



Belfast City Council

Report to: Special Development Committee

Subject: Sunday Tourism Product

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Reporting Officer: Marie-Thérèse McGivern, Director of Development, ext 3470

Contact Officer: Shirley McCay, Head of Economic Initiatives, ext 3459
Piér Morrow, Acting Tourism Development Manager, ext 3582

Relevant Background Information

Members will be aware that the Cultural Tourism Strategy, *Developing Belfast's Opportunity*, outlines the need to develop the quality of the visitor experience in Belfast on Sundays and enhance and promote the current product offering. NI Tourist Board Research and feedback from the tourism sector and Welcome Centre, see **Appendix 1**, found that virtually all identified a problem on Sundays. Members may also be aware that media coverage surrounding the Lonely Planet announcement in November 2006 commented on the need to develop the Sunday offer. The long-term closure of a number of city attractions and the closure of the cultural venues significantly adds to the need to create a critical mass of activity for the short-break market.

Key Issues

Research from all sectors shows the current level of Sunday activity is inadequate and unsatisfactory to visitors. Visitors are complaining that there is nothing to do on Sundays, that there is poor public transport and they do not have a full picture of what is currently available. Cruise ship visitors and guests staying in hotels are being actively encouraged to leave Belfast to visit the Causeway Coast or Mourne Mountains, which is an obvious loss to the Belfast economy. **Appendix 1** outlines research and feedback relating to gaps in provision of product on Sundays, for the short break and conference sectors, under the following headings:

- Cultural Tourism
- Feedback from Tourism Sector
- Feedback from Cultural Sector
- NI Tourist Board Research
- Media Coverage (transcript of UTV Live Sunday coverage, Lonely Planet)
- Summary

The report recommends raising awareness of the current cultural tourism offer and coordinating product development. This is to enhance the quality of the visitor experience by conveying the range of leisure activities which people might choose to pursue on Sundays as there is a lack of knowledge regarding current offering.

We respectfully recognise that there will be residents, visitors and organisations who wish to uphold Sunday Observance. Organisations not wishing to partake or contribute can opt out of offering cultural activity if they so wish. Activities will concentrate on areas that are non-residential and much of the proposed activity, particularly in relation to art, music and family tourism, is free of charge.

The report also recommends including Christian Heritage: organised walking tours detailing Christian, architectural and historical heritage and liaising with Churches and Chapels to determine times of services and access and market to cultural tourists.

Appendix 2 is a summary of actions that will be undertaken with identified partners to raise awareness of the current cultural tourism offer and coordinate product development in order to enhance the quality of the visitor experience. Feedback has shown that cultural tourism providers would increase Sunday initiatives and be proactive in their programming if they had marketing support. A marketing strategy to domestic and out-of-state visitors is crucial to the success of any Sunday Product Development as research shows that there is a lack of knowledge regarding current offering.

The programme seeks to create awareness of and enhance current Sunday product offering in order to improve the quality of the visitor experience and contribute to the competitive success of Belfast. It will also seek to co-ordinate information in partnership with the Belfast Visitor and Convention Bureau on what is available in Belfast on Sundays (including details of public transport) in order to inform visitors of Sunday cultural tourism offering. Other sources of support will be explored in order to develop programme in **Appendix 2**.

Resource Implications

Financial

Cost of Pilot Sunday Product Development Recommendations, £46,250

Recommendations

It is recommended that Members note the contents of this report.

Documents Attached

Appendix 1: Research

Appendix 2: Recommendations

Appendix 1

Appendix 1: Research

Cultural Tourism

Cultural Tourism, widely regarded as the fastest growing and most sustainable aspects of the tourism industry, is central to the Tourism Development Unit's strategy. Defined as the movement of people for essentially cultural motivations, cultural tourists will travel extensively to see a broad range of attractions, including study tours, performing arts, cultural tours, festivals, historic sites and monuments, and folklore. The cultural tourist is looking for things which are specifically indigenous and mark the destination out from others. They tend to spend more than regular tourists and now account for 37% of all world travel. The experience economy - a key motivator for cultural tourists is self fulfilment and 75% desire an understanding of local culture. They are more demanding and expect an open 24 hour society (lunchtime performances, early evening and late night sessions and Sundays). ***Further details can be found in the Future Foundation's Cultural Tourism Research November 2007.***

Feedback from Hospitality Sector

Survey of Hotels, Restaurants and Bars.

