

BELFAST TOURISM: GATEWAY TO THE FUTURE

<p>Titanic Signature Project illustration</p>	<p>Crumlin Road Gaol showing visitors on a tour</p>
<p>The view from Belfast Hills</p>	<p>Waterfront Hall and the Lagan</p>

BELFAST: A LEADING CITY TOURISM DESTINATION AND GATEWAY

In recent years, Belfast has built up a reputation as an international destination for city tourism visits. 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).

To build on the momentum achieved so far, the priority now is to raise Belfast's tourism to a higher level. It has the potential to offer much more to visitors and to attract them in much greater numbers. By doing this, tourism will make an even greater contribution to the local and wider economies and enhance the benefits it generates for businesses, citizens and communities.

Belfast has seen much change in the last 10 years. Its economy has blossomed and its physical appearance has been reshaped in many parts. It is now better placed to perform its role as Northern Ireland's regional driver than has been the case at any time in its post industrial history. With this up-turn in fortunes, Belfast has renewed confidence as a business hub and as a contemporary urban visitor experience.

Earlier in 2009, the City Council referred to this period of change as being the 'rebirth' of Belfast. With reference to a series of public investment projects, including the refurbishment of City Hall, Ulster Museum and Ulster Hall and the prospect of the £97m investment in the Titanic Signature Project, the Lord Mayor declared that the city had experienced "a year like no other..." and that Belfast is a **"vibrant city full of opportunity, inspiring enterprise, creativity and change...."**. This is a confident statement of what the city now represents and shows the enthusiasm with which it is looking to its future.

The city is soon to enter a new era of governance with the introduction, in 2011, of measures under the Review of Public Administration. These will radically alter the function and purpose of the City Council. They will ensure that the Council will perform more effectively in its role as the source of civic leadership. This aspect of city development and competitiveness is universally accepted as being a major influence on the performance of city economies and the shaping of city landscapes. This means also that the Council can help shape the tourism environment in a more direct and meaningful way.

It is important that the city ensures that citizens across all parts will share in the success that development will bring. Tourism, like all major components of public and economic policy, has a role to play in enabling these benefits to reach communities across the city. This is reflected throughout the proposals contained in this strategy.

THE BELFAST BRAND

This is an exciting time for Belfast and Northern Ireland where major research projects throughout 2008 and 2009 have developed a new city and regional brands. Both brands lie at the heart of this strategy. The Belfast Brand communicates that we are a dynamic city with a big personality, proud of our heritage, vibrant, energetic, providing a vivid memorable experience. This study provides the framework for Belfast's tourism sector; public, private and voluntary to deliver the brand experience and position Belfast within the top twenty city destinations in Europe.

The Belfast Brand Proposition is of a city in which *'A unique history and a future full of promise have come together to create a city bursting with energy and optimism'*.

The core values of the brand are:

- *A dynamic city with a big personality between the mountains and the sea*
- *A city proud of its heritage... is alive with possibilities and open to change ... vibrant, energetic and exciting*
- *The people of Belfast provide a welcome which is not just warm, but genuine and generous, inviting anyone and everyone to join in*
- *Belfast provides a vivid and memorable experience with new things to discover every time you visit*

The motivating appeals of the brand are: *heritage & culture, authenticity, welcoming people, distinctive character, relaxed style, discovery, natural countryside, water and urban environments.*

The Northern Ireland brand harmonises with the Belfast proposition. Its core message is: *'Northern Ireland Confidently Moving On'*. It is supported by the twin themes of: *'Experience our Awakening'* and *'Uncover Our Stories'*.

The appeals presented are of a dynamic changing destination with an underlying interesting and compelling history and traditions – shared with engaging people. The core values – like the Belfast brand – are based on: *discovery, character, people and heritage.*

Tourism Ireland's brand used overseas for Belfast and Northern Ireland is also in harmony – *'The island of unique character and characters'*.

Thus, the brand promises and characteristics all revolve around *experiences, people, character, authenticity and discovery.*

This strategic framework ensures that the appeals of the brands motivate all aspects of tourism development, servicing and marketing. Without such a focus then investment may not deliver relevant products or services that meet the promises of the brands and associated marketing. The Belfast brand key motivational appeals of *heritage & culture, authenticity, welcoming people, distinctive character* point to the reality that *culture* in all its many aspects must lie at the heart of the tourism framework if the brand promise is to be delivered.

THE VISION

This is an integrated framework between Belfast City Council and the Northern Ireland Tourist Board. Our vision for this document is to work together in delivering our brand promise to our visitors;

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.

In elaborating upon this vision, Belfast will:

- 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;
- possess 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.

*It is emphasised that the Vision for tourism in the city is underpinned by Belfast City Council and NITB's commitment to **sustainability**. This means sustainability in terms of the environment, of the economy and of the people. Sustainable tourism is defined as a process which meets the needs of the present tourists and host communities whilst protecting and enhancing needs in the future. This principle lies at the heart of this Framework.*

THE CURRENT VISITOR EXPERIENCE

While a high proportion of incoming staying visitors to Belfast are on business trips (38%) or on a visit to friends and relatives (15%), those coming for leisure purposes (holidays or short breaks) have shown the greatest growth in recent years (now 38% compared with 1% in 1984). However, there is some way to go to reach the 55% achieved by Dublin (Dublin received over 5.6 million tourists in 2008). Visitors are attracted by Belfast's culture and heritage and its current novelty appeal as a city on the way up. The successes and shortcomings of the current visitor experience, as identified by visitor surveys, consultations, workshops and comparisons with other cities can be summarised as follows:

Strengths	Weaknesses
Existing attractions (incl. City Hall, Belfast Zoo, Crown Bar, Queen's, Botanic Gardens, St George's Market, St Anne's Cathedral, Stormont, W5) City Centre shopping and independent retail product in neighbourhood areas Odyssey Complex Tours – by bus, black taxi and walking Range of hotel provision The Belfast Welcome Centre Interaction with locals – their friendliness Nightlife and traditional entertainment Festivals and events (including concerts and performances e.g. Ulster Orchestra at the Ulster Hall) Wide range of culture and art Architecture Parks and Green Spaces Accessibility by sea, air and rail www.gotobelfast.com Still relatively new up and coming city to visit – Lonely Planet listing	Needs more things to do and see – to build on Belfast's own distinctiveness Public places and streetscapes are not consistent in quality Lack of café culture Lack of cleanliness of public streets and spaces City presentation – needs further investment – banners, public art etc Restricted range of eating out options + price and value Shortage of B&Bs, guest houses, boutique hotels and aparthotels Poor transport links between attractions and tourist facilities Limited street entertainment and animation No integrated conference and exhibition facilities Only accommodation rated for quality standards Customer service could be improved Lack of co-ordinated approach between tourism and arts sectors July and Sundays remain closed to visitors Marketing and promotion – too many messages – needs more co-ordination
Opportunities	Threats
Belfast Brand Titanic Quarter Regeneration Connswater Community Greenway Belfast Story - waiting to be told, including our history, music, culture and industrial heritage Range of development opportunities e.g. Crumlin Road Goal, Floral Hall, Carlisle Methodist Church Gaeltacht Quarter Greater Accessibility to cultural events and programmes New developments in music and literary tourism Maritime Heritage and Titanic Signature Attraction Packaging products (e.g. events, restaurant/entertainment deal) Number of free experiences Family and Friends New technology to access information and purchase goods	Air and sea routes reducing Business Travel is falling Security and safety perceptions Expensive compared to other destinations e.g. hotel rates Racial and sectarian violence New buildings and development not developed to architectural excellence

There has been great momentum in undertaking significant projects that will benefit tourism. Some recently completed or in the pipeline which boost the appeal to tourists include the Ulster Hall reopening (March 2009); the Tall Ships (2009); City Hall refurbishment (2009); Ulster Museum reopening (2009); St Anne's Square and the MAC (2011); the Lyric Theatre (2010); Belfast Rapid Transit System (starting 2011); The Titanic Signature Project and associated developments (2012); The Gaeltacht Quarter and

current improvements to street environments. There is a good hotel base for the city which is still expanding and good orientation for the visitor. It is a compact city and the current 'streets ahead' project is improving the fabric of the city centre.

Investment planned or under way in the city centre by both the public and private sectors amounts to some £1billion of projects. Outside the inner city area a further £0.7billion is also at planning or implementation stage.

All of these will undoubtedly boost the city's tourism appeal but more is needed. The Belfast Brand, 2008 concluded "*A unique history and a future full of promise have come together to create a city bursting with energy and optimism*". The time to build upon that brand proposition is now.

CHALLENGES & OPPORTUNITIES

If Belfast is to compete effectively with other European cities, the challenge is to adopt an innovative approach which provides a unique and satisfying visitor experience, appealing to selected source markets throughout the year. Hence, Belfast will differentiate itself from being simply another place to visit and become a compelling city destination and gateway.

The main challenges or risks perceivable at this time to the future growth scenarios for Belfast tourism are:

- Economic Uncertainty & Downturn – the length and depth of the downturn are not known at this time. The main markets for Belfast – GB and ROI - are suffering. The long term health of those economies and the effect on spending on travel is an unknown quantity. Initial findings from 2009 show the domestic and ROI short break markets are buoyant.
- Investment – Private Sector – the economic crisis has severely affected most banks and lending is now constrained. The length of this constraint is not known, but it is certain that lending conditions will be tighter than ever before and private investment must inevitably suffer;
- Investment – Public Sector – the downturn has impacted here too and a new range of major public investments in tourism projects will be hard to achieve;
- Increased competition – as ever, this remains a threat to future growth if Belfast falls behind its competitors. Most, however, are likely to be operating under similar constraints to Belfast, at least for some years;
- Restricted access – this is a threat that is emerging as direct air route access to Belfast from major European destinations is reduced. This impacts on Belfast's Gateway role;
- Exchange Rates – Belfast's retail sector has benefitted in recent years from increased numbers of shopping visitors from across the border due to Sterling's decline against the Euro. However, the downside is that the number of GB visitors to Ireland has fallen and this will impact negatively on the holiday visitors to Northern Ireland who may have entered through ROI.
- Image – Belfast's new image as a major tourism city recommended in every guide must be maintained and confirmed. Incidents of unrest or violence that undermine this hard-won image could do enormous damage to the attractiveness of the city as a major tourism destination.

