



<b>Subject:</b>	Make Yourself at Home - Tourism Plan - Priorities 2023 / 2024
<b>Date:</b>	5 <sup>th</sup> April 2023
<b>Reporting Officer:</b>	John Greer, Director of Economic Development
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<b>Restricted Reports</b>	
<b>Is this report restricted?</b>	<b>Yes</b>
<b>If yes, when will the report become unrestricted?</b>	<input type="checkbox"/> <b>No</b> <input checked="" type="checkbox"/>
<b>After Committee Decision</b>	<input type="checkbox"/>
<b>After Council Decision</b>	<input type="checkbox"/>
<b>Some time in the future</b>	<input type="checkbox"/>
<b>Never</b>	<input type="checkbox"/>

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

<b>1.0</b>	<b>Purpose of Report or Summary of main Issues</b>
1.1	The purpose of this report is to provide Members with an update for approval on the Year 2 Action Plan (2023 /2024) for Tourism Plan for Belfast - <i>Make Yourself at Home</i> and to provide an update on the Council annual events programme and bids for large-scale events.
<b>2.0</b>	<b>Recommendations</b>
2.1	Members are asked to:

	<ul style="list-style-type: none"> <li>• Note the contents of this report and provide approval for Officers to progress with the Year 2 Action Plan, as detailed including the priorities as set out at Appendix 1 including associated budgets.</li> <li>• Note the outline plan for Lord Mayors Days</li> <li>• Approve interim funding of £25,000 each to Fáilte Feirste Thiar and EastSide Tourism from existing organisational budgets.</li> <li>• Approve the hosting of a EUROVISION viewing event in 2RA to be funded from existing budgets</li> </ul>
3.0	<b>Main report</b>
3.1	<p>The purpose of the <i>Make Yourself at Home</i> Tourism Plan is to:</p> <ul style="list-style-type: none"> <li>• Deliver on the tourism priorities set out in the <i>Belfast Agenda</i> recognising the importance of tourism to <i>Growing the Economy</i> and <i>City Development</i>.</li> <li>• Align to the ten-year cultural strategy, <i>A City Imagining</i>, in order to ensure that tourism development supports cultural development and is based upon an authentic and sustainable Belfast offer.</li> <li>• Support economic and social recovery in the context of COVID-19 including stabilisation, recovery and growth with the opportunity to build back better.</li> <li>• Provide strategic context to the Belfast Region City Deal that sets out wider city priorities to ensure Belfast's appeal internationally and ability to attract out of state visitors.</li> </ul>
3.2	<p><b>Tourism Growth</b></p> <p>Despite significant growth and the success of flagship projects such as Titanic Belfast there is still a gap in scale and maturity of the local industry when compared with other regions. Notably, Northern Ireland lags behind UK regions and Republic of Ireland with respect to tourism as a driver for job growth. However, the positive trajectory in place before Covid-19 had identified tourism growth as both a feasible and a necessary part of inclusive economic growth. The challenge for any tourism development plan is to create a sustainable model that continues to support the growth that is essential for city success and the creation of jobs.</p>
3.3	<p>Belfast's tourism and hospitality sectors directly support 19,300 jobs, one third of the sector in Northern Ireland. Key tourism sectors such as Accommodation and Food Services, Arts, Entertainment and Recreation and finally Transportation.</p>