All hotels reported a serious problem on Sunday mornings, between the hours of 9.30am and 1pm, with many guests complaining that there was very little to do and that public transport was also very poor. It was suggested that if attractions opened earlier they would eventually find a market, especially as the tourism market grows, though this might not happen immediately. It was said that while Belfast has an excellent offering for tourists on Friday and Saturdays, that the problems of Sundays might eventually impede the growth of tourism.

It was pointed out that many guests leave Belfast on Sunday afternoons and that Sunday morning is their last period to enjoy Belfast, therefore it is not a good final memory. Several hotels actually recommend that guests leave Belfast and use Sunday to tour the Causeway Coast and Mourne Mountains. Also recommended was the Ulster Folk and Transport Museum.

Though the morning was the main problem, Sundays as a whole were perceived as pretty bleak, with little happening and a shortage of attractions for the visitor. The long-term closure of the Ulster Museum and the closure of the City Hall is seen as significantly adding to this problem.

Poor public transport throughout Sunday was seen as a big problem and one that needs attention, with some hotels telling their customers they are better off getting taxis. Main recommendations would be to organise family-orientated events in places like the Botanic Gardens, and that outdoor live music in the city centre would be helpful. Some hotels recommended that cafes and restaurants open earlier on Sundays as there is nowhere for people to enjoy a cup of coffee, especially on Sunday mornings.

Virtually all accommodation providers agreed that a brochure/leaflet/flyer on what to do in Belfast on Sundays would be a great help, especially if public transport details of how to get to each place were included. The Welcome Centre being open on Sunday was greatly welcomed by those who knew about it.

In summary, the accommodation sector universally see Sundays as a problem and Sunday mornings as a particularly serious one that needs to be addressed. More information would be welcome and more family orientated events, more attractions and better public transport would all be welcomed.

Feedback from Cultural Tourism Sector

Members will be aware that regular cultural tourism networking events are held in order to develop communication between the following sectors: accommodation, heritage organisations, promoters, tour operators, tour guides, bars and restaurants, festivals, performing arts, Government Agencies, venues and visitor attractions. At the most recent cultural tourism networking event held on 26 February 2008, the cultural tourism sector asked to consider the issue of Sundays. Feedback from the debate which was facilitated can be found below:

Cultural Tourism Networking Event 26th Feb 2008 FEEDBACK

1 Do you feel that Belfast needs cultural tourism development on Sundays?

- A yes **100%**
 B no
 C if yes, please expand

Name, Organisation	Comment
Ulster Orchestra	Ulster Hall concerts with the Ulster Orchestra
Anon	It's a no brainer: economic, quality of life, international standing!
Anon	Sunday performances in partnership with venues
Ormeau Baths Gallery	The audience is there for Sunday tourism, there just isn't a lot of choice.
Belfast Visitor & Convention Bureau	Very few productions open particularly Sunday mornings and demand for things to do is increasing all the time. Can the legislation be changed? Good suggestions made today.
Faillte Feirste Thair	We are behind the times if we are to compete we must change with the times.
Belfast Exposed	Changes are needed at political/policy level; more co-ordination & partnership within cultural sector; investment to start up Sunday opening.
Cahoots NI	Events, activities & facilities – not just retail. Free events & activities. "Taster" events for all age groups.
NI Tourist Guide	For visitors only here for the weekend, you need two full days of choice.
NI Tourist Guide	Tourists visiting the city at weekend require facilities open all day Sunday.
John Hewitt	Belfast is very much behind the times where Sunday is concerned; we need to be open for the growing number of tourists.
Grand Opera House	Development of ideas and suggestions discussed today & implementation of ideas.
Craft NI	Essential - it is the one day people want to relax and unwind and what better way could there be to do that than by engaging in and enjoying art.
Black Box	Belfast is being left behind by other tourist destinations. The Sunday market is one where you have lots of tourists and lots of local people with spare time.
Community Arts Forum	Nothing to do, particularly on Sunday mornings, for tourists and for locals – need vibrancy across the city, especially in public spaces – need to be animated.
Wellington Park Hotel	As much for LOCAL people as tourists there is very little to do on Sunday mornings.
Replay Productions	There needs to be a real strategic approach to the issue of Sundays – funding to ensure the sustainability of opening, transport to ensure accessibility, audience development with locals as well as tourists.
C21 Theatre Company	The market is there and growing.