MOTIVATION, MARKETS AND TARGETS

Motivation

The motivations to visit cities are many and complex, reflecting the diverse interests and segmentation of the market for travel. While 'culture and sightseeing' is frequently cited as the main motivation for urban visits, and might well be the primary appeal for many, not all visitors would regard themselves as cultural tourists. The motivation to visit city destinations can range from general sightseeing to attending an event to going shopping, depending on the consumer's needs at a particular time. Research would suggest that successful cities not only project a range of both heritage and living cultural attractions, including some of iconic status, but also meet the tourist's expectations on a set of essential facilities and attractions integral to a city visit. In summary:

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| <ul style="list-style-type: none">➤ For some visitors, culture is the prime reason for travel, while for others the appeal is more to do with the ambiance, 'decor', 'atmosphere' and authenticity of the city - especially the cultural heritage. The intangible elements of culture, including lifestyle and creative industries, are becoming increasingly important in distinguishing between cities and providing reasons to visit. In both cases, culture plays an important, but very different role.➤ A large number of city trippers do not see themselves as (city) cultural tourists. Research would suggest that only about one in four city tourists rate culture as their prime motivator, but much more are actually involved in cultural activities while on a city trip.➤ For some cities, the concept of the creative city, linking the traditional cultural attractions, services and heritage with the creative industries such as media and entertainment, design, architecture and fashion, is of particular appeal in attracting visitors. Creative tourism – visitors participate in experiences with local communities.➤ Cultural (mega) events and festivals offer interesting opportunities for city destinations in attracting both first time and repeat visitors.➤ With the increasing globalization and mass production leading to greater uniformity worldwide, the value of authenticity and distinctiveness is increasingly appealing to potential visitors. Uniqueness is a key objective for any city that wants to promote itself as a tourist destination, especially in the face of growing competition. | <ul style="list-style-type: none">➤ Popular city tourism destinations often have iconic features or landmarks that visitors associate with them. Towers and viewpoints (including wheels and higher ground) are also a common feature of the attractions on offer to city tourists.➤ The most popular activities undertaken by city visitors during their trips are sightseeing (including tours) and visiting places / objects of interest, followed by sauntering about and enjoying the atmosphere, eating and drinking and shopping.➤ The most important traditional cultural activity for city tourists is visiting museums and galleries. Although there are some differences which seem to relate to differing interpretation of cultural activities. Research has shown that there is a disparity between those who say that they are motivated by culture and museum visits and those that actually do visit them. Considerably fewer visitors take part in a cultural visit during their trip than those who say they will do so.➤ It is also clear that visits to events, such as arts performances and festivals are important in the activity mix for various niches within the overall travel market.➤ Attendance at theatres during city trips tends to be much lower, because of the problems associated with obtaining tickets and language barriers. |
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Belfast enjoys a vibrant mainstream and alternative arts scene, comprising contemporary, traditional and popular cultural production. Belfast is a city of poets, writers, painters, visual artists and dramatists. A city of enlightenment. The idea of discovery is appealing to the visitor. The challenge for Belfast is to make visible what already exists under the surface of the city's life. There is a need to harness the sum of the parts of the city; which means:

- Maximise the effectiveness and accessibility of existing infrastructure
- Maximise enjoyment and appreciation of home grown arts and cultural product
- Support and Increase levels and quality of programming output

Markets

City tourism in Western Europe is forecast to continue to expand at a rate faster than the overall travel market, at least in the short to mid-term. The best prospects for Belfast tourism will continue to be the people who holiday in the island of Ireland as 'sightseers and culture seekers', those who come for business reasons, those taking short breaks and those on day visits. The main sources and prospects are

Source Markets	Prospects
Great Britain	For the foreseeable future, it will continue to be the largest source of staying visits to Belfast (for leisure, business, and conferences).
Republic of Ireland	During 2008, there were considerable increases in day visits (145%) and staying visits (155%) from this source (influenced by the weakness of sterling against the euro). However, there is considerable scope for it to reach its full potential as a source of staying visits to Belfast. The best prospects are people in pre and post family life stages.
Northern Ireland	This domestic market will continue to be important, more particularly for day trips, as the number of stay-over visits has diminished recently. The main purposes will continue to be shopping, personal and professional visits, attendance at events, entertainment, etc.
Europe	Selective markets in mainland Europe with direct air access to Belfast offer a new opportunity to attract increasing numbers of city break and gateway tourists to the city while an opportunity exists in attracting more visitors on a trip to Ireland to include a stay in Belfast. Investment in further development of the European source markets should be undertaken in line with the establishment of viable and sustained air services on selected routes.
Other Overseas	Belfast also has the potential to attract more visitors from North America and other long-haul markets. While an opportunity exists in attracting more visitors to include a stay in Belfast as part of an island of Ireland and/or Northern Ireland touring trip, expansion of direct air services would considerably boost the potential.

Targets

Sustained growth in Belfast tourism will depend on a sharper focus on those market segments which offer the best potential. Such a targeted approach will secure the best return on marketing investment. The growth targets proposed for Belfast tourism, for staying visitors over the next 5 years, are:

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

The levels of growth achieved will depend upon the recovery rate of the world economy and the potential changes to the competitive position of Belfast and Northern Ireland. The targets are based on a detailed analysis. The spend targets include an increased spend per visit which is an important target for Northern Ireland tourism overall. This plan and subsequent actions are based on achieving the high end targets.

THE TOURISM SPATIAL DIMENSION

A city's spatial configuration and qualities are key factors in how it is experienced and enjoyed by visitors. City tourism experiences are more than a collection of attractions, events, entertainment and shopping. They are a product of the totality of the urban experience. This includes the quality and character of the physical landscape, the vibrancy of the cultural environment and the presentation of the City as an accessible and connected place. In this way, the City is more than the sum of its parts for both the visitor and citizen.

By looking at tourism in the City from a spatial perspective, its structure in terms of 'place' can be understood and built upon. The shaping of the physical environment, both built and natural, contributes to the celebration of the City's heritage. It also represents the City's sense of expression, values and confidence and says something about contemporary life-style and aspirations for the future.

In Belfast, the visitor experience can be enhanced and is directly affected by a number of key spatial principles:

- The quality, variety and vitality of public spaces such as streets and squares and the degree of shared 'public life' that is created;
- Access to and use of natural assets such as the River Lagan and the Belfast Hills;
- Access to and presentation of the city's built heritage in the form of buildings of architectural and historical significance and areas of visually and historically important townscape value – Belfast City Centre is a conservation area and this must be developed sensitively;
- The degree to which the city's local distinctiveness is conserved and nurtured, including visual landmarks and viewing points;
- The ease with which visitors are able to move around the city, either walking, cycling or by public transport;
- The emphasis and importance placed upon the quality and distinctiveness of new urban interventions both in terms of buildings and public spaces;
- The degree to which different parts of the city are successfully connected by safe, attractive and visually interesting public spaces and access corridors e.g. the River Lagan; and
- The degree to which environmental sustainability is nurtured by projects such as the North Foreshore, Connswater Greenway and the creation of 'green' connections between neighbourhoods across the City

Visitor surveys and other sources suggest that one of the principal shortcomings in Belfast's visitor experience is the level of quality and appeal of public spaces and streetscapes. This is combined with issues around street cleanliness, public transport provision and street animation and entertainment. It paints the picture of a city which lacks the kind of environment expected in great European cities. Improvements have been brought about in recent years by the 'Streets Ahead' programme, the urban riverside public realm improvements at Lanyon Place and along the Lagan. Unprecedented levels of investment have taken place in new developments such as Victoria Square and St Anne's Square and the emergence of locations such as the Queens and Cathedral Quarters as unique and attractive 'character areas'. Nevertheless, it is apparent that there is still much that Belfast has to do in order to build on recent investment to improve its physical environment and put it, at least, on a par with other great cities across Europe.

Tourism Areas ('Place Destinations')

In order to gain a better appreciation of the city tourism offer, Belfast is considered as a series of tourism clusters which are described here as Tourism Place Destinations. These represent areas within the city where there is, or there is planned to be, a concentration of tourist related activity e.g. attractions, services, restaurants, cultural venues, viewing points.

These areas include established parts of the city offer as well as those that are still emerging as tourist areas.

<p>The Lagan River-Maritime Corridor – the waterfront has already seen significant change over the last decade. Future developments include the City Quay's Project, Carville's Development, linkages between Titanic Quarter and the City Centre via new bridges, development of the river itself and its towpath for leisure and recreation – linking Belfast to Lisburn and beyond. The waterfront requires animation, events, and interpretation.</p> <p>City Centre – an attractive heritage/ conservation area with good quality retail. Investment in infrastructure such as Victoria Square has greatly added to the product offering as well as new hotel development including 5 Star Fitzwilliam Hotel. The Waterfront, Ulster Hall and Grand Opera House remain excellent event venues. Investment into the evening economy and Sundays product is paying dividends, although Belfast cannot be complacent - there is now a need to look at the night time economy, café culture, food tourism, city centre based events, street animation. Plans for the Rapid Transport will help provide greater linkages to and from the City Centre. City Hall provides an excellent visitor attraction – probably a key weakness is that there are no other visitor attractions in the core area.</p> <p>Queens Quarter – Featuring Queen's University, Botanic Gardens (1829). The Palm House (1839), The Tropical Ravine (1889), new Lyric Theatre to open in 2011, Ulster Museum, Crescent Arts Centre re opened, Queen's Film Theatre. Annual Belfast Festival at Queen's – due to celebrate its 50th Anniversary in 2012. Range of things to do including bars, clubs and restaurants. Lively student scene. Need to look at how all attractors can work together.</p> <p>Lisburn Road There are more than 200 independent businesses on the Road and a wide and varied choice of restaurants, coffee shops and wine bars. The road has over 50 clothing independent</p>	<p>Belfast Hills, Belfast Castle and Zoological Garden- Belfast Hills are a huge asset for the city and strategic over-view is required through a partnership of key stakeholders led by Belfast Hills Partnership, National Trust and Belfast City Council. In the short term some interpretation around archaeological excavations may provide some local and wider interest in the area – some success already undertaken by Linen Hall Library in 2009. The Castle is a great asset in a number of ways. The grounds are beautiful and provide easy access to walks leading further up the hills. The situation provides one of the best view points across the City. The building is attractive and the story, covering the transfer from the Donegalls to the Shaftesburys is an important part of the broader Belfast story. The fact that it was build as a deer park is a great hook and there are great paintings and photographs to help with the stories. The Castle is a successful venue and could be greater maximised to support Belfast's Business Tourism infrastructure. The zoo is one of the most successful tourism attractions in Belfast. There is an opportunity to combine the zoo experience with the location and terrain. A study is currently being prepared to assess the future of the Floral Hall which could be a significant tourism attribute for Belfast.</p> <p>North Belfast Cultural Corridor is home to some of the City's most historic and interesting buildings. This destination focuses on the development of the Crumlin Road Gaol and Court House as tourism drivers for the area but also includes the opportunity of developing high quality public realm and environmental improvements along a corridor from Cathedral Quarter to Crumlin Road Gaol, linked by a series of stepping stones that provide access to a rich and diverse cultural experience at key sites including Clifton Orange Hall, Indian Community Centre and Carlisle Memorial Methodist Church through interpretative exhibitions. Community inspired public art will feature heavily along the route creating iconic focal points at areas previously linked to conflict e.g. Westlink bridge. The overall project will</p>
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stores offering more than 600 individual labels dedicated to fashion for ladies, gents and children. The road has an active Business Association that have been lobbying for additional support from stakeholders to help the development and marketing of the road. The Independent sector has been under pressure from increasing rent and rates, falling footfall and a fall in consumer spending. This has resulted in businesses closing down and the increase of vacant units. The increase of vacant units have fuelled low footfall and spend as well as impacting on the look and atmosphere of the road.