3.4	The hospitality sector is an employment - intensive one, supporting a disproportionate number of jobs compared with the average sectoral GVA: jobs ratio. Between 2013 and 2019 employment in Accommodation and Food Services in Belfast increased by 18.2 percent, compared with 8.5 percent growth in the city's total employment.
3.5	It was in this context that Tourism NI set the ambitious target of doubling the value of the tourism industry to £2 billion by 2030. A key element of this opportunity further reinforced by ambitions of the Belfast Region City Deal was getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region.
3.6	The emerging 'Belfast Agenda' refresh (new tourism targets tbc) notes the importance of Belfast being a 'culturally vibrant' city which the Tourism Plan is a significant contributor to with cross cutting priorities of <i>Inclusive Growth and Anti-Poverty</i> and <i>Sustainable and Economic Growth</i> .
3.7	The Draft Economic Strategy for Belfast identifies an increase the value of Tourism in Belfast from £417 million in 2019 to £800 million by 2030. Belfast is the gateway to tourism in Northern Ireland and generates 40% of the region's tourism spend. The current challenge is the need to develop a greater range of quality tourism products that will attract more visitors and encourage them to stay for longer.
3.8	<p><b>Tourism Recovery</b></p> <p>As NI recovers from impact of Covid-19 on tourism with the aim to build back to pre-pandemic levels by 2024, Belfast as the regional driver will be hugely significant to this growth ambition, both in terms of visitor spend and the creation of new jobs. It is therefore imperative that our city break destination is developed in a strategic way which maximises the economic benefits that can be derived from tourism for local businesses and communities, as well as increasing visitor numbers and spend and improving overall satisfaction levels. While full year statistics for 2022 - 23 are not yet confirmed, 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.</p>

3.9	<p><b>10 - Year Plan</b></p> <p>The <i>Make Yourself at Home</i> Tourism Plan sets out a vision for the future of tourism in the city that is centred on a people-based and sustainable model of development with a focus on:</p> <ul style="list-style-type: none"> <li>• Increasing the coherency of the Belfast experience</li> <li>• Supporting quality authentic products</li> <li>• Developing skills</li> <li>• Strengthening the city’s position through marketing and communications</li> </ul>
3.10	<p><b>The approach</b></p> <p>The past two decades have given rise to a number of trends within tourism development. This has included the popularity of approaches such as cultural tourism, green tourism or local tourism. What each of these approaches and associated models have in common is an increasing awareness that sustainable forms of tourism must respect the local context and support the economic, social, environmental and cultural values of a place.</p>
3.11	<p>In the context of Belfast, even before COVID-19, this is a complex proposition. The city requires further growth with a clear international agenda and need to continue to attract and grow out of state visitors. The Tourism Plan seeks to set out how this growth can be achieved in a responsible and inclusive way recognising that the city’s greatest asset is its people.</p>
3.12	<p>The plan sets out a shared vision for tourism in the city and is supported by 4 strategic themes and three of catalyst projects. The strategic themes are:</p> <ul style="list-style-type: none"> <li>• Grow Belfast</li> <li>• Experience Belfast</li> <li>• Position Belfast</li> <li>• Sustainable Belfast</li> </ul>
3.13	<p><b>Strategic Themes</b></p> <p><b><i>Strategic theme 1: Grow Belfast</i></b></p> <p><i>Make Yourself at Home</i> identifies the role of tourism in city recovery including the need for stabilisation of the tourism sector and the requirement for further growth in Belfast. This includes:</p> <ul style="list-style-type: none"> <li>• Strategic context and evidence-based proposition that Belfast acts as a catalyst for the region.</li> </ul>

- Measurement of the attractiveness of the city as a destination and how this plays a key role in maximising the economic impact of each visitor by increasing average length of stay and daily spending levels.
- Priority areas for investment e.g., catalyst projects.
- Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.

3.14

As part of the Year 1 Action Plan for Make Yourself at Home, the following has been delivered against the theme of *Grow Belfast*:

- Management of Visit Belfast contract in respect of marketing, destination management and visitor servicing - to deliver on increased visitor numbers staying longer and spending more, thereby supporting tourism jobs in Belfast.
- Delivery of Conference Subvention Programme to assist in winning conferences and business events for Belfast.
- Delivery of an Accessible Tourism Programme to improve the visitor experience and value of the 'purple pound'. This focused on a programme of education and training including an engagement session with 40 businesses (Visit Belfast) members, a 'Living Library' training session for businesses to learn from people with disabilities and a series of 'Be Communication Confident' training videos for tourism / events organisations to access at own pace and in own time.
- Implementation of Food and Drink Tourism plan to increase associated spend and improve experience, while strengthening Belfast's position as a food and drink destination - therefore supporting the sector to be sustainable and economically viable. A Food and Drink Network Committee has been established including cross-sectoral representation within the city. The first year of the Action Plan has been delivered and has focused on 'Focus on Food' conference which attracted 260 delegates and included a producer zone, keynote speakers (including food columnist for The Guardian, Grace Dent), positioning exercise, audit of photography and finally an audit of Council assets with regard to public-facing Council-managed assets. Funding was also secured in-year from Tourism NI and DAERA to uplift Council budget and associated activity.
- Global Destination Sustainability Index (GDSI) application resulting in elevation of Belfast as a business events destination to 8<sup>th</sup> position in the world - ensuring Belfast is globally competitive in securing conferences and business events for Belfast, resulting in associated economic benefit / sectoral support.

	<ul style="list-style-type: none"> <li>• Ongoing scoping of the Neighbourhood Tourism Investment Programme to support development of cultural tourism products, which promote enhanced visitor footfall, dwell time and spend across the city's neighbourhoods and extend tourism's economic benefits to communities throughout the city.</li> </ul>
3.15	<p><b>Strategic Theme 2: Position Belfast</b></p> <p><i>Make Yourself at Home</i> sets out a dynamic model for city positioning that strengthens Belfast's role as the gateway to the region in a way that responds to key markets including:</p> <ul style="list-style-type: none"> <li>• Business Tourism and sub-sectors within this group.</li> <li>• Leisure tourism target markets including - geographic considerations and the visitor journey.</li> <li>• This theme also takes forward a new approach that pushes beyond traditional marketing methods towards enabling the people creating the Belfast experience to tell their story.</li> </ul>
3.16	<p>As part of the Year 1 Action Plan for <i>Make Yourself at Home</i>, the following has been delivered against the theme of <i>Position Belfast</i>:</p> <ul style="list-style-type: none"> <li>• Ongoing work with Visit Belfast, Tourism NI and Tourism Ireland to ensure Belfast is positioned as a Gateway to Northern Ireland and a must-see urban destination on the island of Ireland by capturing GB and ROI city break market and attracting greater share of Out of State visitors to Ireland- primarily through contract management of Visit Belfast.</li> <li>• Through Neighbourhood Tourism Investment Programme scoping activity - supporting the work of Belfast Stories in supporting organisations to tell the key stories.</li> </ul>
3.17	<p><b>Strategic theme 3: Experience</b></p> <p><i>Make Yourself at Home</i> identifies the importance of experiential priorities including:</p> <ul style="list-style-type: none"> <li>• Experiences that can be brought to life through the development of an optimal mix of 'anchor' and ancillary products that get people into an area and keep them there.</li> <li>• Encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places.</li> </ul>

<p>3.18</p>	<ul style="list-style-type: none"> <li>• prioritises delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.</li> </ul> <p>As part of the Year 1 Action Plan for Make Yourself at Home, the following has been delivered against the theme of <i>Experience Belfast</i>.</p> <ul style="list-style-type: none"> <li>• Working with the industry to encourage the development and delivery of quality visitor experiences including securing Tourism NI product development funding for new products such as Ceili at the Castle, Music Tours and music workshops.</li> <li>• Ongoing scoping of Neighbourhood Tourism Programme - working towards aim of increased footfall, dwell time and spend in neighbourhoods with associated economic and employability benefits.</li> <li>• Ongoing scoping of enhancement of the visitor experience at Council-owned assets including Belfast Zoo, Belfast Castle, Tropical Ravine, City Cemeteries, Malone House and City Hall to ensure an action plan is developed for future implementation which creates synergy with the city's 'Belfast brand' and Tourism NI 'Embrace A Giant Spirit' brand to deliver on experiential tourism.</li> </ul> <p>The Tourism Plan identified the need for improvements in connectivity and accessibility through signage, wayfinding and interpretation which requires a scoping exercise to be undertaken, subject to budget approval in Year 2.</p>
<p>3.19</p>	<p><b><i>Strategic theme 4: Sustain Belfast</i></b></p> <p>Members will be aware that Belfast signed up to this benchmarking following Committee approval in August 2020. The Global Destination Sustainability Index is the world's leading benchmarking and performance Index for cities, their events and their visitor economy. Its purpose is to engage, enable and inspire cities to become more sustainable places to visit, meet and thrive in. In addition to benchmarking a city's environmental strategy and social sustainability performance, the GDS-Index assess criteria that are industry specific: industry supplier support (restaurants, hotels, conference centres) and convention bureau strategy and initiatives.</p>
<p>3.20</p>	<p>Since 2019, over 60 cities have started the process of benchmarking and assessment. The goal is to have 300 cities collaborating by 2023. The Index is based on 69 Indicators broken down into four categories:</p> <ul style="list-style-type: none"> <li>• City Environmental Performance</li> </ul>

