / Leipziger Vorstadt area.

Ruda Slaska

European Dissemination Event held in Poland

The third European Dissemination Event (EDE) was held in Ruda Slaska, Poland on 5-6 September 2011. Ruda Slaska is a city in Silesia in southern Poland and part of Silesian Voivodeship.

The objective of the EDE was to disseminate the results of the B-Team project so far to a broader public.

The results and recommendations from the completed Brownfield Days in Ruda Slaska/ Poland and Dresden/ Germany, as well as the updates of the previously conducted Brownfield Days were presented and discussed with the audience.

There was considerable number of political leaders from partner cities wherein a Political Forum was conducted as part of the overall EDE programme. Resource speakers from local, regional and Europe level also presented their respective topics related to Brownfield regeneration.

Brownfield Pledge Oulu

The Brownfield Pledge is the concrete result of the project, particularly the conducted Brownfield Days. The BP is a policy transfer document that ensures long-term benefits after the project's completion by committing the partners to the improvement of their actions and policies.

BTEAM BROWNFIELD POLICY

OULU TECHNICAL CENTER

Oulu Brownfield Pledge

Strategic level

1. **Sustainable city planning:** a) More coherent city structure and active land use on brownfield sites.
b) More coherent city structure in existing housing areas.

2. **Versatile land policy:** Planning of city-owned land and convertible areas in co-operation with private land owners, by means of land use contracts and quality agreements.

3. **Social responsibility and public participation:** Setting up a specific management group for larger regeneration projects. Involving adjacent communities to maximize community benefit, for example *Memorandum of Understanding* (Belfast) or an interaction workgroup.

   Regular public events on the development process arranged by the municipality. Open discussion, monitoring process and outcome results available for citizens. Part of the consultation process taking place on-site and in adjacent communities. Encouraging and facilitating the temporary uses by residents in harmony with the final functions.

4. **Alternative planning solutions:** Assuring the quality of the area by using alternative land use plans. Leaving space for changes in the design concept – it can evolve and change throughout the process. Involving the University of Oulu in creating alternative plans, workshops and research related to the brownfield projects. Architectural competitions can be used as one method to get alternative planning solutions.

5. **Contaminated soil remediation:** Sustainable methods of soil remediation will be investigated in brownfield areas.

6. **Financing:** Investigating the possibilities for public-private-partnership, private investors and sponsorship in financing the services and buildings. Consideration of different funding options for the development of public cultural objects (lottery funding, international grants etc).

7. **Next steps on strategic level:**
a) A large brownfield area in Pateniemi, a former sawmill with contaminated soil. New Oulu 2013 with merging municipalities: the new area will be investigated for brownfield development sites.
b) Existing housing areas, for example Kaukovainio.

Site specific level: project area Toppila Shore II

1. **Cultural heritage:** restoring the maritime functions and atmosphere in the area. Checking with local communities what cultural heritage means to them. Ideas for functions include for example a shipyard for boatbuilding and repairs, harbor for cruisers, guest marina, training for youngsters, naval visits, boating, skiing, tourist services, accommodation and history of tar, seafaring, fishing, salmon, seal hunting and industrial activities.

2. **Sea Centre and marina:** Strong need for everyday use of Sea Centre for tourists as well as for local residents of all ages. Active summer and winter uses that attract people regardless of weather.

3. **Partnership:** Seeking partners for public-private-partnership regarding the Sea Centre by means of a public procedure.

4. **Public participation:** *Future workshop* to explore the expectations and aspirations for the development in terms of what benefits could be achieved to improve the wider area and communities. Goals and alternative plans will be included in workshops.

5. **Connectivity between the functions:** Connectivity between different quarters is the key. Retaining continuous green belts between the areas. Connections to the existing residential areas Meri-Toppila and Toppilansaari and Nallikari recreational area as well as access to new facilities, northern areas of the city, city centre and the waterfront are critical. Pedestrian and bicycle traffic and public transport connectivity is important.

6. **First step – temporary use:** Considering temporary use of space it is critical to begin the process by raising awareness of the area as a resource and by establishing the location in people's minds. Creating opportunities for temporary uses and encouraging existing unofficial users by providing services and facilities (such as containers that can be used by several groups) and by organizing events.

Taina Pitkä-Koli

Taina Pitkänen-Koli, Technical Committee

The Brownfield Pledge consists of strategic and site specific recommendations which will guide the City in developing their Brownfield sites. The City of Oulu is the first city who has adopted and approved its Brownfield Pledge.

B-Teamnews
THE NEWSLETTER OF BTEAM PROJECT
www.bteaminitiative.eu

Brownfield Management
for building green space networks

Stefanie Roessler / Juliane Mathey
Leibniz Institute of Ecological Urban and Regional Development (IOER). Dresden, Germany

Framework and local situation for "green" Brownfield development in Dresden

The high amount and the diversity of Brownfields within the urban area of Dresden includes – supplementing urban inward development strategies to increase building density and to avoid ongoing usage of greenfields in the urban fringe – manifold potentials to improve and to strengthen the urban green system. Brownfields provide potentials according to needs of adaptation to climate change, to enhance the urban biodiversity and to provide open spaces as part of liveable urban areas. Being aware of these potential benefits green space development of Brownfields is one central issue in Dresden local planning strategies – especially the landscape plan with its vision of a "compact city within an ecological network". Regarding the lack of public resources according to the growing amount of public green spaces and decreasing budgets of municipalities it is necessary to implement approaches of green space development which are cost-efficient or even profitable.

New approaches to develop and manage Brownfields as temporary and/or durable elements of an urban green space network

In these terms there are manifold challenges for future urban green spaces – especially on Brownfields – (1) to be attractive and useable, (2) to benefit climate change adaptation and ecological needs and (3) to be payable or even profitable. According to these needs it is necessary to develop new types supplementing our common green space types, as urban parks, playgrounds etc. Therefore urban agriculture, urban forestry, gardens, alternative sport and leisure facilities, sites for events, low maintained public parks, places for nature discovery and urban wilderness may offer strategies addressing the named challenges.

For example large Brownfields on the urban fringe may be suitable for the production of energy crops, like poplars. This may benefit climate mitigation strategies (carbonate storage) as well as climate adaptation strategies (micro-climatic cooling effects of vegetation). On inner city Brownfield-plots urban forests may offer habitats for plants and animals, but also recreation areas for residents.