Gaeltacht Quarter - The Gaeltacht Quarter is centred around the junction of the Falls Road and Broadway. It offers much to those who have an interest in the local community, people and places that have shaped local history. In terms of product it has two famous cemeteries, City Cemetery and Milltown Cemetery, a number of political sites and murals, attractions/ centres such as An Cultúrlann and Conway Mill as well as the Divis Mountain and Belfast Hills. It also has a unique protected bogland 'The Bog Meadows Nature Reserve'. There are scores of pubs and clubs offering music and entertainment and Féile an Phobail, Europe's biggest community festival, with its Spring and August Festivals. Indigenous Gaelic sports feature heavily in the life of the Quarter.

The Shankill Road - The Shankill's history goes back two millennia, when an ancient track, rising out of marshland (*now downtown Belfast*) connected counties Down and Antrim. On this track, likely trodden by St. Patrick, the first Christian settlement in this part of County Antrim was founded in 455 AD. (*Shankill, or Sean Cill in Irish, means Old Church*). The ancient Shankill Graveyard in which the original church stood can still be visited today. The Shankill was also at the heart of Belfast's linen industry – "Irish Linen" and two of the original mills, though no longer operational, stand nearby on the Crumlin Road and at Conway Street. Memory of the recent conflict is never far away as witnessed by the memorials to those who died in the area; the dozens of paramilitary, political, cultural and community murals and the ever-present "peace walls" which still snake through the area, the longest of which in Cupar Way, is being transformed into an outdoor gallery of world class art works. Newly opened Tourist Information Point at Spectrum Centre in 2009.

be underpinned by an annual programme of high profile multi-cultural and shared events.

Cathedral Quarter - this area is already a prominent tourism destination for Belfast and the Cathedral Quarter Steering Group are in the process of completing a strategy for the future development and management of the area. It is the cultural focal point for Belfast housing the Belfast Circus School, The Black Box, numerous galleries, restaurants and cafes. Home to the Cathedral Quarter Festivals, Festival of Fools, Culture Night as well as St Anne's Cathedral and the 5 star luxury Merchant Hotel. The area is currently undergoing significant investment with St Anne's Square development incorporating the new Ramada Encore Hotel as well as the new MAC (Metropolitan Art Centre) as well as ongoing investment from the University of Ulster.

Titanic Quarter- We need to plan approaches across time to manage the period between now and 2012. The current situation certainly does not translate into a Place Destination, in terms of physical environment, access and visibility of the heritage story, clearly linked to the 'building site' situation. The issues of what the Titanic brand/product actually represents need to be resolved. Signage needs to be adaptable to the current fluid public realm. HMS Caroline and Nomadic are major opportunities however costly. The H & W HQ is an authentic asset which needs to be maintained to ensure the Titanic Place Destination realising its true potential. More could be made of the Harland and Wolf Cranes which are an iconic landmark for the city (similar cranes on the Clyde in Glasgow become viewing towers for the city. From a number of directions, the relationship with East Belfast needs to be addressed, as well as with the wider City.

The Connswater Greenway – opportunity to unveil key aspects of the Belfast Story e.g. Conn O'Neill and the mystery of his vanished castle. The Castlereagh Hills are another potential gateway and view point, a connection to the south and east, part of the important Lagan corridor. Need to explore links to CS Lewis. At the other end, the Lower Newtownards Road and surrounding areas have potential, but are currently problematic and could impact on Titanic Quarter.

Consideration of Belfast's main existing and potential tourism areas in this way helps to identify gaps in service and product provision and highlight issues in relation to connectivity. Insight is also gained into how the whole city offer might be presented to the visitor by way of a series of inter-connected destinations.

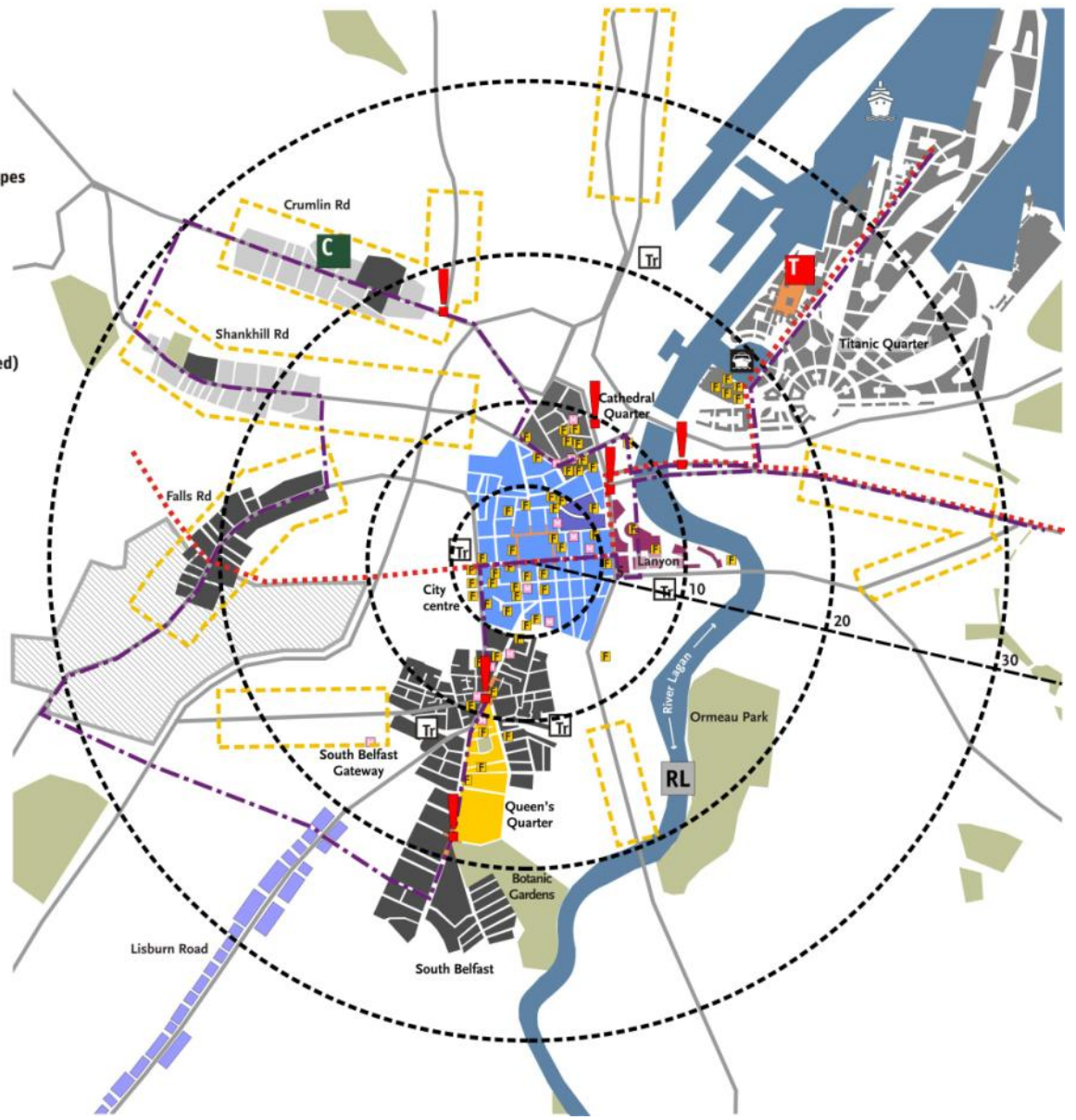
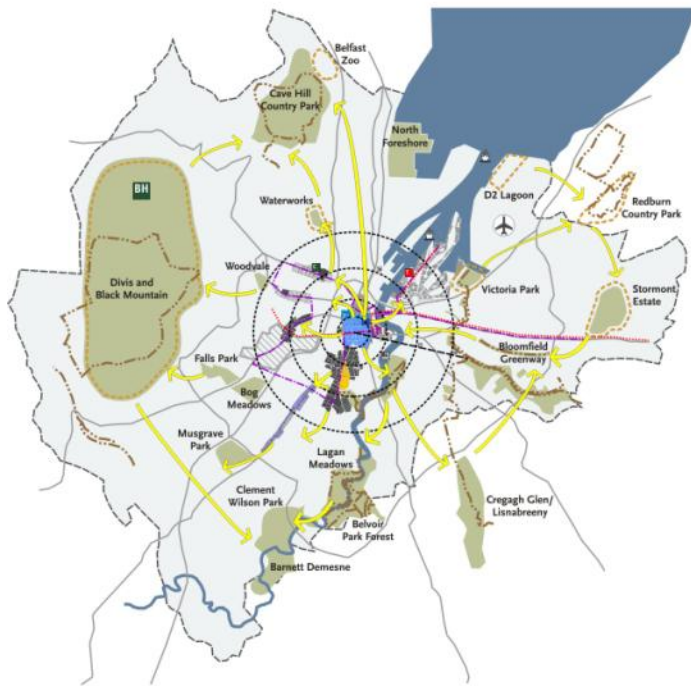
To do this, a series of actions will be required throughout the term of this framework document;

1. *Identify key partners and stakeholders*
2. *Audit each Tourism Place Destination with an agreed template*
3. *Agree distinctive role in overall Belfast offer including role in telling the Belfast Story and community tourism*
4. *Identify key actions with partners/stakeholders for implementation*
5. *Map connectivity / linkages between each destination e.g. public transport, bridges (e.g. bridge linking Titanic Quarter to City Centre / Cathedral Quarter), visitor experiences/ guided tours, common product development opportunities e.g. events, music tourism as well as public realm opportunities e.g. link between Crumlin Road Gaol and the Cathedral Quarter via North Belfast Cultural Corridor – high profile public realm development of Crumlin Road and Carlisle Circus.*

