



## Belfast City Council

|                    |   |
|--------------------|---|
| Report to:         | Special Development Committee                             |
| Subject:           | Belfast Integrated Strategic Tourism Framework 2010–2014  |
| Date:              | 8 February 2010   |
| Reporting Officer: | Shirley McCay, Acting Director of Development, ext 3459   |
| Contact Officer:   | Kerrie Sweeney, Tourism, Culture & Arts Manager, ext 3586 |

### Relevant Background Information

In recent years, Belfast has built up a reputation as an international tourism destination. It has also become a key gateway for tourists visiting Northern Ireland and the whole of the island of Ireland. Latest figures suggest that visits to the City are worth up to £500m per year for the local economy, supporting 10,000 jobs in the Greater Belfast area. In 2008, the City attracted 1.6m staying visits, 5.5m day visits and 64,000 cruise passengers (and crew). Belfast has a new brand and a range of new or improved product coming on stream (City Hall, Titanic Signature Project, Ulster Museum, Ulster Hall, Lyric Theatre). Investment planned or underway in the City centre by both public and private sectors amounts to some £1 billion of projects with a further £0.7 billion outside the inner area is also at planning or implementation stage.

The Belfast Integrated Strategic Tourism Framework sets the direction of tourism development and marketing within the City over the next 5–10 years. Through a detailed action plan it will outline how we underpin the investment/success to date and deliver future growth. It was produced by TTC International, managed by a steering group comprising representatives from NITB, BCC and BVCB and chaired by Cllr William Humphrey.

The final draft strategy is attached as Appendix 1. Party briefings have been undertaken with all Parties during January 2010. A period of targeted consultation will follow after the Council meeting (with key delivery agencies e.g. DSD, DEL, Airports etc) and we intend to launch the finalised plan in late spring for the new season. The study is funded 50:50 by NITB and BCC.

NITB is also preparing the Northern Ireland Tourism Strategy for the same period. The intention is to ensure both Strategies dovetail and complement one another. A similar approach is being adopted for Derry/Londonderry.

## Key Issues

In summary the main points from the Strategy are as follows:

### Targets

The current targets in the study are as follows:

| Growth Targets   | 2008  |    | Low       |    | Medium    |           | High             |  |
|------------------|-------|----|-----------|----|-----------|-----------|------------------|--|
|                  | No.   | %  | No.       | %  | No.       | %         | No.              |  |
| Total Visitors   | 1.6M  | 20 | 1.92M     | 30 | 2.08M     | <b>40</b> | <b>2.24M</b>     |  |
| Holiday Visitors | 0.5M  | 40 | 0.71M     | 50 | 0.77M     | <b>60</b> | <b>0.82M</b>     |  |
| Nights           | 5.1 M | 10 | 5,600,000 | 15 | 5,850,000 | <b>20</b> | <b>6,100,000</b> |  |
| Spend            | £201M | 10 | £231M     | 15 | £245m     | <b>20</b> | <b>£261m</b>     |  |

The Strategy is based on delivering the higher targets. NITB have agreed to show how the above targets relate to Northern Ireland Tourism Strategy – this work is still in progress.

### Strategic Direction

The strategic direction outlined in the document is two fold;

1. In light of the recent investment in the City, current levels of tourists and the economic downturn we will focus on how we deliver what we already have better. As a City we need to work better, smarter, collectively prioritise and pull all resources to deliver. Examples of this include identifying Tourism Place Destinations whereby we can cluster and improve existing product (see section on Tourism Place Destinations). One of the main objectives will be to increase spend opportunities.
2. We must remain visionary. In 1984 only 1% of visitors to Belfast were holiday visitors, in 2008 this is now 38%. Dublin achieves 55%. Our aspiration is to grow holiday visitors and discretionary business visitors from UK, ROI and Europe to similar levels to Dublin. To do this we need to be accessible, offer distinctive, unique cultural experiences and high quality product. During the current period of economic recession, we must continue to invest in the future – the Titanic Signature Project being a good example. This is a 5 year Strategy and we will position ourselves to exploit the economic recovery through marketing and further investment in our tourism infrastructure.

### 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.

### Market

Overall objectives are:

- continue to grow GB Business and Leisure Markets
- Target ROI market – city breaks, turn day drips into overnight stays
- Maximise spend opportunities from NI day trippers and turn into overnight stays
- Develop new market opportunities linked to direct access route to Europe

- Grow Belfast's share of all Ireland tours

### Tourism Destinations

Belfast is considered as a series of tourism clusters or Tourism Place Destinations. These represent areas within the City where there is, or there are planned to be, a concentration of tourist related activity – attractions, services, restaurants, cultural venues, viewing points. Tourism Place Destinations also have a unique role in telling their part of the Belfast Story. The Tourism Place Destinations are:

- Titanic Quarter
- The Lagan River – Maritime Corridor
- City Centre
- Cathedral Quarter
- Queens Quarter (including Botanic)
- Gaeltacht Quarter
- Lisburn Road
- Belfast Zoo, Belfast Castle and Belfast Hills
- Crumlin Road Gaol / North Belfast Cultural Corridor
- Shankill Road
- Connswater Greenway

This approach provides a better understanding of how the various parts of the existing tourism offer are connected and provide a more structured framework for BCC to work across all areas of the City. It will be important to strengthen connectivity via public transport but also public realm.

### Visionary Drivers

These are six main capital projects that will help to lead and drive tourism in the City. It is anticipated that these will inform the next Comprehensive Spending Review and financial support secured via Central Government.