Sensitive implementation to ensure sustainability

A sensitive implementation of these several types is necessary to ensure acceptance of the population and to maintain urban qualities. The following issues needs to be considered: size of the area, ground (quality of soil, sealing proportion, contamination), current ecological state, appropriateness related to the urban surrounding (inner city or urban fringe), costs of establishing and costs of maintenance also concerning long-term responsibilities, duration or availability according to ownership and building law and the legal framework. Regarding this framework, "new" green spaces on Brownfields can strengthen the green space system of the city of Dresden.

Bewitch the Heap

Children's Art Competition

Agnieszka Kubica,
City of Ruda Slaska, Poland

At the beginning of May 2011 Ruda Slaska B-Team started to make preparations for EDE in our town. The plan was simple, on the one hand we wanted to do our best to get ready with all organisational issues which were necessary on the 5th September and on the other hand we tried to take this opportunity and invited all inhabitants to work with us in B-Team.

From the previous Brownfield Days' experience, Ruda Slaska B-Team has decided to offer our Brownfields sites, coal mining areas and coking plants, to the children and teenagers of the City. The children's art competition was announced by the Mayor of Ruda Slaska, Ms. Grażyna Dziedzic on 1st June 2011 where in Poland we celebrated the Children's Day.

The rule of the competition was defined by Ruda Slaska B-Team. There were two age groups in the competition, children to the age of 12 years it was called "Bewitch the heap" and for teenagers at the age between 13 and 19 years old - "Reset the heap". However, there were not enough entries in the second group.

The competition was opened from 1st June till 26th August. It was set that the arts will be marked through two juries all B-Team partners and Ruda Slaska inhabitants. What is the most surprising that in these two types of voting the same picture won: "Land of the happiness" created by 5 years' old Kasia Lewandowska. We decided to award a second price to 9 years' old Roksana Belzyt for "Magic heap", because she was always right next to the podium. The price for the both winners is a special unlimited subscription card for every swimming pool in our town which is valid until the end of the B-Team Project. The idea of price was build as example of teamwork, because the children have taken a part in a competition but the award is for all family members.

Generally, there were 17 pictures in the competition and all of them were simply amazing. The principles were to invite children to work with us. We asked them to use imagination because we wanted to see the heaps through their eyes.

At the beginning we thought that children's ideas will be unreal, but now when I'm looking at these pictures proudly, I have to say that they are well designed. Theatres, planetariums, rob parks, zoo, playgrounds it can succeed and with children's charm it makes amazing mixtures. In my opinion these pictures should be a milestone for us in thinking of the heaps' future.

B-Teamnews
THE NEWSLETTER OF BTEAM PROJECT
www.bteaminitiative.eu

Doors open towards the sea

Oulu's Container Event

Jere Klami
City Planning Architect,
Oulu, Finland.

How to involve local communities of the brownfield area? How to make the first step? According to the partner recommendations and the Oulu Pledge it is critical to raise awareness of the area as a resource and by establishing the location in people's minds. Also creating opportunities for temporary uses by providing facilities such as containers and by organizing events was considered important.

Ranta-Toppila is a former sawmill area. It will be planned as a new maritime housing and services area. In the plans are also a Sea Centre, a guest marina and a harbor for cruisers and naval visits.

The first sign of the change and a start of the co-operation is a container located at the shoreline. It is a platform for interaction of various stakeholders and an event of exhibitions, brainstorming and other interactive activities.

The opening event was held on August 18th. It included speeches by the Deputy Mayor, Chairman of the Technical Committee and a member of the City Board, as well as live music, theatre and art workshops. Steamship Oulu made a visit to the area. 40 participants attended the successful event.

UPCOMING EVENTS

Brownfield Days
Vilnius, Lithuania.
3-6 October 2011

Brownfield Days
Hajdú- Bihar, Hungary.
5-8 March 2012

or contact Sabine Kalke,
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Fax: +44 (0) 28 9027 0501

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The Cecil Ward Building
4-10 Linenhall Street. Belfast BT2 8BP
Northern Ireland. United Kingdom

INTERREG IVC
INNOVATION & ENVIRONMENT
REGIONS OF EUROPE SHARING SOLUTIONS

European Union
European Regional Development Fund

Belfast City Council

Report to:	Development Committee
Subject:	Glen Road Development Framework
Date:	22 November 2011
Reporting Officers:	John McGrillen, Director of Development
Contact Officers:	Gerry Millar, Director of Property & Projects Cathy Reynolds, Estates Manager

1	**Relevant Background Information**
1.0	Back in 2009 the Department for Social Development in conjunction with the Strategic Investment Board commissioned consultants GVA Grimley to look at the development potential of a number of parcels of land (10 no approx) adjacent to the Glen Road & Monagh By Pass, known as Glen 10.
1.1	The Glen 10 target area is defined by the Upper Springfield Road & the dBMAP development limit boundary to the north, Glen Road to the south; the east is bounded by the Monagh By-Pass and to the west, Hannahstown Hill. Within this boundary is a mix of established residential, employment, educational and sporting uses. A map of the area is attached at Appendix A. BCC own various portions of land within the area, as identified on the map, and are also landlord for the sites leased to St Teresa's GAC and Sport & Leisure FC.
1.2	The research proposal arose from the work of the Glen 10 Workshops (chaired initially by BCC's Chief Executive and the Deputy Secretary of DSD), which then gave rise to the Glen Road Development Co-Ordination Group. This group was made up with representatives from DSD, BCC, SIB, NIHE and Planning Service. The initial research report undertaken by the consultants indicated that there was a strong case for developing an integrated Development Framework for the overall lands. The work on the Development Framework has been ongoing and is currently in draft format. There is now a Glen 10 Project Board with similar representation to the previous Co-Ordination Group but more recently also including DRD representation. In addition there is a Steering Group made up of non statutory stakeholders and landowners.
1.3	The preferred development scenario previously identified by the consultants in their initial research was a sustainable urban extension and strategic mixed use development, which offers scope to bring forward development in a sustainable, co-ordinated manner with a land use mix that can achieve wider regeneration benefits for the West Belfast area, particularly in terms of addressing housing need and introducing appropriate employment opportunities.