<p>3.21</p>	<ul style="list-style-type: none"> <li>• City Social Performance</li> <li>• Supplier Performance</li> <li>• Destination Management Performance</li> </ul> <p>Belfast has now completed a third year of benchmarking resulting in significant improvement taking our place within top 20 cities. A series of related recommendations are included in <i>Make Yourself at Home</i>. A number of these relate to Visit Belfast’s role as the Destination Management Organisation (DMO) and Visit Belfast have already made significant progress in implementing these as part of their current funding agreement with a commitment to build on this on a multi-annual basis.</p>
<p>3.22</p>	<p>As part of the Year 1 Action Plan for Make Yourself at Home, the following has been delivered against the theme of <i>Sustain Belfast</i>.</p> <ul style="list-style-type: none"> <li>• Ongoing work with Visit Belfast on Global Sustainability Index and Tourism NI on regenerative tourism - improvement to 8<sup>th</sup> position in the world.</li> <li>• Green Tourism Certification - working with the industry to increase their sustainability credentials which has resulted in 80% of hotel rooms in Belfast being accredited, ongoing work with a range of tourism providers to gain bronze or move upwards to silver certification and working on a cruise sustainability plan for Belfast.</li> <li>• Working with key stakeholders such as Tourism NI and Visit Belfast to ensure that sustainability is embedded in tourism products and events across the city.</li> <li>• Sustainability fully integrated in all tourism / event planning.</li> </ul>
<p>3.23</p>	<p><b>Catalyst Projects</b></p> <p>All four of these strategic themes are underpinned by the need to support inclusive economic growth and to differentiate the Belfast offer in an increasingly competitive global marketplace. A fifth strand to the plan considers key strategic opportunities that could bolster investment in the sector in order to support recovery and future growth. These are catalyst or accelerator projects and are outlined below.</p>
<p>3.24</p>	<p><u>Catalyst Project 1: Our Place – support for local tourism</u></p> <p>The Neighbourhood Tourism Framework is under-way and will be brought to Committee in June 2023 for approval. The Tourism Team also continue to work with colleagues across Council to ensure targeted investment in tourism through the Neighbourhood Regeneration Fund.</p>



