



Subject:	Visit Belfast Business Plan 2023-24
Date:	8 March 2023
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Kerry McMullan, Tourism and Events Development Manager

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

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

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of the report is to present the request for funding from Visit Belfast for the 2023/24 financial year and to set out the organisation's strategic development and operational delivery, focused on supporting tourism recovery. Members should note that Visit Belfast will be in attendance at the Committee to present the detail of its 2023/24 plan.
2.0	Recommendations
2.1	The Committee is asked to:

	<ul style="list-style-type: none"> - Note the draft Visit Belfast business plan 2023/24. The overall funding requirement for Visit Belfast in the coming financial year has been taken account of in the revenue estimates that have already been approved by the Council. - Approve funding agreement for 2023-24 and agree a funding allocation of £2,035,710 for 2023/24, subject to the development of a funding agreement confirming priority areas of activity as outlined in the presentation and agreed targets.
3.0	Main report
3.1	Members will be aware that Visit Belfast is the principal Destination Management and Marketing Organisation for the city of Belfast. Visit Belfast leads on the tourism marketing activities in Belfast and targets both the leisure and business tourism markets. It is a membership organisation with more than 500 member businesses across the wider hospitality industry. Visit Belfast works, on behalf of its members, with a range of public and private partners including Tourism NI, Belfast Chamber and the Business Improvement Districts (BIDs) to promote Belfast as a tourism destination.
3.2	Visit Belfast is a public/private partnership. Its current Chairperson is Kathryn Thomson, Chief Executive of the National Museums of Northern Ireland. Belfast City Council has four Councillor representatives on the Board: Councillor Fred Cobain, Councillor Eric Harvey, Councillor Paul McCusker and Councillor Séanna Walsh. Also represented on the board are members from the private, public and community sectors.
3.3	The tourism and hospitality industry in Belfast had been going from strength to strength as Belfast continued to drive the regional tourism economy; in 2019 (last published Local Government District tourism statistics by the Northern Ireland Statistics and Research Agency NISRA), Belfast hosted 1.9m trips accounting for one third of all tourism trips to Northern Ireland and tourism spend amounted to £417m, 40% of Northern Ireland tourism spend.
3.4	In advance of COVID-19 the trajectory had been positive with forecasts suggesting that the sector would account for around 15% of new jobs in the decade. This was further reinforced by the inclusion of tourism as a key growth sector in the City Deal. This acknowledged the fact that the sector was already a significant economic generator but recognised the need for significant additional investment in order to sustain growth. The council's Cultural Strategy "A City Imagining" also identified the importance of growing the city's sustainable cultural tourism offer through a creative approach that respects the city's heritage and communities.

3.5	<p>Belfast City Council has also developed a 10-year vision and plan for tourism in the city; “Make Yourself at Home”. This committee approved the tourism plan which sets out a vision for the future of tourism in the city that is centred on a people-based and sustainable model of development with a focus on: increasing the coherency of the Belfast experience; supporting quality authentic products; developing skills; and strengthening the city’s position through marketing and communications.</p>
3.6	<p>It is in this context that Visit Belfast has set out their business plan to support the rebuilding of city tourism. Further details of activities that will be undertaken as part of this plan with associated targets will be set out in the presentation to the Committee and are included at Appendix A.</p>
3.7	<p>Rebuilding City Tourism</p> <p>The new tourism plan for Belfast, <i>Make Yourself at Home</i>, recognises both the challenges to tourism recovery as well as the opportunities to rebuild tourism in such a way as to maximise the positive impact that it can have on the city. As the Destination Management (and marketing) Organisation (DMO) for Belfast, Visit Belfast has an important role to play in realising a new vision for tourism. They have responded to this by setting out a new approach:</p> <p><i>“To create and service visitors for Belfast and Northern Ireland in order to generate economic benefit and inclusive growth, creating jobs and prosperity for the city region, enabling Belfast to become a more sustainable place to visit, meet and live in.”</i></p>
3.8	<p>This will require the ongoing adaptation and updating of their strategic planning and delivery recognising that the DMO must respond to the changing environment with a sensitivity to both economic and social context within which they work. This is evident in an increased focus on supporting local tourism and on sustainability.</p>
3.9	<p>Generating £417m tourism spend and supporting 10% of city jobs in 2019, Belfast’s tourism growth and development have seen the city’s tourism industry crucially emerge both as a key pillar of the city economy, and also of strategic importance to the wider visitor economy of Northern Ireland. As the regional driver for the Northern Ireland visitor economy, the Belfast City Region is playing a significant and important part in regional recovery plans.</p>
3.10	<p>Tourism Outlook and indications of Recovery</p>