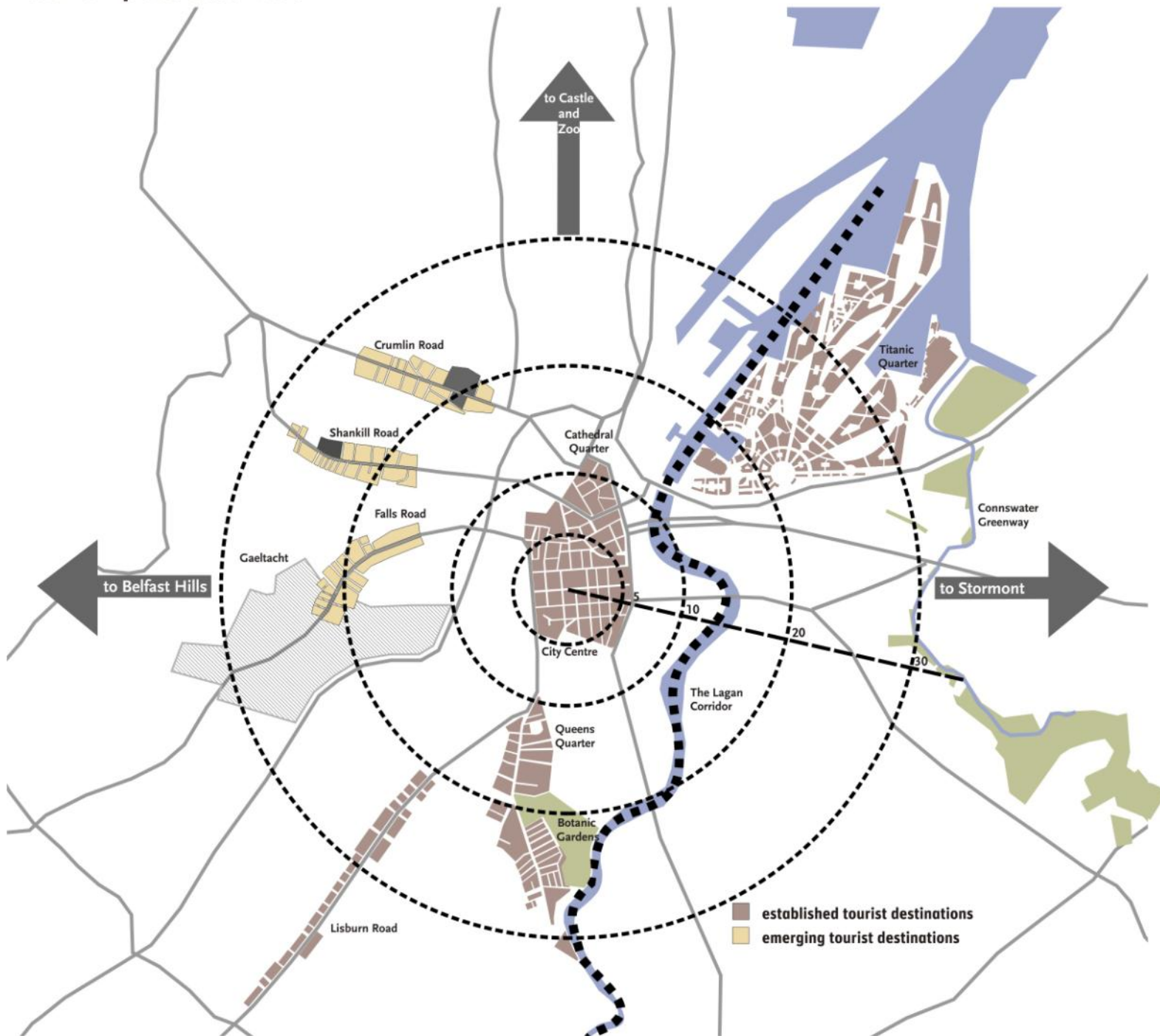
belfast integrated strategic tourism framework

tourism spatial framework

- city centre
- walking distance
- F food venues
- M music venues
- T Titanic Signature Project
- C Crumlin Road Gaol
- BH Belfast Hills
- RL The River Lagan
- NG National Art Gallery (not located)
- CC Conference and Exhibition Centre (not located)
- places/focal points
- Tr railway stations
- marina
- airport
- ferry
- arterial routes
- route improvements
- parks and designed landscapes
- urban breakdowns
- wildlife sites
- Gaeltacht Quarter
- footpath links
- dynamic connections
- existing City Tour Routes
- Guided Bus Routes (proposed)



belfast integrated strategic tourism framework
tourism place destination



belfast integrated strategic tourism framework

route through core tourist areas



belfast integrated strategic tourism framework
uniting the tourism areas

- tourism areas
- gap zones in urban fabric
- new urban structure
- public realm
- pedestrian priority
- green networks



transport stop - placemaking in the urban fabric



trees and public realm define transport route

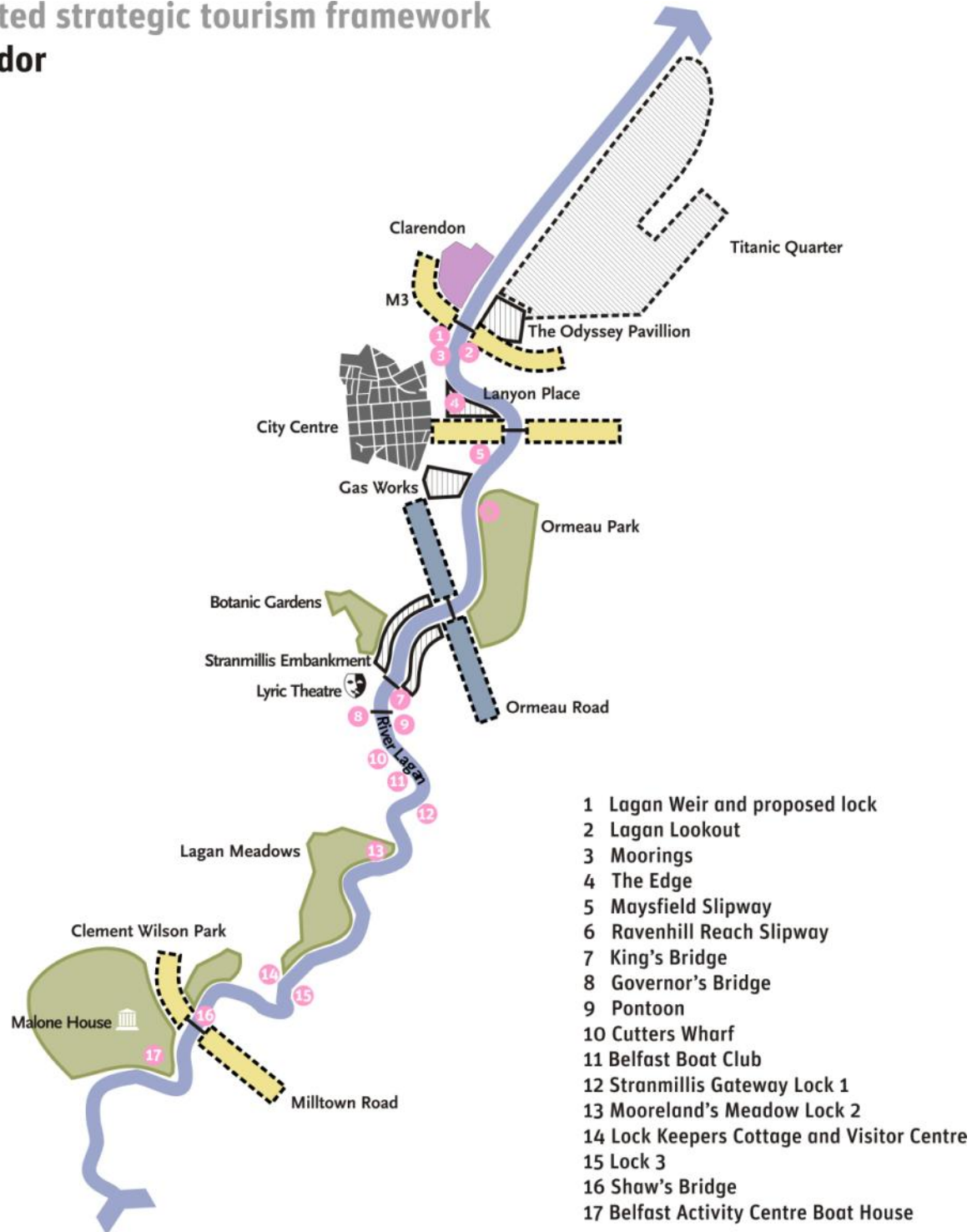


public transport routes structure the city centre



state of the art transport information systems

belfast integrated strategic tourism framework the lagan corridor



In order to make more of and enhance the city's spatial qualities the following approach is recommended:

<p>1. Establish Titanic Quarter as a world class waterfront visitor destination which aspires to the highest standards of urban design, sustainable transport, architecture and 'place-making' and which has excellent and well executed connections to the City Centre. Maximising authentic heritage such as the Harland and Wolf Drawing offices as well as iconic landmarks such as Samson and Goliath Cranes.</p>	<p>2. Work to establish the River Lagan as a principal 'thoroughfare' through the city, linking the Lagan Valley, the City Centre and the Harbour/Titanic Quarter.</p>
<p>3. Develop the network of Tourism Areas (Place Destinations) across Belfast through informing future investment decisions, nurturing the uniqueness and offer in each area and presenting to the visitor the wide variety of 'places' to visit in the City.</p>	<p>4. Ensure Belfast City Centre is one the principal centres in the UK and Ireland with a range of quality facilities and services, and a safe, vibrant and animated public realm.</p>
<p>5. Enhance the city's public spaces, improving connectivity between attractions, facilities and city destinations (including the city's outer neighbourhoods) by investment in key locations. See Page 15.</p>	<p>6. Promote investment in a sustainable city-wide public transport system building upon the proposed Guided Bus Network and existing services, connecting attractions and facilities across the City which are becoming all the more widespread and potentially disparate.</p>
<p>7. Drive up urban quality across the City to achieve ever higher standards of design, and establish a 'Design Panel' to assess major strategic projects (e.g. the type of remit exercised by the Commission for Architecture and the Built Environment - CABE - in England) and a City Conservation Forum to promote the best care of Belfast's built and natural heritage assets.</p>	<p>8. Develop a City-wide 'Greenways' Strategy based on improving connections between City neighbourhoods and to and from the City Centre.</p>

PRODUCT DEVELOPMENT

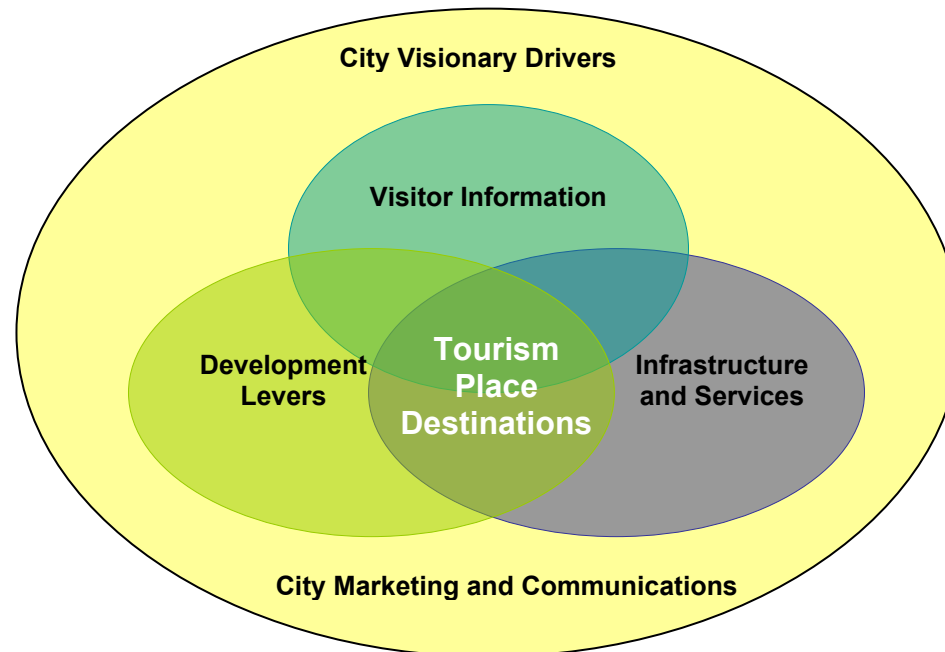
Following consideration of the market opportunities, the outcomes of the consultation process, the spatial dimension and comparisons with other cities, key product development actions for achieving the vision have been divided into three categories:

Visionary Drivers - These are the six main projects that will help to lead and drive tourism towards achieving the vision. They will greatly enhance the city's distinctiveness and uniqueness and inspire potential visitors to take the trip and enjoy the experience. In many instances these are regional drivers with an impact well beyond Belfast.