1.4	Key elements of the proposal included the potential for establishing the Glen Road as a destination with a distinctive neighbourhood identity; significant social/affordable and private housing provision; complementary employment generating uses and associated community, leisure and recreation uses and improved physical connections. It was recognised however that the delivery of such an ambitious programme is not without its challenges and would clearly be a major long term project, requiring careful co-ordination of the various landowner and stakeholder interests.
1.5	DSD commissioned the Development Framework in order to test and appraise in more detail the proposed land use options as set out in this initial research report.
1.6	A report was previously brought to the Strategic Policy & Resources Committee on 20/8/2010 to update Members on the progress to date and to inform them of a programme of consultation that was to take place with identified stakeholders including elected representatives of the area, together with statutory bodies, landowners and the community.
1.7	This consultation took place in December 2010 and it had been intended to thereafter produce the draft Development Framework setting out the emerging preferred option, which was to be followed by a formal consultation process. However this didn't happen at that time as there were various issues arising from the community consultation process and the engagement with various landowners which required further consideration. In particular it was recognised, that further work was required on transport and traffic issues. A Traffic Impact Assessment has therefore recently been undertaken and the results of this have subsequently being factored into the draft Development Framework in order to provide an integrated transport solution.
1.8	The current draft Development Framework reflects the views from the previous community consultation exercise as well as the updated traffic assessment work. At this stage it does not, however, necessarily reflect agreement on the part of all the stakeholders (statutory, elected representatives, landowners and community). It is proposed to undertake a more formal structured consultation and Equality Impact Assessment early in the new year, but prior to that it is now intended to undertake a further community engagement process with the local community in early December. The purpose of this event is to provide an update and obtain views on the draft Development Framework.

2	**Key Issues**
2.1	- A draft Development Framework has been prepared on behalf of DSD for lands at Glen Road, which advocates a sustainable urban extension and an integrated traffic solution.
2.2	- The proposed Development Framework will be non statutory but will set out guiding principles for development that seeks to address the physical, planning and infrastructure constraints; promote integration of the sites with the surrounding neighbourhoods; seek to optimise the value of the sites and will incorporate a transport and infrastructure assessment. The Development Framework would not however be binding on any of the land owners and the intention is not to constrain development but to influence landowners to develop proposals that will complement the wider development of the area to the benefit of all and maximise the regeneration and social outcomes.

2.3	- Formal consultation is to take place on the draft Framework in early 2012. Prior to this it is now intended to undertake a further community engagement event with the community in early December and local elected representatives will be invited to this event.
2.4	- It is also being proposed that the consultants acting on behalf of DSD are invited to make a presentation to the Development Committee in January on the draft Development Framework, with Members of the Strategic Policy & Resources Committee also invited. The Glen 10 project has previously been brought to Strategic Policy & Resources Committee as one of the potential Place Shaping /Investment Stimulus projects identified by Members. In addition, any proposed disposal of Council lands in this subject area will be subsequently brought back to SP&R for approval.

3	**Resource Implications**
3.1	<u>Finance</u> None at this time. The Council is landowner of land within the subject area and is currently in negotiations with a social housing provider to purchase land. A separate report will be brought to the Strategic Policy & Resources Committee in the near future on this.
3.2	<u>Human Resources</u> Staff Resource involved as a result of representation on the Project Board and Reference Group and in relation to the management and negotiation in respect of Council land in the subject area.
3.3	<u>Asset & Other Implications</u> The Council owns land in the subject area and the Development Framework should provide a sustainable framework for investment that optimises value and maximises the social and regenerative benefits of the wider area it is not however, statutorily binding on the Council as landowner.

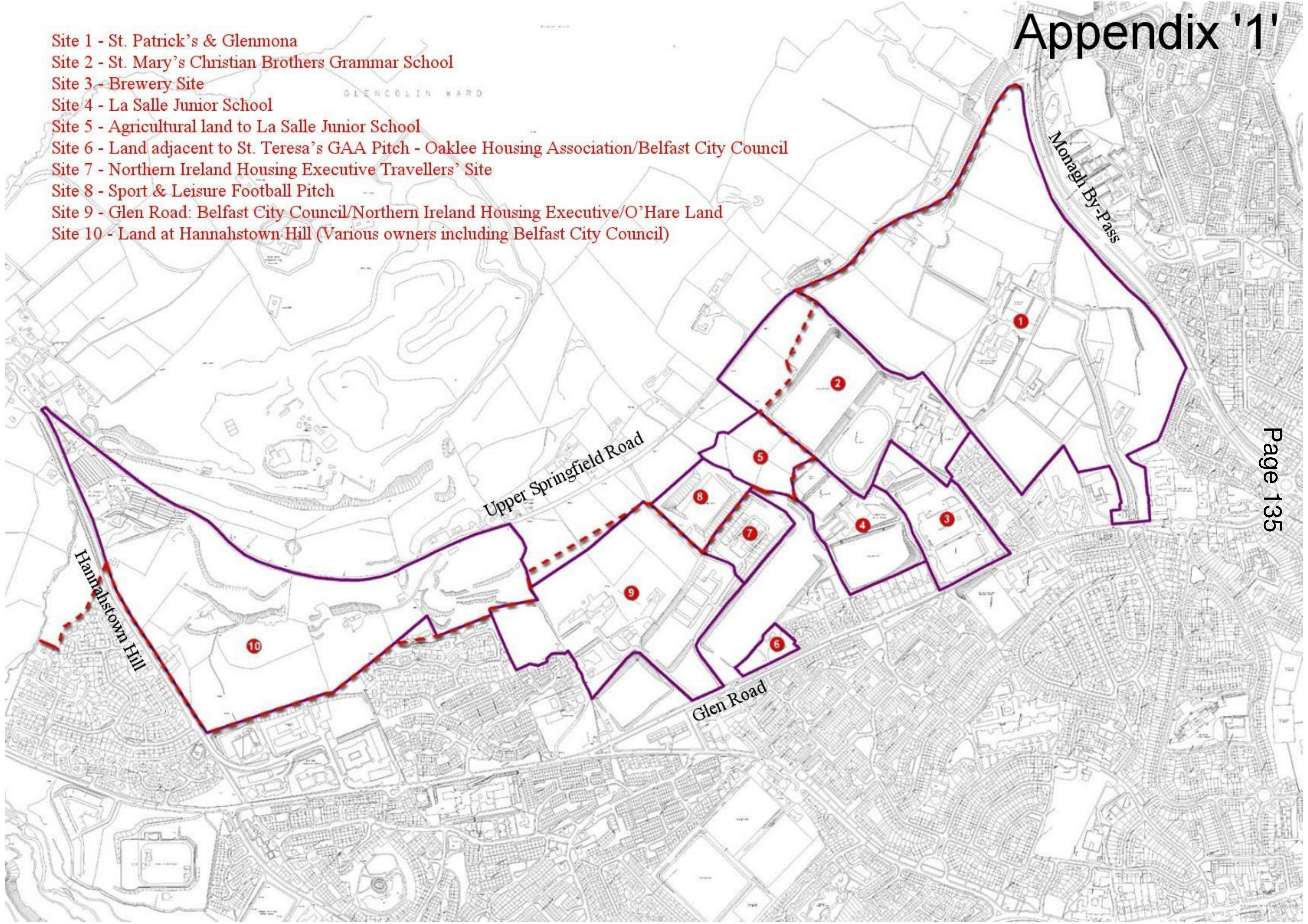
4	**Equality and Good Relations Considerations**
	An Equality Impact Assessment is to be undertaken in Early 2012.

