



Belfast City Council

Report to:	Development Committee
Subject:	Presentation by Belfast Visitor and Convention Bureau of Draft Marketing and Visitor Servicing Plan 2009 to 2012
Date:	10 December 2008
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Relevant Background Information

Belfast Visitor and Convention Bureau

At the November Development Committee members agreed to receive a presentation from Gerry Lennon of the Belfast Visitor and Convention Bureau on their draft Marketing and Visitor Servicing Plan and to consider the Bureau's application for funding. **Appendix 1** includes a copy of the draft Marketing and Visitor Servicing Plan 2009-2012.

Tourism is a major success story in Belfast, reflected by the significant growth in tourism numbers and spend; investment by public and private sectors in the tourism infrastructure and the establishment of a strong presence on the international stage.

Key achievements include:-

Tourism to the city has more than quadrupled over the last 6 years to reach 6.9 million visitors in 2007 spending £313 million in the local economy. This included 1.4 million overnight stays of which 1.2 million were from out of state, an increase of 18% on the previous year.

Between 2000 and 2007 out of state overnight visitors grew by 144% compared to 26% in NI as a whole. Belfast accounts for nearly 60% of all out of state overnight trips to NI and circa 40% of out-of-state overnight spend. Up to 45% of all overnight stays in Belfast visit places outside of the City. Clearly Belfast is a draw and magnet for tourism to NI and generates substantial economic return for the wider region.

Of the 1.2 million out of state overall visitors, 40% were business tourists, 30% pure holiday tourism and 13% were visiting friends and relations (17% were not classified).

In 2007 Belfast secured 53 conferences equating to c.15,000 delegates generating over £7 million for the economy.

In 2008 Belfast welcomed 39 cruise ships equating to 64,000 visitors.

During 2007 the BWC, BIA TIC and GBBCA TIC handled a total of 540,000 enquiries.

2008 figures and performance analysis will not be finalised until February/March 2009. The major issue currently facing most industry sectors, including tourism, is the credit crisis and the downturn facing the global economy. Whilst there is no general consensus of opinion on what the exact impacts of the credit crisis will be, industry sources suggest that the tourism sector will lose some business from overseas visitors and business travellers, and from domestic tourism spending.

The projections were set against a 2007 baseline, and reflect the following average annual increases over 2008, 2009 and 2010:

- Overnight visitors to increase by an average of 7.6% per annum;
- Total visitors to increase by an average of 4.5% per annum;
- Revenue from overnight visitors to increase by an average of 4.5% per annum; and
- Total visitor spend to increase by an average of 4.5% per annum.

In addition to these overall projections, BVCB has also set the following departmental targets for 2009:

	2009
<p>Leisure Tourism To attract cruise ships to Belfast</p> <p>To implement above the line campaigns</p>	<p>41 cruise ships, 60,000 passengers & crew</p> <p>43,000 additional PHV from carrier campaigns 61% prompted recall 30% motivation to visit</p>
<p>Business Tourism To maintain the volume and value of conferences secured by BVCB</p>	<p>45 wins 10,000 delegates this year</p>
<p>Communications To implement the communications plans to deliver PR in main NI, ROI and GB markets</p>	<p>300 press welcomed £2.5m advertising equivalent 80m WOTS</p>
<p>Visitor Servicing Maintain current levels of enquiries at the three TIC's</p>	<p>540,000 enquiries</p>

At the time of writing the Business Plan, actual visitor statistics for 2008 were not yet available. However, on the basis of economic projections, occupancy levels for the current year to date and Tourism Ireland's most recent forecasts for 2008, it would seem likely that

actual visitor numbers and revenue will be below projections. However, until the 2008 actual statistics are released, Belfast City should maintain its original forecast for visitor numbers and revenue levels for 2010. Any revisions following the release and analysis of 2008 statistics will be made with the proviso that Belfast projections will continue to be challenging and stretching.

The focus of BVCB's integrated marketing, communications and visitor servicing plan will continue to be:

- the short break/City break markets for day visitors, overnight stays and cruises. The focus will be on maintaining the region's position and growth in Northern Ireland whilst actively targeting the Republic of Ireland, Great Britain, mainland Europe and North American direct access markets;
- the conference and business tourism market. BVCB will continue to promote the region for meetings, incentives, conferences and events, with a focus on the Association Conference Market.
- promoting Belfast's gateway role for visiting other regions in Northern Ireland and Ireland, mixing rural and urban product;
- Delivering effective and efficient visitor servicing to optimise the visitor experience through the operation of the BWC, BIA TIC and GBBCA TIC.

Financial support is being requested from the Development Committee to support the marketing and visitor servicing activities of the Bureau.

Marketing and Communications	£1,130,565
Belfast Welcome Centre	£471,505
Airport TIC's	£53,045
Domestic marketing and 'Whatabout' guide	£206,000

The achievement of the Bureau's objectives will be monitored through the establishment of benchmarking criteria, appropriate performance measurements and destination indicators which will be measured through the Belfast Tourism Monitor. Members will be aware that the Bureau undertakes additional activity including the promotion of the Council's Civic Events programme through a marketing campaign aimed at the domestic market. Furthermore the 'Whatabout' guide is produced to indicate up to date and accurate information on the events, entertainment and what's on programme for the City.

Members will be aware that the Belfast Welcome Centre has been in operation in Donegall Place since 2001 and that approval was granted to identify any future location of the Belfast Welcome Centre in order to prepare for the expiry of the current lease and the future visitor servicing and retail requirements of this gateway Tourist Information Centre. This is currently underway and a report will be brought to a future meeting of the Development Committee in 2009.

Resource Implications

£1,861,115 provided for within existing budgets

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Recommendations

<u>Belfast Visitor and Convention Bureau</u>
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It is recommended that Members approve:

- Funding of £1,130,565 towards the marketing activity of the Belfast Visitor and Convention Bureau payable in two instalments – April 2009 and October 2009. Funding of £471,505 towards the operation of the Belfast Welcome Centre payable in 2 instalments - April 2009 and October 2009.
- Funding of £53,045 towards the operation of the International and City Airport Tourist Information Centres.
- Funding of £206,000 towards the domestic marketing campaign and the What About Guide.

Key to abbreviations

BVCB – Belfast Visitor and Convention Bureau

PHV – Pure Holiday Visitors

WOTS – Weighted Opportunity To See

TICs – Tourist Information Centres

BWC – Belfast Welcome Centre

BIA TIC – Belfast International Airport Tourist Information Centre

GBBCA TIC – George Best Belfast City Airport Tourist Information Centre

Documents Attached

Appendix 1 - Belfast Visitor and Convention Bureau draft Marketing and Visitor Servicing Plan 1 April 2009 to 31 March 2012.