Development Levers - These are essential to developing tourism but are not simply capital development projects. They embrace a far wider range of subjects – they can provide the 'feel' of the city to the visitor and often the spirit.

Infrastructure, Services and Environment - These are the necessary components needed to make the city work effectively as a tourism destination and as a place to live and work. They will ensure that the basic services and facilities are provided to a standard and quality that fully complements the vision.

The following diagram demonstrates how Product Development relates to the **Tourism Place Destinations**. It is recognised that **not** all Tourism Place Destinations across the city will physically have a visionary driver, they will all have the opportunity to connect to the visionary drivers as they will benefit the entire city. Likewise, whilst they will require information and promotion at a local level, the destinations will be integrated into the wider city marketing and communications plan to promote Belfast as a City Destination. Tourism Place Destinations **must** offer a range of development levers and high quality infrastructure and services.



VISIONARY DRIVERS

One of the six is well advanced but the others need much work to be done to take them forward:

Visionary Drivers: Description	Contribution and Impact
<p>Titanic Signature Project & Maritime Heritage This major new visitor attraction which will be the focus of associated developments in Titanic Quarter is regarded as the lynchpin of Belfast's tourism growth. It will have state-of-the-art displays on the story of the Titanic and Belfast's industrial, shipbuilding and maritime history. The Signature Project will be a catalyst to the whole theme of the maritime heritage of the city embracing icons such as SS Nomadic, Thompson Dock and H&W Drawing Offices.</p> <p>Outputs Required:</p> <ul style="list-style-type: none"> ➤ <i>Deliver new visitor attraction by 2012</i> ➤ <i>Ensure Titanic Quarter is developed as a Tourism Place Destination offering a quality visitor experience incorporating H&W cranes, drawing offices, Thompson Dock, Abercorn Basin, SS Nomadic, Lagan Legacy.</i> ➤ <i>Prepare a wider maritime heritage strategy</i> ➤ <i>Explore opportunity of retaining HMS Caroline in Belfast.</i> 	<p>This iconic attraction will create new levels of uniqueness and appeal for Belfast and Northern Ireland. It will also encourage other investment and support other businesses and maritime attractions in the area. It is a £97m project which aims to attract some 400,000 visitors per annum, of which around 150,000 will be from outside Northern Ireland. It will support 600 jobs during its construction and 165 permanently in the centre and its associated facilities. It will generate £30m annually for the economy.</p>
<p>Crumlin Road Gaol Guided tours of the Gaol, available on a seasonal basis since 2007, have demonstrated its potential for further development as a significant new visitor attraction. However, it needs a sensitive and innovative approach to ensure iconic status. Parts of it also have the potential to tell 'The Belfast Story', perhaps concentrating on the social side in a way that complements other visitor attractions.</p> <p>Outputs Required:</p> <ul style="list-style-type: none"> ➤ <i>A multi dimensional visitor experience incorporating the Gaol and Courthouse focusing on the Belfast Story</i> 	<p>This also has the potential to become a unique experience and source of discovery for visitors to Belfast. It will act as a magnet to attract people out of the city centre and to help spread tourism into less traditional areas. It is physically linked to the old Courthouse which offers a significant tourism opportunity if the building can be restored. Together they could help transform that part of the Crumlin Road into a new tourism hub and a gateway to outer parts of the city.</p> <p>It will contribute to the Vision by adding to the range of things to see in the city. It has unique stories to tell and already has proven appeal.</p>
<p>Belfast Hills and Belfast Zoo Improved accessibility and the opening of the National Trust Centre on Divis Mountain mean that spectacular views of the city are now open to all. The priority now is to promote these as an attraction linked to the facilities and experience of Belfast Zoo – one of Northern Ireland's top visitor attractions. To achieve the area's full potential as a visitor attraction, however, innovative access options should be investigated.</p>	<p>Towers and viewpoints are frequent features of city tourism. Promoting and providing innovative access to the Belfast Hills will add to the unique range of experiences on offer. It will also help to spread the benefits of tourism by encouraging more visits to other parts of the city and increase length of stay.</p>

<p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Promote the Hills as a Belfast's viewpoint attraction.</i> ➤ <i>Examine feasibility of innovative access options.</i> ➤ <i>Maximise tourism opportunity of Belfast Zoo</i> 	
<p>The River Lagan</p> <p>The river is the spine of Belfast and has a major role as a means of connecting key riverside sites. This includes providing linkages between Titanic Quarter and other key developments which might include a re-opened Belfast Marina, a Conference & Exhibition Centre and international hotel developments.</p> <p>There also needs to be greater activity on the Lagan and its riverbanks. This will be assisted by more tour boat activity but also by developing, through time, the link between Belfast Lough, Titanic Quarter and the Lagan Canal. This will require two major investment projects, at least, involving new locks at Lagan Weir and at, and beyond, the Stranmillis Gateway.</p> <p>The visionary investment in Titanic Quarter should initiate a chain reaction of development along the river. The provision of good river and riverbank connections is a priority. Cycling and walking along the river will have a widespread appeal. Links to Titanic Quarter, Queens Quarter and the City Centre will help develop a destination approach.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Analyse existing and proposed land uses and spaces and produce a comprehensive plan that shows how the Waterfront can be developed, linked and promoted as a key area for visitors</i> ➤ <i>Pursue initiatives to increase activity on the river (e.g. more access points and moorings);</i> ➤ <i>Develop the Lagan Canal locks and linkages;</i> ➤ <i>Provide a marina on the sea side of the weir.</i> 	<p>The river's role as a medium for connecting places of activity and interest is of great importance. It can attract new levels of use which, in turn, will encourage further development. The river is also the link that ties in with Titanic Quarter and the development of maritime heritage.</p> <p>It can link in turn into the old Lagan Canal through restored locks and in help open up the Lagan Valley to increased tourism use.</p> <p>The attraction of Belfast to visiting craft will be enhanced by the provision of marina facilities.</p> <p>Significant capital investments will open up this largely unused resource in the centre of the city and create a reinvigorated feature of interest and activity for locals and visitors.</p>
<p>National Art Gallery</p> <p>The lack of a National Art Gallery for Northern Ireland is a major gap in a capital city and gateway. Subject to the outcome of ongoing feasibility studies, it is regarded as a long-term visionary project.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Completion of Feasibility Studies;</i> ➤ <i>Emphasise the case for a city centre location.</i> 	<p>This may be a longer term project but it would provide an exciting tourism asset for the city. By its very nature, it will add to the uniqueness of Belfast. It is regarded as a key component for fully achieving the Vision.</p> <p>Comparison with other cities confirms that major art galleries are primary tourism assets. Capitals cities present collections unique to their nation.</p>
<p>Conference and Exhibition Centre</p> <p>There is a need for new or extended integrated conference and exhibition facilities in the city, in response to growing competition and certain current deficiencies (e.g. lack of dedicated exhibition space).</p>	<p>Belfast's conference business is currently worth £6m - £7m per year to the local economy. Since its opening in 1997, the Waterfront Hall has generated £10 for every £1 spent on its operating costs. New investment will help to</p>

Significant work has already been undertaken to identify possible solutions to this product gap. With Dublin's new conference centre opening in 2010, there is now an urgent need to review options and potential delivery with a view to plugging Belfast's infrastructure weaknesses within the next 3-5 years if not before.

Actions Required:

- *Examine opportunities for private sector solutions to space requirements;*
- *Alternatively, carry out long-term development and feasibility study;*
- *Back up with a Business Tourism Strategy at national and Belfast levels (if required).*

improve competitive advantage and secure the benefits of conference business to Belfast tourism.

This project will contribute to the Vision by consolidating Belfast's position as a business tourism destination.

DEVELOPMENT LEVERS

Development Levers: Description	Contribution and Impact
<p>The Essence of Belfast; The Belfast Story This is a thread which should run through all that is done to develop tourism – to reflect the brand values of the city. It should embrace: Heritage – the story of the city through the ages The Cultural Offer – the unique culture and arts of the city made accessible to visitors Tradition & Community – the legacy of the city’s recent history needs to be accessible to visitors</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Maintain a high standard and a variety of product that will encourage repeat visits</i> ➤ <i>Identify innovative ways to communicate the Belfast Story across the City</i> ➤ <i>Continue to develop literary, music and all arts as tourism offerings</i> ➤ <i>Support for the concept of developing a Festival Feel around key traditional events;</i> ➤ <i>Ensure a welcome to all and marketable ‘products’.</i> 	<p>To reflect the heritage, culture, urban design, tradition and community and peace and reconciliation in the city. The tourism product should reflect this spirit of the city and ensure that it has a uniquely Belfast character. Losing this essence will mean that Belfast may simply be seen as ‘another’ regional city.</p>
<p>New Product Development Belfast City Council has made considerable investments in developing a range of ‘new product’ for visitors including: Hard Hat Tours, 72 Hours, CS Lewis Tours and Late Night Art. It is vital that this work continues to ensure that Belfast has a competitive edge and visitors can easily access new and exciting experiences across the city.</p> <p>These initiatives also allow interaction with local suppliers many of whom do not necessarily see themselves as tourism providers –who are supported through programming, networking clustering and packaging initiatives.</p> <p>New and emerging products that are a high – medium priority include:</p> <ul style="list-style-type: none"> ➤ <i>Music Tourism;</i> ➤ <i>Literary Tourism;</i> ➤ <i>Family Tourism;</i> ➤ <i>Creative Tourism;</i> ➤ <i>Food Tourism;</i> ➤ <i>Roots Tourism</i> <p><i>A key action will be to conduct appropriate market research to identify those products that will have the greatest return.</i></p>	<p>It is essential that there is continuous investment in consumer research to identify new consumer trends as well as competitor offerings, to allow Belfast to make informed decisions on product development and investment.</p>
<p>City Presentation and Design Initiatives Great cities are planned, nurtured, cared for and altered with pride and passion. This translates into how visitors experience them. Cities are also a series of connected places that give them distinctiveness and character. Some of these places are animated, lively, fun and well-dressed. They encourage visitors to move around and enjoy different experiences. The presentation of Belfast to its citizens and visitors must address these issues. Current improvements to public streets and spaces will help considerably but the programme must be extended beyond these</p>	<p>Belfast tourism needs an approach that recognises these vital aspects which will consolidate the feel or essence of the city, its history, culture and new vibrancy. This must reinforce a uniquely Belfast character – as reflected in the city brand. This is an important</p>