5	**Recommendations**
	Members are asked to 1. Note the update in respect of the draft Glen Road Development Framework 2. Note the proposed pre consultancy community event planned for early December and 3. Invite DSD & their consultants to make a short presentation to the Development Committee in January and to also invite Members of the Strategic Policy & Resources Committee to attend.

6	**Decision Tracking**
Directors of Development & Property & Projects to arrange for a presentation to be made to Development Committee in January	

8	**Documents Attached**
Appendix 1: Location Plan	

Appendix '1'


Site 1 - St. Patrick's & Glenmona
Site 2 - St. Mary's Christian Brothers Grammar School
Site 3 - Brewery Site
Site 4 - La Salle Junior School
Site 5 - Agricultural land to La Salle Junior School
Site 6 - Land adjacent to St. Teresa's GAA Pitch - Oaklee Housing Association/Belfast City Council
Site 7 - Northern Ireland Housing Executive Travellers' Site
Site 8 - Sport & Leisure Football Pitch
Site 9 - Glen Road: Belfast City Council/Northern Ireland Housing Executive/O'Hare Land
Site 10 - Land at Hannahstown Hill (Various owners including Belfast City Council)
GLENCOLIN WARD
Monagh By-Pass
Upper Springfield Road
Glen Road
Hannahstown Hill
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Agenda Item 5a

Report to:	Development Committee
Subject:	Belfast Business Awards
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Shirley McCay, Head of Economic Initiatives, ext 3459

1	Relevant Background Information
1.1	The Belfast Business Awards is an annual awards scheme comprising 21 award categories specifically aimed at recognising and rewarding business excellence in the city.
1.2	The Belfast Business Awards have been running since 2004 – initially as a project led by Belfast City Centre Management Company (BCCM) in conjunction with Belfast Chamber of Trade and Commerce (BCTC). The current management structure for the business awards event (in place since 2010) is that the Council is the lead delivery agent supported by Belfast City Centre Management (BCCM) as organising partner. BCCM is paid a fixed sum for its role in this work, in addition to the core funding that it receives from Council each year. An event management company is contracted by BCCM to undertake all relevant duties in preparation for the event and on the evening itself.
1.3	The awards offer an opportunity to acknowledge the importance that the Council attaches to supporting a dynamic, competitive private sector in the city. They are also a means of rewarding excellence among local companies.
1.4	While the Belfast Business Awards is one significant awards scheme in which the Council is engaged, there are a number of others including Fair Trade Awards, Brighter Belfast Awards etc. Given the current challenging economic climate and the significant volume of work involved in each of these events, Members may wish to consider bringing together some of these awards programmes, in a way that does not impact adversely on the integrity and value of the awards themselves.

2	**Key Issues**
2.1	The 2011 Belfast Business Awards attracted over 220 entries across 21 categories. This represented an increase of almost 40% on entries in the previous year. Some categories were more heavily subscribed than others. The awards event in April 2011 attracted around 380 guests, all of whom paid for participation at the event. The event was oversubscribed.
2.2	Feedback from participants – particularly participating businesses – suggests that they value the awards and that they use their award as part of their promotional activity.
2.3	Feedback from sponsors indicates that they see value in their association with the event. As might be expected in the current climate, the challenge of identifying sponsorship for 21 awards (as well as principal sponsor funding) was significant and there were 4 categories that were sponsored by Belfast City Council in the absence of other funders.
2.4	With regard to the format of the event, the last two ceremonies have taken place in the City Hall and this is widely viewed as an environment which is conducive to such an event and which elevates the Council role in the awards.
2.5	Although three new award categories were added last year, feedback suggests that there may be merit in reducing the number of categories as 21 appeared to be too many in terms of ensuring that proceedings ran smoothly on the evening.
2.6	With regard to the timing of the event, although the April date was widely seen as being popular, the planning timeframes required for such an event would suggest that it may be more appropriate to consider an Autumn event in 2012.
2.7	Finally, there are a number of other award schemes in which the Council is involved and which involve business categories. There may be merit in exploring the opportunities for integrating these with the Belfast Business Awards in the future. It is also considered that the working relationship with Belfast City Centre Management is useful and should be maintained as part of the 2012 event, should it proceed.

3	**Resource Implications**
3.1	Financial In 2011 the costs of delivering the awards amounted to £80,000. These costs were met by a combination of Belfast City Council funding (£20,000), sponsorship income from principal and category sponsors and ticket sales. There was a small underspend due to support being provided in kind and to a reduction in certain costs. It is anticipated that the budget for an event in 2012 would be broadly similar to the 2011 event. A management fee of £9,000 was paid to BCCM in addition to this amount.

4	**Equality and Good Relations Considerations**
	There are no specific equality and good relations considerations attached to this report.

5	**Recommendations**
	Members are asked to: - Note the update on the Belfast Business Awards - Agree to the proposal for a 2012 Belfast Business Awards and to exploring the potential for involving the business elements of other awards schemes in which the Council is engaged. - Approve a budget of up to £29,000 to cover financial contribution and management fee to BCCM, if appropriate.

6	**Decision Tracking**

Progress report on outcomes to be presented to Committee in September 2012.

Timeframe: September 2012 Reporting Officer: Shirley McCay

7	**Key to Abbreviations**

BCCM – Belfast City Centre Management
BCTC – Belfast Chamber of Trade and Commerce.

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Report to:	Development Committee
Subject:	Lobby with respect to EU Structural Funds for NI Post 2013
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	Laura Leonard, European Manager, ext 3577

1 Relevant Background Information

1.1 Members will be aware, that since the early 1990s, Northern Ireland as a European region has benefited from over 1 billion Euros in European Mainstream Structural funds, as well as significant funding from the many EU wide funding programmes accessed directly through the EU Commission. European funding operates in 6 year cycles, and currently, Northern Ireland benefits from the following programmes within the current cycle 2007-2013.

- European Regional Development Fund (ERDF) distributed via Department of Enterprise Trade and Industry (DETI)
- European Social Fund (ESF) distributed via Department for Employment and Learning (DEL)
- INTERREG IVA distributed via Special EU Programme Body (SEUPB)
- Peace III distributed via SEUPB
- Rural Development Programme (RDP) distributed via Department of Agriculture and Rural Development (DARD)

1.2 Members will recall a report to the Development Committee on 10 November 2010, seeking approval for the European unit to be proactive in trying to influence the shape of Structural Funds post 2013. To this end, the unit has engaged actively with Eurocities to contribute to a city government position with regards to how future funding will be prioritised and distributed, and the role local authorities should play with respect to this.