3.25	<p><u>Catalyst 2: Make Yourself at Home</u></p> <p>Strategic and operational planning is ongoing for the delivery of the One Young World event in October 2023. Other major bid-for events have been progressed during the financial year 2022 / 2023 including the Fleadh Cheoil and the European Football Championships in 2028 with a decision due in September 2023). Work also continues across the tourism, culture and events team to prepare for Year of Culture in 2024. A detailed report will be brought to committee in June regarding 2024 and next steps and lessons learnt regarding our bid to host the Fleadh Cheoil.</p>
3.26	<p><u>Catalyst Project 3: Our Stories</u></p> <p>The Tourism and Events Teams continue to work with colleagues in Belfast Stories to connect to local tourism product development and infrastructure through a hub and spoke model. Importantly the Hub will be an exemplar for responsible and sustainable tourism demonstrating the principles set out in the ten-year plan. Through the focus on Belfast Stories, the project will also be transformative for the positioning of the city. The development programme for this project as part of BRCD is fully aligned to this tourism plan with cross-cutting priorities and synergies.</p>
3.27	<p><b>Implementation</b></p> <p>The ongoing success of the Tourism Plan requires ongoing review and delivery. To support this a number of key early actions have been identified for action in Year 2:</p> <ul style="list-style-type: none"> <li>• Setting up of proposed governance and partnership model to drive the implementation of <i>Make Yourself at Home</i>.</li> <li>• Scoping short and long-term investment priorities and financing strategy including tailored action plans to address areas of priority.</li> </ul>
3.28	<p>Appendix 1 sets out priority actions for Year 2 of the <i>Make Yourself at Home</i> Tourism Plan.</p>
3.29	<p><b>City Connections</b></p> <p>In particular, Members will be aware that for the past number of years Council has supported two specific organisations (Fáilte Feirste Thiar in West Belfast and EastSide Tourism in East Belfast) to deliver a City Connections programme. It is proposed City Connections is replaced by the new Neighbourhood Tourism Investment Programme which will be open to organisations from across the city. In order to support transition and given that the new programme will not be operational until later in the year it is proposed that</p>

	<p>£25,000 each (50% of previous annual investment) is allocated to these organisations. If approved this will be sourced from existing organisational budgets.</p>
3.30	<p><b>City Events</b></p>
	<p>Members will be aware that significant work has taken place in recent years to realign City Events with Council's wider cultural and tourism ambitions. This has included a renewed focus on working in partnership and developing programmes that support the local cultural sector and represent an authentic Belfast Experience.</p>
3.31	<p>Included in Appendix 1 are the proposed events for 2023/24. Further detail on approach and programmes will be presented to Committee at relevant points throughout the year. Members will note that there are currently no plans to deliver Halloween in 2023. It is proposed that this event is reviewed in line with the development work that has taken place on other events. This should include options for city events to represent greater cultural diversity within the city and how a partnership model could be developed. An update will be presented in due course.</p>
3.32	<p>In approving the 2023-2024 programme, including ad hoc events, Committee is also asked to approve officers to enter into any license agreements or SLAs required for the successful delivery of these events.</p>
	<p><u>Eurovision</u></p>
3.33	<p>Members are asked to consider 2 Royal Avenue potentially hosting a ticketed live showing of the EUROVISION final. The event itself would feature compere / live performances, screens / PA, Stage and Lighting Contractor. The venue could have an approximate capacity of 250-300 depending on final layout. It is expected that organising and hosting the event would come at a cost of approximately £7,500 which would be found from existing departmental budgets.</p>
	<p><u>Lord Mayor's Day</u></p>
3.34	<p>Lord Mayor's Day will take place on Saturday 22 April 12-5pm in the grounds of Belfast City Hall, with satellite activity in 2 Royal Avenue. The free, all-ages event includes live music, dance, aerial circus and street theatre performances, have a go multi-sports activity, make your own multi-cultural arts and crafts, Carnival games stalls, drop-in circus workshops, creative writing activities, and Age Friendly Belfast activities. The theme for 2023 is 'Celebrating Belfast'. The event budget is £42k which is sourced from existing departmental budgets.</p>

3.35	<p><u>Financial &amp; Resource Implications</u></p> <p>There are currently no immediate new financial implications to this report. Appendix 1 sets out a breakdown of budget against programmes of work to be allocated from existing departmental budgets. Further detail on proposals for investment in local tourism will be presented to Committee in due course.</p>
3.36	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> is subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). A specific screening has been carried out on this associated tourism plan and was included as part of the consultation exercise. Mitigating actions have been considered as part of the implementation plans. Catalyst projects such as Belfast Stories will be subject to a separate Equality Impact Assessment. It is also anticipated that should any investment programmes emerge from this plan these will be subject to further equality screening.</p>
4.0	<p><b>Appendices: Documents attached</b></p> <p>Appendix 1 – Tourism and Event Priorities 2023 /2024</p>