	<p>Despite the outlook being far from certain, tourism can contribute to the economic and social wellbeing of the city with high potential to create jobs quickly and provide the economic impetus for a wider economic recovery.</p>
3.11	<p>According to the United Nations World Tourism Organisation (UNWTO), international tourism saw stronger than expected results in 2022, backed principally by pent-up demand and the lifting or relaxation of travel restrictions in a large number of countries. More than 900 million tourists travelled internationally in 2022, double the number recorded in 2021. Every global region recorded notable increases in international tourist numbers, with Europe reaching nearly 80% of pre-pandemic levels as it welcomed 585 million arrivals.</p>
3.12	<p>Inbound visitors to United Kingdom and Ireland is recovering strongly - pent up demand and the desire to travel saw inbound visitor recovery rates to both the UK and Ireland exceed the global level of 63% of pre pandemic levels. Visit Britain expects year end figure for visitors and spend in 2022 to reach 73% and 91% of record 2019 levels respectively, whilst Tourism Ireland estimated 2022 tourism spend to the island of Ireland to be at 75% of pre-pandemic levels</p>
3.13	<p>The reporting of tourism statistics and meaningful visitor analysis at a local level continues to be impacted by the effects of the pandemic. While tourism related surveys including passenger and household travel surveys have resumed, it remains unclear when we will see a full return of annual government tourism statistics particularly at a local level. Full year statistics for 2022 – 23 are not yet confirmed, however, a range of data analytics from a number of sources have provided valuable metrics illustrating recovery has been stronger than expected including for example - 1.3m hotel rooms sold: 93% of 2019 levels and hotel revenue 19% above 2019 levels; 141 cruise ships welcoming 250,000 cruise visitors came to Belfast: 91% of 2019 levels; 95 conferences attracting 30,711 delegates generating over 103,000 bed nights; 2.3m web visits: 26% above 2019 levels; 551,059 visitor enquiries: 61% of 2019 levels.</p>
3.14	<p>Visit Belfast's business plan mirrors the Council's long term tourism plan to develop a regenerative model and to place tourism at the heart of recovery working with the tourism sector, businesses, organisations and policy makers. In tandem with city tourism development plans, Visit Belfast is proposing to implement new and innovative approaches to its destination sales, marketing and communications and visitor servicing. This will be achieved by utilising the City's core values and place branding to reposition itself, promoting</p>

authentic Belfast experiences to enhance competitiveness in order to deliver growth that will benefit residents, businesses and visitors equally.

3.15

Visit Belfast has considered their own strategic and operation plans in the context of the Council's tourism priorities as set out in the 10 year tourism plan: *Make Yourself at Home*:

- Grow Belfast: The role of tourism is critical to city recovery. For Belfast this will mean the stabilisation of the tourism industry and the requirement for further growth.
- Positioning Belfast: strengthening Belfast's positioning in domestic and international tourism markets - business and leisure - and as a gateway to the region.
- Experience Belfast: increasing connectivity between existing and planned for tourism assets will improve the overall Belfast Experience, inspiring the visitor to stay longer, return and to recommend the city to others.
- Sustain Belfast: The sustainable development of cities is not just a local imperative it is also a key motivation for the visitor.

3.16

Priorities for Visit Belfast's business plan include:

- Directly deliver on the ambitions and priorities set out in *Make Yourself at Home* tourism plan for Belfast
- Utilise the strength of the city brand and its equity to position Belfast to compete on a national and international platform through the promotion of unique Belfast experiences
- Support tourism businesses, protect jobs and contribute to economic recovery
- Achieve tourism growth from high value markets in a sustainable and inclusive way
- Promote and stimulate stronger, fairer and more sustainable eco practices
- Engage with local communities and amplify local experiences & stories
- Utilise and invest in digital technology and communications to increase competitiveness
- Commit to longer term initiatives including signature events, 2024 International Year of Culture and UNESCO City of Music

3.17

Operational Targets for 2023-24

Based on projected levels of recovery in 2023/24, Visit Belfast is proposing the following targets for 2023/24 as agreed by their board:

Total Output	Target
Leisure Tourism Bed nights	200,000 bed nights
Leisure Tourism Day trips	150,000 day trips

	<table> <tr> <td>Business Tourism Bed nights</td> <td>86,000 bed nights</td> </tr> <tr> <td>Cruise Visitors</td> <td>375,000 pax & crew</td> </tr> <tr> <td>Visitor Enquiries</td> <td>735,000 enquiries</td> </tr> <tr> <td>Economic Impact</td> <td>2023-24 Target</td> </tr> <tr> <td>Leisure Tourism</td> <td>£45m</td> </tr> <tr> <td>Business Tourism</td> <td>£42m</td> </tr> <tr> <td>Leisure Trade</td> <td>£2m</td> </tr> <tr> <td>Cruise Tourism</td> <td>£22m</td> </tr> <tr> <td>Visitor Servicing</td> <td>£16m</td> </tr> <tr> <td>Visit Belfast Economic Impact</td> <td>£125m</td> </tr> <tr> <td>Budget</td> <td>£4.5m</td> </tr> <tr> <td>ROI</td> <td>£1:28</td> </tr> </table>	Business Tourism Bed nights	86,000 bed nights	Cruise Visitors	375,000 pax & crew	Visitor Enquiries	735,000 enquiries	Economic Impact	2023-24 Target	Leisure Tourism	£45m	Business Tourism	£42m	Leisure Trade	£2m	Cruise Tourism	£22m	Visitor Servicing	£16m	Visit Belfast Economic Impact	£125m	Budget	£4.5m	ROI	£1:28
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3.18	<p>A detailed business plan has been submitted and reviewed by officers. The targets outlined will form the basis of key performance indicators for Council's 2023/24 funding agreement with Visit Belfast. Regular monitoring against targets will be included and these key performance indicators will relate to the trajectory for recovery and align with the implementation phases for Council's new tourism plan. This provides a basis for more effective monitoring of performance and will be subject to annual review and renewal with necessary break clauses included.</p>																								
3.19	<p><u>Financial & Resource Implications</u></p> <p>In the current financial year, Belfast City Council's funding arrangement with Visit Belfast is £1,997,465. An allocation of £2,035,710 has been set aside within the Departmental estimates for the financial year 2023/24.</p>																								
3.20	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>No specific equality or good relations implications. Visit Belfast also works with councils outside of Belfast, as part of the Regional Tourism Partnership.</p>																								
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4.1	Appendix A: Visit Belfast Presentation of Business Plan 2023/24																								