1.3 Belfast City Council contributed to the Eurocities response and provided a direct Council input to the UK government response, with respect to the EU Commission’s Consultation regarding the 5th Cohesion Report in November 2010. This report assessed the state of play with regard to regional policy and

	economies across Europe, and looked to future trends and needs to reduce economic and social disparities and increase prosperity across the Union. These responses may be accessed from the EU Unit but in summary they urged the UK and Northern Ireland governments to have a strengthened ring fenced urban dimension to future Structural Funds programmes, and to devolve some responsibility for the design and delivery of European funds to local authorities.
1.4	At this time, Belfast City Council through the EU Unit, with Members approval, began to informally communicate early views (based on an urban policy dimension) to Northern Ireland government departments, Northern Ireland Assembly officials, MEPs and indeed directly with Commissioner Hahn, the EU Commissioner responsible for future Cohesion Policy and Structural Funds.

2	**Key Issues**
2.1	As a region of Europe, we are now at an important stage in the calendar for the emerging EU Budget and priorities for the period 2014-2020. The following significant progress has been made in the last few months.
2.2	<u>29 June 2011 – 376 billion Euro allocated to EU Budget 2014-2020</u> Publication of the European Commission's proposal for a Multi-Annual Financial Framework (MFF) for Cohesion Policy. - €162.6 billion for Convergence Regions (N/A) - €38.9 billion for Transition Regions (N/A) - €53.1 billion for Competitiveness Regions (Northern Ireland) - €11.7 billion for Territorial Cooperation (INTERREG) - €68.7 billion for Cohesion Fund (N/A) - €40 billion for Connecting Europe Facility
2.3	Note: The European Social Fund must represent at least 52% of Operational Programmes per Member State.
2.4	In summary the MFF confirms that - Cohesion Policy and Structural Funds are for all regions of the EU (based on GDP rate) - Clear alignment to EU 2020 objectives and targets - 4% reduction in the overall Structural Funds budget for Europe - Focus clearly on the poorest regions - Includes a stronger urban dimension with dedicated resources (at least 5%) and specific governance arrangements to include local players including Councils). - 31% increase in Territorial Cooperation i.e. INTERREG, Urbact and Peace type activity. - Focus on EU priorities linked to Europe's 2020 strategy (new 10 year Strategy for Europe) but in particular on (i) energy efficiency and renewable energies (ii) innovation and competitiveness in SMEs (iii) employment, education and poverty alleviation. - Creation of a more transparent Partnership Contract Agreement with Member States and the Commission. - Conditionality and results based programmes and performance bonuses

	for Member States. - A new Connecting Europe Facility (€40 billion) for pre determined large scale ICT, transport and energy projects across Europe. As part of the core network corridors for transport the rail connection improvement from Belfast to Dublin has been identified for ongoing finance until 2018. - Each Member State must allocate 20% of ERDF funding to competitiveness and employment, 60% of ERDF funding on SMEs, research and innovation and 20% to poverty and social inclusion.
2.5	<u>5 October 2011</u> Publication of the new EU Regulations relating to the EU Budget 2014-2020, which set out the general legal provisions governing the European Regional Development Fund (ERDF), the European Social Fund (ESF), the Agricultural, Fishers and Maritime Fund, and the Cohesion Fund (not applicable to Northern Ireland).

2.6	The key aspects of the new regulations may be summarised as follows;
	- Structural funds for all regions
	- A new Common Strategic Framework i.e. a common set of rules governing the EU funds outlined above.
	- Partnership Contracts agreed between the EU Commission and Member States setting out Member States' commitments to concrete actions to deliver EU 2020 objectives.
	- Member State programmes will be based around a menu of EU thematic objectives which are in line with the EU 2020 Strategy, namely investments in:
	    - Research and innovation
	    - Information and Communication technologies (ICT)
	    - Competitiveness of SMEs
	    - Shift towards a low-carbon economy
	    - Climate change adoption and risk prevention and management
	    - Environmental protection and resource efficiency
	    - Sustainable transport and removing bottlenecks in key network infrastructures
	    - Employment and supporting labour mobility
	    - Social inclusion and combating poverty
	    - Education, skills and lifelong learning
	    - Institutional capacity building and efficient public administration
	- At least 80% of ERDF to be allocated at National (Member State) level to
	    (i) energy efficiency and renewables
	    (ii) improvement of the competitiveness of Small and Medium Sized Enterprises
	    (iii) innovation
	- ESF fully aligned to EU targets on employment, education and poverty reduction.
	- Minimum of 20% of ESF allocation to be invested in combating social exclusion and poverty.
	- Member States allowed to combine ERDF and ESF in match fund programmes to better suit their growth plans (PFG) to allow for a bigger impact on the ground.
	- Strong incentives will be offered for rewarding performance and delivery in Member States.
	- Reinforced territorial cooperation dimension across regions (cross border,

	inter regional and transnational). - A clear focus on territorial cohesion i.e. sustainable urban development plans with at least 5% of ERDF resources in Member State plans allocated for "integrated actions", at a local level. - A new community led development approach working on the Leader, Rural Development Programme LAG model to deliver on special local actions. - In addition the Commission will launch extra calls for innovative actions in urban areas and make ESF human capital investment in cities easier.
2.7	<u>NI and Belfast City Council Context</u> NI will continue to receive EU Structural Fund support through one of the 3 defined categories – that of well developed regions, whose GDP per capita is above 90% of the average with a 50% co financing rate for NI.
2.8	NI government can ensure a minimum of 5% of future Structural Funds are spent on sustainable urban development issues through designed Joint Action Plans for flexible geographical areas – A Belfast or COMET Plan for targeted local area investment?
2.9	NI government can opt to introduce community led local intervention plans developed and delivered by partnerships of social partners, local authorities and Non Government Organisations (NGOS).
2.10	NI will continue to benefit from INTERREG cross border, transnational and inter-regional funding but needs to lobby for a specifically agreed Peace IV programme.
2.11	NI must design future Structural Funds plans that reflect relevant priorities of the 11 thematic priorities in the new regulations and align closely to EU 2020 targets. NI can opt for multi fund programmes combining ERDF and ESF and focus on 'Integrated territorial investments' based on urban or the territorial strategies.
2.12	Belfast City Council and its stakeholders can be involved at the design through to implementation stages of the future funds including sub-delegation of fund management if the will is there at central government level.
2.13	<u>Way Forward</u> On 27 October 2011, the Chief Executive of Belfast City Council along with the Director of Finance, the Director of Development and the EU Manager met with the Head of EU Programmes for the DFP alongside senior representatives from Derry City Council. The purpose of the meeting was to explore the likely shape and delivery of Structural Funds in NI Post 2013 and the role that Belfast and Derry City Council would have as the 2 urban centres and regional drivers of the NI region.
2.14	DFP colleagues confirmed at the meeting that they are working their way through the detail of the newly published regulations and will provide detailed feedback to the UK government (Department of Business, Innovation and Skills) who will engage in high level negotiations with the EU Commission, Parliament and the other Member States.
2.15	This process will flow late into 2012, as all the regulations must be examined and discussed at every level.