<p>commitments. Urban Design enhances the sense of place and gives a distinctive feel to Belfast. Belfast's award winning visitor signage schemes must be kept up to date and standards maintained.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Continue development of public spaces, greenways and public art to consistent standards</i> ➤ <i>Maintain & continuously improve signage across the city</i> ➤ <i>Underpin improvements with an awareness and civic pride campaign</i> ➤ <i>Establish a City Design Panel to advise on specific projects and oversee design competitions.</i> ➤ <i>Maintain a high standard of street furniture and dressing.</i> ➤ <i>Adopt a more effective response to litter, graffiti and general lack of cleanliness</i> ➤ <i>Enhance street entertainment through incentives and an annual festival or competition</i> 	<p>part of the Vision.</p>
<p>National Stadia & Sports Facilities</p> <p>These should be located in Belfast. The scale will be smaller than other national stadia in the British Isles however would provide the type of facility expected in a capital city. However, such facilities are likely to have an ancillary rather than leading role in tourism and not have the same impact as one of the Visionary Drivers. International standard sports facilities are essential for the city to attract top quality events such as athletics. A new velodrome, basketball/volleyball centre and tennis centre are important requirements.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Upgrade of existing stadia by the three main sporting bodies.</i> ➤ <i>Accept national stadium as a long-term project</i> ➤ <i>Decision by DCAL and BCC following a consultants report on location options</i> ➤ <i>Continue to work towards improving the range of key sports facilities in Belfast.</i> 	<p>Sports facilities will attract some international events but is likely to have a supportive rather than a major impact on achieving the Vision. Key sports facilities for cycling, tennis, basketball and volleyball will add to Belfast's attractiveness for international sport.</p>
<p>Events</p> <p>Belfast hosts spectacular events such as the World Cross Country Championships, the World Amateur Boxing Championships, The World Irish Dancing Championships, Tall Ships Race and the forthcoming World Fire & Police Games. A continual events programme is essential but a balance must be struck to ensure regularity of repeatable significant events against costly one-offs. There is a need to develop events linked to Belfast's distinctiveness e.g. Culture Night initiated in September 2009 was success worthy of repeating. The City Carnival offers potential to showcase Belfast's rich cultural offer. Events often provide a catalyst for innovative tourism developments and should be used as a platform to pilot tourism/visitor initiatives in the city e.g. city branded visitor welcome programmes.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Support for the objectives of the City Events Unit:</i> <ul style="list-style-type: none"> <i>(1) to deliver a programme of annual events, including one major high quality event each year;</i> <i>and (2) to increase the innovative nature of events by developing three by 2013 that are unique to Belfast and which can be seen as signature events for the city</i> ➤ <i>Harmonise BCC events Strategy with NITB's new events approach.</i> 	<p>Potential economic benefit and image development must be key considerations in future planning for major events.</p> <p>As well as generating economic benefits, events also contribute to the Vision by increasing the reasons to visit to Belfast, especially for unique experiences.</p>

<p>➤ <i>Maximise the Titanic and London Olympics 2012 opportunity with a high quality annual events programme throughout the city starting in 2011.</i></p>	
<p>Green and Open Spaces City parks and open spaces where locals and visitors can relax are key features of urban tourism. The North Foreshore presents an opportunity to expand green spaces. Current proposals for this reclaimed land include public art, walkways, cycleways, viewing towers, an education centre, eco-friendly pavilion, bird hides, play areas, festival space, pitches and recycling projects.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Carry out further analysis of how to realise the North Foreshore site's potential to provide an iconic attraction with international appeal and distinctiveness;</i> ➤ <i>Keep green spaces at the forefront of development planning;</i> ➤ <i>Maximise tourism use of city parks.</i> 	<p>Green and open spaces provide attractions in themselves to visitors and enhance the city experience. The North Foreshore area as currently proposed would be a major asset for the citizens of Belfast. To reach iconic status and to achieve higher impact as a key element of what attracts visitors to the city needs more careful consideration and definition.</p>
<p>Tourism in the Community Belfast is unique in having a tourism product in its outer areas that is linked to the city's recent history. Work to extend the appeal and to engage with visitors at a local level is important. Support, therefore, is given to new tourism services and activities in these outer areas (e.g. peace wall art; local information centres; tourism entrepreneurship; and working with tour guides). Much of this will be captured through the Tourism Place Destinations.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Implementation of the Outer Areas Strategy within the context of Tourism Place Destinations and beyond.</i> ➤ <i>Encourage innovative opportunities for visitors to interact at a local level</i> 	<p>Visits to the outer areas where community tourism is focused add to the tapestry of things to experience and help to spread the benefits of tourism when visitors actually stop there. Meeting the locals and a distinctive Belfast flavour are the essence of the outer areas and, as such, they contribute significantly to the Vision.</p>
<p>Business Tourism In addition to the key Visionary Driver – a new or extended integrated Conference & Exhibition Centre – Belfast must continue to work smart in order to compete with other city destinations. To ensure business tourism remains at consistent levels on the short to medium term as new facilities are developed we offer value for money, distinctive experiences and have the ability to respond promptly to opportunities in the market place.</p> <p>Action Required:</p> <ul style="list-style-type: none"> ➤ <i>Increase the City's subvention fund to attract conferences as a priority;</i> ➤ <i>Maximise the return from all conferences to the city;</i> ➤ <i>Further develop the concept of the city conference planner;</i> ➤ <i>Examine new opportunities for incentive venues;</i> ➤ <i>Develop high quality experiences suitable for delegates and partners;</i> ➤ <i>Develop a strategy to turn business delegates into leisure visitors.</i> 	<p>Belfast needs to ensure that the city works for the business visitor. Belfast needs to be a connected city offering a range of distinct venues, high quality accommodation and dining experiences. All of these taken together provide a healthy rewarding environment for business tourism.</p>

INFRASTRUCTURE, SERVICES AND ENVIRONMENT

Infrastructure, Services and Environment: Description	Contribution and Impact
<p>Destination and Gateway - Air and Sea Services Improved access to the city is essential if it is to attract more visits from international markets and if Belfast is to realise its Gateway potential. Air and sea access from GB is comprehensive but mainland Europe air routes have had a difficult time. It may be necessary to incentivise access to key European markets.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Ensure key European markets have direct air access.</i> ➤ <i>Examine opportunities for new air route development via marketing support initiative driven by central government</i> ➤ <i>Encourage investment by sea carriers.</i> ➤ <i>Promote better rail-bus connectivity and more on-line rail booking.</i> 	<p>Access services have a critical role. Achieving the Vision depends on attracting more visitors.</p> <p>Continued and successful access improvements will strengthen the Gateway role of Belfast even further.</p>
<p>Internal Transport and Movement There has been recent progress in encouraging visitors to use public transport to and within the city. The growth in sightseeing tours has also had a major impact. BCC has promoted a range of walking trails and cycling can also contribute to connectivity. However, further improvement in connecting various parts of the city, including the Tourism Place Destinations is essential – connectivity is the key.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Ensure that the new Rapid Transport System and other initiatives provide efficient links between visitor attractions and facilities.</i> ➤ <i>Promote and implement connectivity improvements in accordance with the Spatial Plan;</i> ➤ <i>Provide better connections between Tourism Place Destinations and key attractions;</i> ➤ <i>Investigate use of river as a traffic artery.</i> 	<p>Belfast is a relatively small city with much of its tourism assets within walking distance of each other. However, ease of movement and attractive routes are essential if visitors are to get the most out of what it offers, as expected by the Vision.</p> <p>Opportunities for movement along the river using it to connect places of interest would have great tourism appeal.</p>
<p>Visitor Facilities and Services The need for new and improved attractions has already been addressed. The city must offer a full range of services for visitors, including a higher profile and efficient Welcome Centre with a comprehensive range of facilities and services. The private sector must deliver services such as tours, guides, and hire in a professional way.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Ensure provision of a world class Welcome Centre that reflects the Gateway role of the city.</i> ➤ <i>Encourage private sector tourism services of a high standard including pubs and restaurants</i> ➤ <i>Explore opportunities of developing a Quality Stamp linked to Belfast Brand</i> ➤ <i>Ensure signage is maintained and upgraded where necessary.</i> 	<p>Ensuring a high quality, range and standard of services and facilities is essential to making sure that visitors have a comfortable and memorable experience in Belfast.</p>
<p>Tourist Accommodation Future accommodation priorities for the City are to spread the supply wider across the whole urban</p>	<p>The needs analysis carried out for accommodation in the city indicates a</p>

<p>area and to meet the changing demands for apart-hotels, boutique hotels and guesthouses. Belfast has experienced substantial growth in hotel rooms in the past five years and currently there is a pause with the economic downturn. Further growth will depend on improved economic conditions.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Encouraging developments that respond to known gaps and locational deficiencies (e.g. outside the city centre).</i> ➤ <i>Monitoring the demand for new rooms on an ongoing basis.</i> 	<p>requirement of 850 new rooms if the target of 20% increase in nights is achieved by 2013. Lower growth of 15% or 10% means requirements of 471 or 129 additional rooms. Source markets will help determine the accommodation type. For example, European visitors to Ireland have a preference for Guest House/B&B accommodation.</p>
<p>Evening and Sunday Economy</p> <p>Extended retail hours, a café culture and a fun environment give a feel to a city that encourages visitors and adds to their enjoyment. Restaurants, pubs and all food outlets should be memorable visitor experiences day and night and all weekend. The café culture must be developed in a safe environment and with the cultural sector providing reasons for visitors and locals alike to share and enjoy a thriving pulsating city. Night time economy needs further emphasis and development to ensure a safe well regulated environment.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Support the Evening Economy initiative and explore Night Time Economy initiatives</i> ➤ <i>Encourage more Sunday opening.</i> ➤ <i>Develop the café culture with cultural sector support including lobbying for legislative changes</i> ➤ <i>Support existing markets and identify gaps in provision</i> 	<p>A thriving evening and Sunday economy is essential to a successful tourism destination.</p>
<p>Retailing</p> <p>Belfast has had a golden period of retail development. However, even more development is essential for the city centre, including Royal Exchange, which will transform a run-down part of the centre, and other projects that will encourage speciality and independent traders. Independent traders can help provide a retail offer unique to Belfast and help to differentiate it from other destinations. The Tourism Place Destinations in the city can be enhanced through the retail offer differentiating them from other places.</p> <p>Actions Required:</p> <ul style="list-style-type: none"> ➤ <i>Support the Royal Exchange proposals;</i> ➤ <i>Help to identify other opportunities for development across the city, especially for tourism-related retailing (e.g. speciality traders, more authentic experiences).</i> 	<p>Nearly half of all visitors to the city do some shopping in the centre. It is, therefore, an important asset for tourism. It is also a major motivator of day trips, particularly for cross-border visitors.</p> <p>Independent retailers add to a City's authenticity.</p>

MARKETING

The ambitions of the strategic framework can only be met if a successful marketing strategy and plan are implemented. Such a plan will evolve and change over time to respond to prevailing circumstances relating to access, exchange rates, products, accommodation supply and market demands.