Murphys Travel	Mindset in Europe is that cultural activities happen on Sunday – Monday official closing day; tourists do not necessarily want to shop on Sunday, but galleries, museums and public buildings very important (City Hall, etc).
Belfast Civic Trust	Need to provide for locals & visitors on this most important day of the week. Sunday walking tours on historic Belfast.
Old Museum Arts Centre	It's core to developing audiences for cultural events as well as tourists for the city; needs to be both local & tourist market.
Queen's University Belfast	Agree with points made in wind-up session.
Oh Yeah	Obvious need.
Creative Media Partnerships	Sunday for many (locals & visitors) the obvious day on which to do cultural/relaxation activity – there needs to be much more choice.
NITB	Currently not enough to do esp for tourists on weekend breaks – need enough to sustain interest over entire weekend
Feile an Phobail	Need to change policy with BCC taking the lead. Bring in other public bodies, market it properly. To match European cities & provide locals/tourists with something educational or beneficial in terms of leisure time to occupy themselves on Sundays.
Jury's Inn Belfast	Especially mornings, embarrassing to tell guests there is nothing open until 1 pm! Good ideas today – hopefully they will be acted upon.
Belfast Civic Trust	In moderation and if transport is available.
Northern Ireland Tourist Board	Serious lack of opportunities for locals/tourists on Sundays; very little “buzz” about the city other than retail.
Coiste Political tours	Most of the out of state visitors are used to being able to do things on Sundays, why should we be any different; the potential is there, we have the goods to deliver, we must move with the times.
Golden Thread Gallery	Pending funding being made available to a currently under-funded sector.
Bruiser Theatre Company	We need to join the 21 st century on this.

Would your organisation be interested in contributing?

A yes	39	93%
B no	0	

Belfast Welcome Centre

The Belfast Welcome Centre currently handles an average of 400 visitors a Sunday all year, rising to about an average of 600 per Sunday over peak summer months during a 5 hour period. Feedback shows that apart from the cities parks, staff are currently limited to offering Belfast Zoo, Belfast Castle, the Belfast Eye (temporary) and the City Sightseeing Tour, but find that during the period from 10am until 1pm the city centre is closed. As a strong weekend break market is developing in Belfast, there is need to have a full product range for out of state visitors and the domestic market in line with European and leading UK City break competitors, and to reinforce marketing campaign that Belfast is a vibrant and happening city.

NI Tourist Board Research

Both qualitative and quantitative research carried out by NITB reveals a concern for lack of Sunday product offering eg: Tourism Visitor and Domestic Holiday Attitude Survey 2007. A further independent survey carried out by TTC identifies Evening and Sunday Economy as the second most important key product gap, following only more hotels needed outside Belfast:

Island of Ireland Market Review

Answering the questions:

- 1. Why does NI appear to be losing share?*
- 2. What is the 'domestic' tourist thinking & looking for?*
- 3. What barriers to short breaks in NI?*
- 4. Who & Where are NI's best prospects?*
- 5. Is the message & communication on target?*
- 6. How best to make it happen - what Actions ?*



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'Product Gaps' vs. Market

- Hotels outside Belfast – need for more 'destination/resort hotels with good leisure facilities
- Evening & Sunday economy
- Public transport
- Visitor information
- Access to golf courses
- Exhibition Centre
- Leisure Customer focused service delivery

NITB RESPONSE

- Product development strategy
- Advice re 'Best practice'
- Tactical co-op marketing



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Media Coverage (transcript of UTV Live Sunday coverage)

Much travel press coverage has surrounded the Sundays in Belfast issue, including the Lonely Planet when they announced Belfast as one of the Top Ten Cities on the Rise. Please see below transcript from UTV coverage.

UTV Live, Monday 21 May 2007

Title: Sunday Mornings in Belfast

UTV Reporter Alison Fleming: It's just after 9 o'clock on Sunday morning and as you can see behind me here Belfast City Centre is absolutely dead. Now if you were home you would be having your breakfast or reading the papers, but what if you were a visitor here? You would want to see as many of the sights as you possibly could. So it kind of begs the question what exactly is there to do in Belfast on a Sunday morning? Well who better to ask than the concierge at the city's most famous hotel.