2.16	DFP also confirmed that there is a still a real lack of clarity on how community led development models and Joint Action Plans will be developed and delivered. DFP welcomed the early lobbying from both Belfast and Derry City Councils and requested that both Councils provided feedback on the regulations. They agreed to consult regularly with both Councils through BCC's EU Unit and to engage as early as possible once they begin to draft the future EU Structural Funds Operational Programmes for NI.
2.17	They confirmed the following timeline for the beginning of the next programming fund: <u>EU Level</u> - End 2011 Draft legislative proposals to be launched i.e. CAP Reform, Connecting Europe Facility and Horizon 2020 (successor to FP7) - Dec 2011- Publication and consultation on the EU Commission's draft Common Strategic Framework - 2011-2012 Member States and EU Parliament and Council to discuss and amend the MFF and legislative package and Member States begin to draft Partnership Contracts - 2013 Development of each Member State's Operational Programmes - 2014 Entry into force and adoption of 27 Programmes 2014-2020
2.18	<u>NI Level</u> With this timetable in mind, Members are asked to consider and agree a lobbying plan for BCC to undertake with respect to ensuring that there is a strong urban dimension of the future programmes and that BCC will have a role in defining an Integrated Territorial Investment Plan for Belfast and its functional urban area. (COMET).
2.19	The following timeline is proposed: - Paper to agree lobby plan to Derry City Council and Belfast Committees – November 2011 - Hold a facilitated workshop early 2012 with key stakeholders including NI government departments, the Port, Belfast Metropolitan College and others to define the Belfast priorities post 2013, building on the forthcoming Belfast Masterplan, Skills and Employability Strategy and the Integrated Economic Development Strategy and Urban Policy Framework - Engage during this process with the 5 COMET Councils to ensure the priorities of the functional urban area are defined - During the period December 2011 – March 2012, lobby: (i) MPs and UK Representational Office in Brussels (ii) OFMDFM, DETI, DEL, DSD, DFP (iii) NI Assembly Committees (iv) Junior Ministers (v) DCLG, BIS and UK Minister for Cities (vi) NILGA to ensure urban lobby is part of their overall lobby work with Committee of the Regions (vii) MEPs, COR and ECOSOC Members (viii) Ongoing participation in Eurocities and UK Eurocities common lobby.

3	**Resource Implications**
3.1	Staff implications within European Unit to develop and lead the lobby.
3.2	€28,000 to engage an external Consultant to facilitate a Stakeholder Workshop and define common priorities for a Belfast integrated EU Plan.

4	**Equality and Good Relations Considerations**
4.1	There are no Equality and Good Relations considerations attached to this report.

5	**Recommendations**
5.1	Members note the content of the report and agree to a lobby action plan led by the EU Unit and Chair and Deputy Chair of Development.
5.2	That Members agree to the use of a Consultant to facilitate a stakeholder's workshop and process to define priorities for Belfast and the functional urban area aligned to the regulations, themes and possibilities for the Belfast Metropolitan Area.

6	**Decision Tracking**
There is no decision tracking attached to this report.	

7	**Key to Abbreviations**

COMET - Councils of the Metropolitan Area
BIS – Department for Business Innovation and Skills
COR – Committee Of the Regions
ECOSOC – The Economic and Social Council
DARD – Department of Agriculture and Rural Development
DCLG – Department for Communities and Local Government
DEL – Department for Employment and Learning
DETI – Department of Enterprise Trade and Industry
DSD – Department for Social Development
DFP – Department of Finance and Personnel
ERDF – European Regional Development Fund
ESF – European Social Fund
FP7 – Seventh Framework Programme
GDP – Gross Domestic Product
ICT – Information and Communication Technologies
INTERREG/ INTERREG IVA – European Funded Cross Border Programme
MFF – Multi-Annual Financial Framework
NGOS – Non Government Organisations
NILGA – Northern Ireland Local Government Association
RDP – Rural Development Programme
SEUPB – Special EU Programme Body
SMEs – Small Medium Enterprises

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Agenda Item 6a

Report to:	Development Committee
Subject:	Quarterly Financial Report – Quarter 2: 2011/12
Date:	22 November 2011
Reporting Officer:	John McGrillen, Director of Development, ext 3470
Contact Officers:	David Orr, Business Support Manager ext 3502

1	Relevant Background Information
1.1	The Strategic Policy and Resources Committee agreed at on 18 June 2010 that:
1.2	- the council would produce financial reporting packs for the Strategic Policy and Resources Committee and each Standing Committee on a quarterly basis
1.3	- the Budget and Transformation Panel would also receive monthly financial updates if there were any significant issues to report.
1.4	The reporting pack (Appendix 1) contains a summary dashboard of the financial indicators and an executive summary explaining the financial performance of the Development Committee in the context of the financial performance of the overall council. It also provides a more detailed explanation of each of the relevant indicators covering the year to date and forecast financial position.
1.4	The style and layout reflect much of the discussion and feedback arising from the Members' financial training at the end of September 2010. As we previously advised the Committee, we will continue to develop the style and contents of the reports in liaison with members.
1.6	Central Finance and our departmental management team have worked together to develop the information within this financial reporting pack.

2 Key Issues

Current and forecast financial position 2011/12

2.1 Net expenditure for the Development Department was £101k below budget for the quarter representing 1% of estimated net expenditure.

2.2 The forecast year-end position for the Department is estimated to be £19,618k which is £265k (1.3%) below budget.

2.3 The reported £101k under spend is a combination of under spends in (i) premises; (ii) supplies and services expenditure; and (iii) transport. These underspends are offset by an overspend with regard to grants distributed.

2.4 The Department will continue to monitor the variance between actual and budgeted expenditure during quarter 3.

The financial reporting pack contains more detail on both the overall Council position and the financial performance in each of the Services within the Development Department.