1. Maritime Heritage including the Titanic Signature Project and wider heritage trail
2. Crumlin Road Gaol
3. Belfast Zoo and Hills – Improved accessibility between the Zoo and Hills, new Black Mountain Destination Centre, maximising opportunities presented by Belfast Zoo
4. River Lagan – develop City centre waterfront, develop canal locks and linkages
5. National Art Gallery
6. Conference and Exhibition facilities (new or extended)

### Development Levers

These are essential to developing tourism but are not simply capital development projects. They embrace a range of subjects – provide a feel of the City for visitors and often the spirit.

1. Essence of Belfast– unique culture, heritage and arts must be accessible to the visitor. Also opportunity to develop alternative Belfast themes, music tourism, literary tourism.
2. Story of Belfast – telling Belfast's unique story across key locations but also identifying a prime site to give an overview of the City's history
3. Events – need for an events strategy and balance between repeatable significant events and costly one-offs
4. Sports Facilities – international standards sports facilities essential for City to attract quality events

5. Green and Open spaces – city parks where locals and visitors relax are key features of urban tourism. Need to maximise tourism use of city parks and also North Foreshore.
6. Tourism in the community – tourism is unique in Belfast in having tourism product in its outer areas linked to the City's recent history – need to engage with communities and spread tourism benefits to these areas.
7. Business tourism – Belfast is a successful conference destination – estimated that economic impact of conferences in 2006/7 was £17 million. As a comparison Edinburgh and Glasgow are currently estimating that conferences are worth £150 million and £125 million to their respective cities. Belfast needs more unique venues, better ways of increasing delegate length of stay and spend.

#### Infrastructure and Services

- Visitor facilities and services – more attractions (especially linked to Belfast Story) and more professionalism across the sector. Introduce a Belfast Pass linking all key attractions together. This isn't necessarily high capital spend but improving what we have and making more accessible to visitors e.g. cultural venues.
- Tourist accommodation – based on targets of 20% growth in overnight stays, Belfast will need 850 new rooms by 2013
- Evening and Sunday economy – café culture, Summer Sundays
- Retailing – Royal Exchange, Independent Retail, Shopping Festivals
- Inward access – ensure key European Markets have direct access
- Internal transport and movement – Rapid Transport System, efficient links between all attractions, key route is also Queen's Quarter – City centre and Titanic Quarter.

#### Visitor Servicing

Belfast welcomes £7 million visitors to the City (including NI day trippers) and therefore a high priority is servicing and managing these visitors.

Belfast Welcome Centre (BWC) – requires ground floor location, centrally based. Plays a key role in spreading benefits of tourism across the City, increasing length of stay and spend opportunities. The intention is to link BWC to a series of information points across the city e.g. Queen's, An Culturlann, Spectrum Centre already have these developed – further opportunities will be explored in the Tourism Place Destinations.

Other areas that the study focuses on are:

- Establish an ICT group to maximise new media, on line opportunities
- Centralised ticketing systems/easy to purchase initiatives
- More communications with front line staff – what's on, planning big events/conferences/cruises in the City, ensuring high standards of customer care
- Further develop signage in the City – in particular from Motorways
- Promote use of local produce
- Work across the Council on safety and litter issues
- City planner – calendar of events/conferences/festivals for trade to help decision making and identify opportunities for integration.

#### Quality Standards

Support NITB's national schemes where appropriate.

Ensure industry is sign posted to all training and business support opportunities

Establish good links with other cities/regions to review best practice

Look at opportunities for centres of excellence in tourism related areas  
There is also an opportunity to link the new Belfast Brand to a quality promise from those that use it.

#### Delivery

- Key agencies are BCC, NITB and BVCB. However, a range of other organisations have a role to play in delivery and will be identified against activity in action plan including DSD, DRD, DEL, People 1<sup>st</sup> etc
- Still very much a need for BVCB as a public / private sector model and therefore this will continue as is.
- Tourism co-ordinating group will be established of all key players – senior level to monitor progress of strategy. NITB keen to include private sector ‘champions’ – still not resolved as to who, why and how. To be chaired by Lord Mayor twice a year.
- Need for more co-ordination at operational level between NITB and BCC – will be key role of BCC’s Tourism, Culture and Arts Unit.
- Will also establish internal tourism group within BCC – include parks, amenities, events, community, markets, corporate communications.

#### Conclusion

Key aims of the study are:

- 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 business tourism destination;
- stage a consistent annual programme of events and festivals – including a major high quality one each year and especially those that are unique to Belfast;
- provide 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.

#### **Resource Implications**

There are resource implications for BCC as follows:

Whilst the capital projects should inform the next government Comprehensive Spending Review similar to the Titanic Signature Project, there may be an expectation that BCC will contribute some level of funding to support these projects in due course and this may include the new/extended integrated conference and exhibition facilities; Lagan Corridor and Belfast Hills.

#### **Recommendations**

Members approve the content of the final draft strategy.

**Decision Tracking**

Finalised strategy to be published in April 2010. Any major issues that require a change to the strategy as part of the consultation will be brought back to Committee for discussion in April 2010.

Officer: Kerrie Sweeney

Timescale: April 2010

**Key to Abbreviations**

NITB Northern Ireland Tourist Board

TTC Tourism Transport Consult

BVCB Belfast Visitor and Convention Bureau

DSD Department of Social Development

DEL Department of Education and Learning

**Documents Attached**

Appendix 1 - Final Draft of Belfast Integrated Strategic Tourism Framework