Hugh Phillips (Europa Hotel): You get them coming down (guests), "Hugh where are we going today?" ...you had your breakfast, you want to go out and see a bit of Belfast, you can't, it's closed. Main town, city centre is closed to one o'clock and by that time the guests are away."

Alison: And if Hugh's finding it tough bear a thought for the poor tourists. "You're from Germany so compared to your home city how does Belfast measure up for a Sunday morning?"

German tourist no.1: "We are very surprised that everything is closed and they told us that that cafés don't open, won't open before one o'clock and this is very strange."

German tourist no.2: "We are a little bit disappointed because there are very little breakfast places...Also we wanted to go to the Ulster Museum, it's closed now."...

Alison: The most popular Sunday morning event in Belfast, in fact one of the only ones, is the open top bus tour. Paul, you're one of the tour guides with the sightseeing buses and really you appear to have the Sunday morning tourist market in Belfast absolutely stitched up. There doesn't appear to be anything else. What do people say to you on a Sunday morning when they're getting on the tour?

Paul McIvor (City Sightseeing tours): "Well we do actually have the monopoly here on a Sunday, unfortunately it's not the way we would have liked it. We find that tourists find it very strange walking around Belfast on a Sunday morning and it's like a ghost town, you can't even get breakfast. We'll we have McDonald's open obviously but apart from McDonald's and ourselves and a small café around the corner, we're the only people that are open so truly frustrating for the tourist, they tend to leave their hotel on a Sunday morning quite early as its their last day in the city to try and make the most of it but unfortunately there's nothing for them to do. It's a bit of a problem."

Alison: And it seems the sightseers agree.

Scottish tourist no.1: "It's dead...basically its just, people are walking about wondering what we could do. Glasgow is absolutely heaving on a Sunday morning."

Scottish tourist no.2: "Everything seems to be open by about 11 o'clock in Glasgow, you're kind of limited to one thing here which is the sightseeing bus. So that's about it."

Alison: Are you surprised by it?

Scottish tourist no.1: "As I said, we've been before and I said remember its dead on a Sunday but that was a while ago and I thought it might have been a bit busier, but I was kind of surprised that there's just nothing to do basically. This is it."

Alison: And while a few businesses are starting to take advantage of this relatively untapped market, there's still a long way to go to establish a Sunday morning culture here in the city similar to those of other European capitals.

Summary

Research from all sectors shows the current level of Sunday activity is inadequate and unsatisfactory to visitors. The main areas of concern are from 9.30am and 1pm as short-break visitors leave Belfast on Sunday afternoons - Sunday morning is their last period to enjoy the city. Visitors are complaining that there is nothing to do, that there is poor public transport and they do not have a full picture of what is currently available. Cruise ship visitors and guests staying in hotels are being actively encouraged to leave Belfast to visit the Causeway Coast or Mourne Mountains, which is an obvious loss to the Belfast economy. The long-term closure of a number of city attractions and cultural venues significantly adds to this need to create a critical mass of activity for the short-break market.

Recommendations for raising awareness of the current cultural tourism offer and coordinating product development can be found in Appendix 2. This aims to:

- bring colour, vibrancy and generate much-needed footfall
- create awareness of the current cultural offering
- coordinate links between attractions and cultural organisations
- capture the essence of Belfast and reflect its distinctiveness
- enhance the quality of the visitor experience
- attract new people to the City
- be a crucial asset to the competitive success of Belfast

Appendix 2

Appendix 2: Pilot Sunday Product Development Recommendations

NB: Feedback has shown that cultural tourism providers would increase Sunday initiatives and be proactive in their programming if they had marketing support.