3 Resource Implications

3.1 There is a year to date under spend of £101k and a forecast under spend of £265k.

4 Equality and Good Relations Considerations

There are no equality and good relations considerations attached to this report

5 Recommendations

5.1 Members are recommended to note the above report and associated financial reporting pack.

6 Decision Tracking

There is no decision tracking attached to this report

8 Documents Attached

Appendix 1: Financial Reporting Pack

Performance

Development Committee

Quarterly Finance Report

Report Period: Quarter 2 2011/12

Dashboard: Quarter 2, 2011/12

Strategic Element: Financial Planning	Variance £,000 (under)/ Over Q1	Indicator % Q1	Variance £,000 (under)/ Over Q2	Indicator % Q2			Page no
Year to date variance							**3**
BCC	(1,482)	(4.9%)	(2,060)	(3.6)		↑	
• Development Committee	(134)	(2.3%)	(101)	(1.0%)		↑	
○ Community Services	52	3.3%	62	2.2%		↑	
○ City Events and Venues	64	4.2%	(44)	(1.8%)		↑	
○ Economic Initiatives	(165)	(8.0%)	(182)	(6.3%)		↑	
○ Directorate	(84)	(10.8%)	63	4.0%		↑	
Forecasted % variance							**4**
BCC	(210)	(0.2%)	(1,054)	(0.9%)		↓	
• Development Committee	(100)	(0.5%)	(265)	(1.3%)		↓	
○ Community Services	0	0.0%	(15)	(0.3%)		↓	
○ City Events and Venues	50	1.2%	210	5.1%		↓	
○ Economic Initiatives	(50)	(0.8%)	(350)	(5.7%)		↓	
○ Directorate	(100)	(2.6%)	(110)	(2.8%)		↓	

Notes:

1. Negative variances represent an under spend

2. Movement on last quarter: ↑ Better ↓ Worse → Unchanged

3. Tolerance R/A/G guide for % variances: -7 -6 -5 -4 -3 -2 -1 0 1 2 3 4 5 6

Executive Summary

The **Development Department** is under spent by £101,000, or 1% of it's net budgeted expenditure of just over £9.8 million at the end of quarter two.

Community Services and Directorate are overspent by £62,000 (2.2%) and £63,000 (4%), respectively, while Economic Initiatives is under budget by £182,000 (6.3%) and City Events and Venues is under budget by £44,000 (1.8%).

There are four main areas which give rise to the current overall £101k (1%) under spend within the Department at the end of quarter two:

- Premises expenditure was £1,508k, which was £96k (6%) less than the budgeted figure of £1,604k. This variance is mainly due to reduced repairs and building cleaning in the Waterfront and Ulster Halls during quarters one and two;

- Supplies and services of £2,680k was £365k (11.9%) less than budget of £3,045k. The under spend is in the following categories of expenditure :equipment, tools and materials, professional services; licences, uniform and advertising and marketing. This situation will be kept under review by management during quarter three;

- Transport costs are £71k, which is £30k (30%) less than the budget of £101k. This variance is as a result of reduced transport costs in Community Services over the summer period;

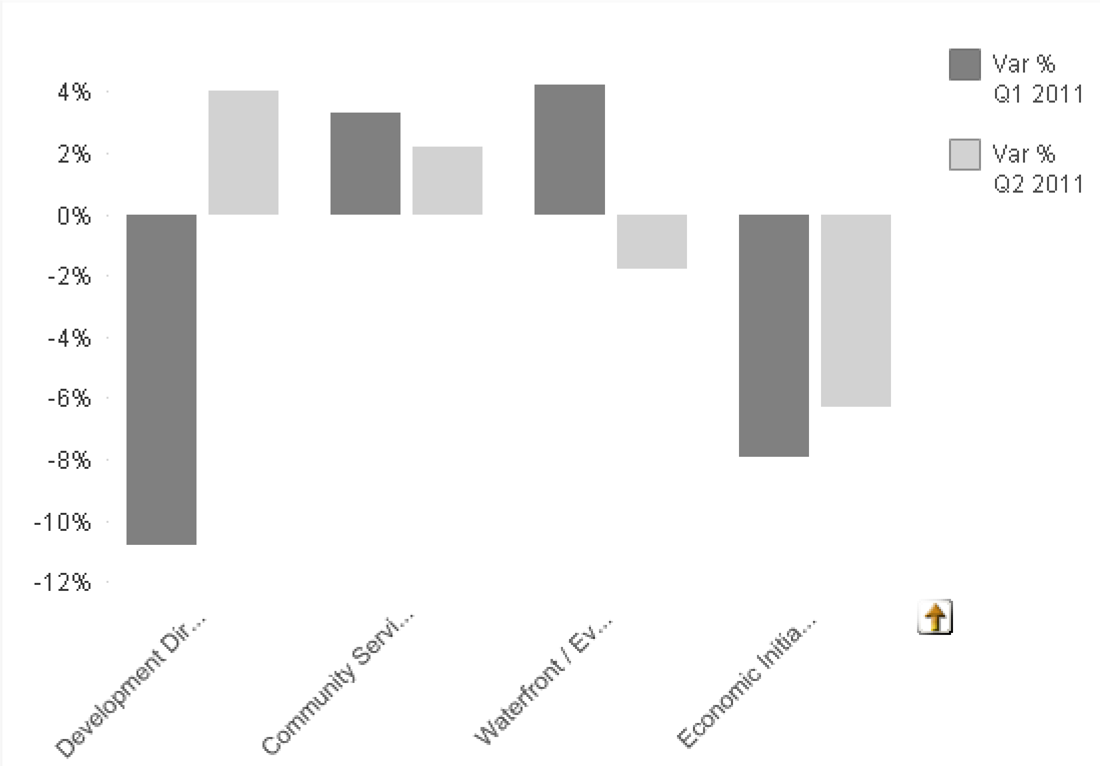
- Subscriptions and Grants paid amounted to £4,115k, which was £390k (10.5%) more than the budgeted figure of £3,725k. This was due to differences between the profiled budget and the actual spend distribution and will self correct over time.

It is currently forecast that the Development Department will be under spent by £265k (1.3%) at year end.

- Community Services is forecast to be £15k under budget at year end.
- Economic Initiatives is forecast to be £350k under budget at the year-end.
- Directorate is forecast to be under spent by £110k under budget at year end.
- The City Events and Venues Section is forecast to be over budget by approximately £210k at year-end as a result of reduced income at the Waterfront and Ulster Halls.