The Marketing Context – *this is the environment in which the marketing of the city – and its tourism development – will take place in the next five years and on. It is a context which at the moment provides major challenges in continuing the growth path of recent years as the economies of the world struggle and tourism numbers fall everywhere. Contextual factors also include a marketing revolution driven by continuously evolving information technology and web based platforms. Traditional marketing of tourism is fast been replaced by new techniques and channels forcing destinations to quickly adapt to change. Also of significance is the growing dominance of low cost carriers that provide a range of air services on a point to point basis, opening and closing routes with alacrity. This too shapes the marketing approaches taken and the ability to react swiftly to new opportunities.*

The longer term **marketing objectives** of this strategic framework are:

- ✓ To communicate the vision and the brand strengths to the key markets;
- ✓ To position Belfast as a 'must visit' city in Ireland - to experience its unique appeal, character and heritage;
- ✓ To place Belfast as a leading business tourism destination with top quality facilities for conferences and exhibitions;
- ✓ To ensure that Belfast is associated with top class events and entertainment and as a lively and fun year-round destination;
- ✓ To portray Belfast as a convenient and welcoming Gateway to the island of Ireland and a practical tourism base;
- ✓ To promote the Belfast as an alternative 'marquee' port for cruise tourism to Ireland.

These objectives need to be disseminated and shared through the marketing and communications strategies and plans of all the partners, with the Belfast brand integrated into the message. New and improved tourism products and visitor experiences coming on stream will provide valuable opportunities to communicate a steady flow of inspiring reasons to visit, thereby ensuring a continuing air of excitement and promise.

Tourism marketing also contributes to the wider projection of the city's image which in turn enhances investment prospects and the greater economy. Events marketing, in particular, can add great value through image enhancement.

The competitive advantages and marketing challenges for Belfast currently include:

Competitive Advantages	Marketing Challenges
<ul style="list-style-type: none"> ➤ A city in transformation - continuing novelty/curiosity factor ➤ Major transformational projects ➤ Currency value ➤ Authentic feel of a capital city ➤ Calendar of events ➤ Titanic Quarter & heritage ➤ Vibrant city reputation ➤ BVCB – mature public/private partnership ➤ Belfast Brand ➤ Good and improving access ➤ Port facilities & maritime links for cruise tourism 	<ul style="list-style-type: none"> ➤ Range of European cities vying for market share ➤ Achieving stand out in a crowded marketplace ➤ Choosing & prioritising best opportunities across markets & segments ➤ Scale of tourism industry in short term ➤ Achieving partnership buy-in to maximise effectiveness of marketing budgets ➤ Maintenance of price advantage ➤ Changing air access ➤ Range of agencies with responsibility for marketing Belfast

Setting Priorities



This pyramid illustrates the comparative value of different types of visitor to an urban destination. Business visitors have highest spend per day and per visit. They are followed in sequence down through different types down to day- visitors. A destination will therefore improve spend patterns by focusing on those segments which can contribute the most to the city's economy. Leisure tourism for Belfast is best if all of vacation nights are spent locally followed by the benefit from acting as a Gateway. All island leisure tourism will take third place although length of stay can determine exact benefit.

Where possible - marketing and sales strategies should be aligned with the pyramid. This will depend on the product on offer and the ability to target the most appropriate market segments effectively and efficiently.

This will be influenced by access and accommodation and the changing market trends such as the increase in short city breaks.

For Belfast, the marketing approach is also set in the context of Tourism Ireland's international marketing focus and NITB's approach to marketing within the island of Ireland.

Urban Spend Pyramid

The initial marketing strategy should focus on best prospect markets. The key aims are:

- Increase the number, length of stay and spend of visitors attracted to the city for short leisure breaks and destination-specific

- visits, including festivals and events.
- Expand the number of conferences and meetings, commensurate with facilities and capacity.
 - Penetrate the ROI & GB markets to attract more visitors and more bednights.
 - Maintain and grow the level of Northern Ireland stay-over visitors while continuing to grow the number of day visits, including cruise visits.
 - Expand the short break market from key European metropolitan areas with direct air access.
 - Expand the city's share of overseas touring visitors to Northern Ireland/island of Ireland, including achieving greater success in attracting gateway visitor traffic via Belfast ports of entry from Britain, mainland Europe, North America and further afield.

Different market elements need different approaches.

Business Tourism

Business tourism is a special focus for market development, targeted at the MICE (Meetings, Incentive, Conference and Exhibitions) segments and Associations. While improved conference and exhibition facilities are a priority objective, they may not be realised in the short term. In the meantime, business tourism offers a particular opportunity based on the attractive strengths provided by the range of hotels, particularly those with conference facilities. Key marketing needs to improve Belfast's competitiveness include:

- A conference development fund to help to compete for conferences;
- Development of Belfast Business Ambassador Programme;
- Maximising opportunities from secured conferences i.e. number of delegates, length of stay, partner programmes and repeat leisure trips
- A focus on quality standards and services;
- 'Luxury Belfast' programme aimed at the incentive market.

Destination Leisure Tourism

This market has grown substantially in the past five years. It is city tourism based and dominated by short breaks. Most value stems from the visitor using the city as a base to explore. It may however form part of an all island visit where a gateway in ROI has been used.

Key marketing needs to increase competitiveness are:

- Wide range of keenly priced accommodation;
- Wide range of attractive tourism product on offer;
- Easy access from all key markets;
- Effective communication to the market through all media channels;
- Stability.

Gateway Leisure

This is in effect a subset of destination leisure tourism but has better value to the economy as gateway visitors are more likely to stay longer and have a higher spend than those who enter through the ROI air and seaports. The essential element of gateway traffic is good air and sea connections. Competitiveness can be increased through:

- Frequent and competitive sea routes to GB;
- A comprehensive range of air services to major GB cities;
- Frequent air services to main European target markets – city pairs;
- Scheduled air services to USA and Canada.
- Co-operative and consistent marketing between Belfast/Carriers/Tourism Ireland

All Island Touring

There is still excellent growth potential in claiming an increased share of the all island touring market for leisure visitors. Northern Ireland and Belfast have still an opportunity for increasing the volume and value of this business.

Key marketing needs to improve Belfast's competitiveness include:

- Good communication of the product on offer and its quality and accessibility;
- Continuing liaison with tour operators, media commentators and through social and other new media;
- Clear communication of the brand and its desirability;
- Communication of the value message;
- Communication of the ease of visiting and of a welcome for all;
- Agree approach and budget with Tourism Ireland/NITB.

VFR – Visiting Friends & Relatives

This market had been the backbone of much of Belfast's tourism business for many years and still provides valuable stable business. It is a market that cannot be targeted except through improving knowledge of new tourism attractions, easy access – particularly low fares access and easily accessible information.

Key marketing needs to improve Belfast's competitiveness include:

- Good communication of the product on offer and its quality and accessibility;
- Communication of the brand appeal to both locals and their overseas extended families and friends;
- Wide range of good value air and sea fares;
- Wide range of access routes from traditional VFR markets – GB, USA, Canada and some other long haul;
- Communication of Belfast being a fun 'happening' place.
- Maximise PR opportunities around events and in particular 2012

Cruise Tourism

Belfast has made dramatic progress in cruise tourism in the past decade. The cruise tourism focus in the next three years – when the industry is consolidating in cold water cruising around the British Isles – is to:

- Maintain service standards and keep costs to cruise lines and passengers low;
- Maintain industry contacts;
- Continue promotion at current levels.
- Maximise spend opportunities from secured cruise market to Belfast
- Investment in cruise infrastructure

The completion of the Titanic Signature Project will provide a major reason to visit for cruise ships in 2012. New product is essential for cruise ship continuity each year and this links closely into the ambition of the strategic framework.

Day Trips

Like VFR the day trip market – almost entirely from Northern Ireland and ROI – is promoted through focused communications. The day visitor will be motivated to either shop, attend an event or visit an attraction. The ROI market focuses largely on shopping at the moment because of the currency benefit in doing so. All have a potential for conversion into overnight staying visitors depending on the length of journey undertaken.

The market requirements relating to day tripping focus on:

- Communication of the value message to the ROI market;
- Communication of ongoing opportunities and range of shopping available;
- Communication of events and of attractions;
- Clear value for money themes and practical pointers re parking, rail/bus services etc.

The initial marketing strategy should focus on best prospect markets. The key aims are:

- Increase the number, length of stay and spend of visitors attracted to the city for short leisure breaks and destination-specific visits, including festivals and events.
- Expand the number of conferences and meetings, commensurate with facilities and capacity.
- Penetrate the ROI & GB markets to attract more visitors and more bednights.
- Maintain and grow the level of Northern Ireland stay-over visitors while continuing to grow the number of day visits, including cruise visits.
- Expand the short break market from key European metropolitan areas with direct air access.
- Expand the city's share of overseas touring visitors to Northern Ireland/island of Ireland, including achieving greater success in attracting gateway visitor traffic via Belfast ports of entry from Britain, mainland Europe, North America and further afield.

The market segments that can bring best return for Belfast are examined below:

Market	Best Prospect Segments	Volume/Value	Characteristics	Priority
Northern Ireland	Day Trips City Breaks – Events	2008 Day Trip market valued at £130m overshadows other domestic markets.	Those furthest from Belfast will stay overnight particularly after events; Meetings business essential; Day trips - shopping and event led.	High - for bread and butter market
ROI	Day Trips; City Breaks; Affinity Groups Corporate Meetings VFR;	Core Market Potential 0.4m interested in visiting Northern Ireland. In 2008 worth some £70m	A growing and easily accessible market attracted by shopping and currency value. Corporate Meetings driven by industry.	High - to take advantage of currency strength;
GB	City breaks; Gateway holidays Affinity Groups; MICE ¹ VFR	24m holiday trips to non sun destinations. 3 out of 4 interested in visiting Ireland. GB market in 2008 worth £150m.	Business links give a solid market base. Extensive air and sea connections provide high potential. Reasons to visit still needed – value message from BVCB. Northern Ireland needs to be on rotation for UK associations	High – BVCB can get across a value message – better value than ROI for GB market. Need to work closely with Tourism Ireland.
Europe	Gateway Tourists; Island of Ireland tour itineraries; City Breaks	Germany – Outbound market of 10m holiday trips by air; almost 3 out of 4 interested in Ireland; France - Outbound market 17m holiday trips by air; over 2 out of 3 interested in Ireland. Worth some £14m in 2008.	Markets to Ireland increasingly short break driven therefore connections critical. These have reduced. France & Germany have greatest Ireland potential. Belfast Welcome Centre reports strong Italian and Spanish market – additional research required on European Markets for Belfast	Medium – access becoming restricted through key markets Increasing reliance on ROI gateways
Long-haul	Island of Ireland Tour Itineraries Gateway Tourists; VFR Affinity Groups.	North America worth £28m to Belfast in 2008 (10% of total value of incoming tourism) and Rest of World some £7m.	Gateway connections from USA and Canada – those where tourists arrive in Belfast to begin a Northern or All Ireland holiday	High – linked to Gateways & all island tours. Titanic Signature Project will be a key driver

¹ MICE – Meetings, Incentive, Conference and Exhibition

Communication

Themed Communications

Successful communications for a tourism destination often involve a *Big Idea* that grabs the imagination of the potential visitor and often encourages repeat visits. These Big Ideas are presented as *themes* that run for a period of time – usually a year – and which provide a consistent message that gives clear inspiration and motivation to the potential visitor and a call to action.