Subject	Lead Partner	Objective	Time
Cathedral Quarter	Belfast City Centre Management DSD Tourism and Cultural Sectors	<i>Formally approved by Committee on 7th March 2008:</i> Sunday Street Trading in Cotton Court, Hill St, Commercial Court (potentially Writers' Square) Arts - visual arts of all disciplines such as fine art, print, photography Crafts – such as jewellery, ceramics, sculpture, pottery, clothing Flowers and books. NB: Products to be original, locally produced and hand-made by professional, indigenous artists and designers	Weekly
	Kabosh	Create awareness of Sunday Theatrical Walking Tours of the History of the Cathedral Quarter	Weekly July - Sept
	Belfast Circus School	Create awareness of Summer Sundays street theatre in Cotton Court	Weekly June - Sept
	Black Box	Co-ordinate early afternoon readings	Weekly
	Oh Yeah Building	(See music)	Weekly
Christian Heritage	36 places of worship detailed in current Christian Heritage Guide Good Relations	Liaise with Churches and Chapels to determine times of services and access and market to cultural tourists. Organise walking tour detailing Christian, architectural and historical heritage.	Weekly

Art Tourism	Ormeau Baths Naughton Gallery Belfast Exposed Printmakers Workshop	Open city centre galleries which are in close proximity to accommodation providers. Galleries to programme complementary activity eg music, artists talks, film etc.	Weekly 10am – 5pm
	Belfast City Council Art Studios	Explore potential of Gallery on Belfast City Hall Railings subject to agreement by Policy and Resources Committee (see Merrion Square strategy)	Weekly 10am – 5pm
	Craft NI	Developing initiatives within the craft sector to tap into tourism market eg events, displays, listings, provision of space facilities	Weekly
	Belfast Exposed Printmakers Workshop Art Studios	Create awareness of taster workshops on photography, painting, printmaking and behind the scenes tours. Currently exists but programming is sporadic.	Weekly
Literary Tourism	BVCB NITB	CS Lewis Coach Tours	Weekly May – Sept 2pm
	Robbie Meredith	Literary Walking Tour	Weekly May – Sept 11.30am
	Arts Council	Explore opening of Seamus Heaney Centre and Linen Hall Library	Weekly 10am – 4pm
	Hoteliers	Co-ordinate readings from local writers in hotels who target the short-break market	TBC
Family Tourism	Young at Art Belfast Circus School Moving on Music Parks Dept Cahoots NI C21 Replay	Create awareness of current family-orientated events and develop live outdoor music in the city centre eg grounds of City Hall and Botanic Gardens (open Palm House) Ensure current activity eg 'What's on in Parks' is reaching cultural tourists	Weekly

	Queen's Film Theatre	Are already open on Sunday evenings, but will consider introducing family & non-family matinees if there is marketing support	Weekly
Music Tourism	Ulster Hall Ulster Orchestra Kabosh Oh Yeah BBC Queen's Sonic Studio Funding partners: NITB IKEA Translink	Belfast Music Coach Tour Start at the Ulster Hall (exhibition and live music) Tour of Belfast including Van Morrison sites Finish at Oh Yeah Building (exhibition and live music)	Weekly at 11am
	Grand Opera House Moving on Music	Opera House café to open from 10am and programme live music	Weekly
	Hoteliers	Co-ordinate live music – provide list of musicians and promoters	Weekly
Performances	Lyric Theatre Tinderbox Ransom NI Playwrights Network Jigsaw 25 Prime Cut	Short rehearsed readings (approx 45mins) Professional actors and local playwrights – classic and new Tinderbox Dramaturg to co-ordinate with all Belfast Theatre Companies	Monthly
Festivals	Feile an Phobail Belfast Children's Festival, Belfast Festival Cathedral Quarter Arts Festival, Open House, Cinemagic	Create awareness of all current providers who programme on Sundays and co-ordinate with hoteliers	Monthly

	Songwriters', Queen's, Film Festival etc		
Future Developments	City Hall Ulster Hall Waterfront Hall Ulster Museum MAC Lyric Theatre Crescent Arts Centre	Ensure that all buildings currently closed for refurbishment include Sunday opening and programming in future strategies	
General	BVCB Corporate Communications	A marketing strategy is crucial to the success of Sunday Product Development as research shows that there is a lack of knowledge regarding current offering. This will include co-ordinating activity and ensuring it is targeted at both domestic and out-of-state visitors, advertising, PR, e-marketing etc. Hoteliers require a weekly Sunday's What's On List. <i>Any campaign would include existing and new products.</i>	Ongoing
	Translink Waste Management Cleansing Belfast City Centre Management	Ensure basic facilities are available for tourists eg transport (in particular to the Zoo, Castle and Parks), toilets, coach parking etc.	Ongoing