Year to Date % variance

This indicator calculates the difference between the budgeted net expenditure and the actual net expenditure as a percentage. It is reported for the year to date.

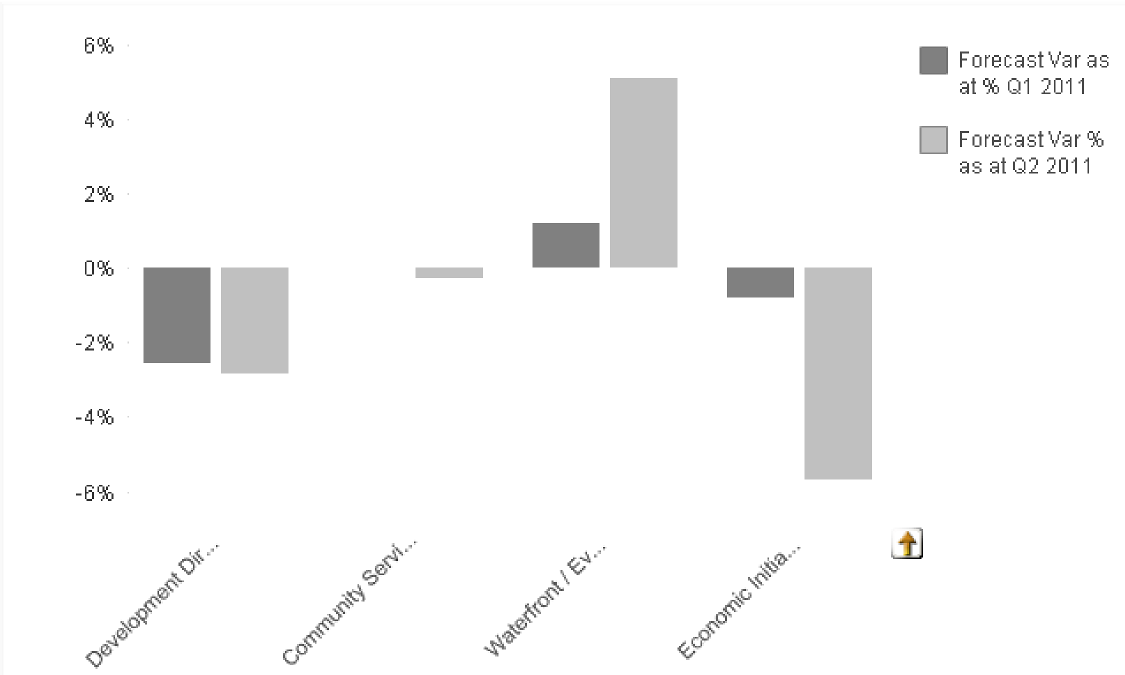


Commentary and action required
Community Services is over spent by £62,000 at the end of Quarter 2 (Budgeted expenditure: £2,851,131; Actual expenditure: £2,913,341). An over spend in grants £199k as a result of payments having been made earlier than anticipated in relation to budget profiles is offset by underspends £137k in premises, supplies and services and transport. **City Events and Venues** is under spent by £44,000 at the end of Quarter 2 (Budgeted expenditure: £2,479,654; Actual expenditure: £2,435,908). Reduced income against planned budget within the Waterfront and Ulster Halls £37k is offset by an underspend in premises and supplies and services expenditure £81k against planned budgets at the end of quarter 2. **Economic Initiatives** is under spent by £182,000 at the end of Quarter 2. (Budgeted expenditure: £2,885,935; Actual expenditure: £2,703,549). An underspend in supplies and services within the Economic Development and the Planning and transport units £241k is offset by an increased spend against budget in Tourism, Culture and Arts grants (£59k). This is due to the timing of grant payments varying from the profiled budget.

Directorate is over spent by £63,000 at the end of Quarter 2.
(Budgeted expenditure: £1,561,405; Actual expenditure: £1,624,303).
A £125,000 over spend in grants due to timing differences between actual distribution and the budgeted profile is offset by a £62,000 under spend in supplies and services.

Forecast % variance

This indicator calculates the difference between the planned net expenditure and the forecasted net expenditure as a percentage. It is reported as a forecast for the end of the financial year.



Commentary and action required
It is currently forecast that the Development Department will be under budget by £265k (1.3%) at year end. • Community Services is forecast to be £15k under budget at year end as a result of anticipated reduction in expenditure relating to citywide community facilities. • Economic Initiatives is forecast to be £350k under budget at the year end as a result of: (i)anticipated delays in expenditure being incurred within Economic Development caused by delays in DETI approval processes (£220k); (ii)anticipated delay in BMAP which will not progress in this financial year(£90k); (iii)by increased income in the Markets as a result of the Sunday Market and new contract regarding the Continental Market (£40k).

- Directorate is forecast to be under spent by £110k which reflects vacant posts in Business Support and SNAP (£75k) and through project delays in the Policy Unit and SNAP (£35k).

- The City Events and Venues Section is forecast to be over budget by approximately £210k at year-end as a result of reduced income at the Waterfront and Ulster Halls.

Development Committee - Main Items of Expenditure

	Plan YTD £'000	Actual YTD £'000	Variance YTD £'000	% Variance	Plan 11/12 £'000	Forecast for Y/E at P6 £'000	Forecast Variance £'000	% Variance
Development Committee	**9,778**	**9,677**	**(101)**	**(1.0%)**	**19,831**	**19,566**	**(265)**	**(1.3%)**
Community Services	**2,851**	**2,913**	**62**	**2.2%**	**5,681**	**5,666**	**(15)**	**(0.3%)**
City Events and Venues	**2,480**	**2,436**	**(44)**	**(1.8%)**	**4,128**	**4,338**	**210**	**5.1%**
Waterfront/Ulster Hall	1,524	1,586	62	4.1%				
City Events	955	850	(106)	(11.0%)				
Economic Initiatives Section	**2,886**	**2,704**	**(182)**	**(6.3%)**	**6,142**	**5,792**	**(350)**	**(5.7%)**
Tourism Culture and Arts Unit	2,244	2,298	54	2.4%				
Economic Development	308	281	(28)	(9.0%)				
Planning and Transport	282	137	(145)	(51.3%)				
Planning and Development	51	(13)	(64)	(125.2%)				
Directorate	**1,561**	**1,624**	**63**	**4.0%**	**3,881**	**3,771**	**(110)**	**(2.8%)**
City Development	170	366	196	115.5%				
Development Business Support	888	832	(56)	(6.3%)				
European Unit	137	99	(39)	(28.2%)				
Policy and Research	182	188	6	3.1%				
SNAP	185	140	(45)	(24.1%)				

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