For Belfast this is an important communication message and one which has some urgency. This is because 2012 looms – Titanic year - when the centenary of the loss of this iconic vessel is noted through the opening of the Titanic Signature Project. To engage thoroughly on an international basis with the travel industry preliminary information for that year and its key events will be needed in 2010. Such an approach ensured maximum international exposure and the ability to provide a range of events and ‘happenings’ that can bring in new visitors over a sustained period of time. NITB is currently leading on a Titanic Marketing and Communications Plan which will require support from a range of stakeholders.

Ideally Belfast can develop an ongoing series of themes years or seasons so that there is continuous presence in the media and continuously refreshed reasons to visit.

2013 is the 400th Anniversary of the City’s Charter and this too presents a major opportunity to create a themed year with a series of specials events. There is a need to engage widely across the city on what themes are significant and which can bear the ‘weight’ of a yearlong series of events. BCC must lead the work in preparing the ground through quality analysis and then bring together key partners who will buy in to the themed message.

The adoption of a themed approach helps ensure ongoing success from Public Relations as a constant supply of news stories is available to the media across the world.

New Approaches to Communication

As traditional marketing methods for tourism decrease in importance, there is an opportunity to communicate Belfast’s Brand, and the improved products and services evolving from this strategy, in a highly cost-effective way through e-tourism. Current channels of communication such as direct consumer marketing, media publicity, consumer promotions and fairs and traditional brochures, whilst still important, will become of much less significance than on-line material.

The future balance of traditional publications versus on-line downloadable material must be kept under review. Traditional print will not disappear completely but can be scaled down significantly while TICs, for example, can print off material or have it available through self-help sites. However, some print material is essential as it can, through skilful design and quality print, have a greater impact in convincing a potential visitor to take a trip. Each piece of Belfast print must be critically reviewed to find the balance.

BVCB’s on-line presence must reflect the Belfast Brand and its strengths while linking closely with the Northern Ireland and Ireland brands. The range of products, services and experiences on offer must be shown to have the uniqueness, distinctiveness, variety and quality that will motivate people to make the visit.

The industry providers must, in turn, have comprehensive on-line material and product offers through both their own sites and key on-line agencies such as Expedia or Travelocity or Orbitz. Securing coverage of Belfast by travel partners and intermediaries will form an important strand of the city's marketing strategy. Plans must ensure that it is readily available to consumers in all target markets.

Belfast must also develop its own database of customers so that a valuable stock of contacts is available that may be used for e-marketing purposes. This Customer Relationship Management (CRM) is essential in developing communication and e-marketing.

But this is not enough – there is much more to do in new media. Belfast is under-served on the social web and with now a customer-to-customer (c2c) marketplace; there is an opportunity for public, private and social economy sectors to encourage interaction and exchange of information online.

Belfast is a young dynamic city but this is not mirrored in its online profile on Facebook, YouTube, Flickr and Twitter. There is an absence of RSS feeds, social bookmarks, blogs and podcasts linked to destination sites. All of these add to the dynamism of the city and its attraction as a vibrant destination. All can focus on proving that Belfast is '*bursting with energy and enthusiasm*' and offers '*distinct, varied and quality experiences*'.

It is the linkages into and through on-line and new media which are increasingly critical for Belfast and Northern Ireland and much future focus will be placed on getting a high profile and effective presence – not just from promotional bodies but from every tourism business, from past visitors and from commentators, journalists and bloggers.

VISITOR SERVICING AND MANAGEMENT

In 2008, 7.1 million visitor trips were made to Belfast. Visitor servicing and management is a key priority for the city to ensure it fulfils the Belfast brand promise of being a warm, vibrant and welcoming city.

Visitor servicing and management successes to date include;

- Belfast Welcome Centre: opened in 1999, Belfast's flagship TIC welcomes over 310,000 visitors and generates an income of £907,315 per annum;
- Gateway Tourist Information Centres at the George Best Belfast City Airport and Belfast International Airport;
- Award winning visitor signage scheme across the city centre.

Whilst Belfast has invested considerably in these areas and this is reflected in the high customer satisfaction of information provision and signage across the city, the direct relationship the city develops with the visitor will create a competitive edge.

Objectives

The future visitor servicing and management objectives for Belfast are:

1. To increase visitor spend in Belfast;
2. To provide visitors with a seamless Belfast experience;
3. To ensure front line services offer consistent high quality customer care;
4. To be at the forefront of technology in meeting visitor requirements.

Visitor Information Services

The Belfast Welcome Centre, currently located on first floor premises in the city centre, provides a focal point for visitors to Belfast, offering ticketing, retail, accommodation bookings as well as general information on Belfast and Northern Ireland. The two tourist information desks at the George Best Belfast City Airport and the Belfast International Airport offer visitors a welcome on arrival. Across the city, there are also visitor information points at Queen's University of Belfast, Spectrum Centre, Shankill and An Culturlann in West Belfast as well as a range of visitor attractions, restaurants and hotels that have the potential to provide information to the visitor. Advances in technology offer new ways of presenting information to visitors with the ability to download relevant localised information at the click of a button. Belfast needs to offer a balance of physical information provision which reinforces the welcome of the city with electronic information provision, ensuring visitors can access relevant information in the format they want through the medium they want.

Key priorities:

- Belfast Welcome Centre should be relocated to central, ground floor location to maximise footfall. Services at all tourist information centres/points should be reviewed in line with visitor requirements;
- A network of visitor servicing points to be developed across the city linking to Tourism Place Destinations
- A renewed focus on auditing, collating and presentation of relevant and up to date information on Belfast's tourism product;
- Establish an ICT working group of representatives from NITB, BVCB, BCC and other relevant industry members with aims – as original report.

Visitor Management Services

Belfast must ensure that visitors have a seamless experience in the city. Using public transport, booking concerts, taking a tour or dining out should be effortless. Belfast must be prepared for peak periods when cruise ships are berthed and international conferences are in the city.

Key priorities include

- Develop an online 3 – 5 year city planner for the industry tracking conferences, events and key developments
- Launch a Belfast Pass for attraction entrance, restaurant deals and special discounted tours.
- Work with the Industry to develop more Belfast specific packages
- Develop personal tourism greeter opportunities during peak periods
- Develop a Belfast Brand customer care initiative aimed at those who have a direct contact with the visitor including regular networking / ambassador type initiatives to improve two way communication on what visitors are looking for and what they think of the city.

Visitor Orientation

Belfast's current pedestrian signage provision is excellent in relation to interpretation and orientation. Traffic is directed via white on brown tourism signage and again, there have been considerable improvements in this area over the last number of years, including white on brown motorway signage for Belfast Zoo. As new products develop, signage must be constantly updated.

Key priorities include

- Preparation of new round of applications to NITB and Roads Service for brown signs (to reflect new attractions/ facilities and change in circumstances) and to identify requirements for more interpretative signing across tourism place destinations;
- Further consideration with Roads Service of the case for brown signing the BWC (which attracts over 300,000 visitors) and other key attractions on and from the motorways and key access routes into Belfast.

QUALITY STRATEGY

Providing quality experiences is at the heart of the vision for Belfast tourism. Quality assurance and standards are key elements of delivering such experiences and hence the strategy recognises the opportunity for BCC's Tourism Unit to act as a one-stop-shop to direct city businesses to appropriate training and quality solutions. This also aligns with NITB's quality strategy.

The following programmes are at the core of quality assurance and standards delivery and are keys to success:

Who?	What?
Future Skills Action Group (FSAG) for Hospitality and Tourism	FSAG Action Plan 2009 -Themes of skills provision, sector attractiveness & co-ordination, communication
Workforce Development Forums set up by DEL + 6 Regional Colleges	Identify skill needs of local economy and strategic response needed from training providers
People 1 st Sector Qualifications Strategy Blueprint for Action 2008-09	Ten priority areas
Belfast City Council	Harte Project
DEL – People 1st	Junior Chefs Academy

Improving quality requires a wide range of stakeholders to sign up to an agreed agenda for action. An immediate requirement is to establish a Hospitality and Tourism Forum for Belfast with a specific remit on quality and skills. It will need meaningful private sector representation and participation. Tourism is a people-based industry and aspiring to deliver consistent high class experiences is dependent on positioning it as a valued career option.

NITB and Belfast City Council are committed to achieving World Class Standards. The challenge is how to best implement a tourism quality mandate. Quality is linked to consumer trust. The potential first-time visitor is well informed, increasingly using social networking media to make holiday choices. The Belfast Brand still has the potential to influence destination choice but the delivery promise - the quality of the visitor experience - is under scrutiny.

Northern Ireland has a certification scheme for tourist accommodation which is legally based and is currently being updated. This process ensures that all tourist accommodation meets minimum standards. NITB is now in the process of also introducing a new voluntary quality development and grading scheme for all types of tourism accommodation from hotels to B&Bs. The AA is a partner in the project and it mirrors best practice in GB.

With Belfast the leading accommodation resource in Northern Ireland, co-operation in the successful introduction and coverage of this new scheme is essential in ensuring world class standards. Communications and training initiatives with providers in Belfast will be essential.

NITB also is committed to introducing voluntary quality development and ratings schemes across the tourism product including visitor attractions. This too will help ensure that the Belfast product meets standards that underpin the vision. The scheme will be rolled out

over a period of time.

The successful implementation of these schemes in Belfast is a top priority.

Any future skills development initiatives in Belfast need to be: enterprise led; available locally; incorporating flexible learning; fit for purpose and aligned to the Belfast brand and NITB's quality standards. The need is to focus on a 'can do' mindset that will continue to attract new and repeat visitors to Belfast. There are a number of agencies with an interest in the development of tourism in the City but an initial requirement is to streamline access to information on tourism training, skills, quality and standards. The BCC Tourism Unit is well positioned to take up this role.

MONITORING AND RESEARCH

Successful implementation of a major strategy requires constant effective monitoring to ensure that both momentum and direction are being maintained. Doing so requires focused research and reliable data to ensure that an accurate reflection of what is happening on the ground is available to those charged with strategic oversight.

The Belfast Tourism Monitor (BTM) provides the basis of most tourism data for the city covering both staying visitors and day visitors. This provides data measurement that equals that of comparative cities in the UK and Europe. The model used to prepare the data is both complex and multi-faceted. NITB also produces tourism data for Belfast, excluding day visitor estimates.

There are some discrepancies between the two sets of data, with BTM consistently recording greater levels of visitation and expenditure than NITB. It is recommended that Belfast City Council and NITB work together to harmonise the data. In addition, several detailed recommendations are proposed on methodology which would enhance the quality of the data, including encouraging the accommodation sector to provide consistent occupancy data.

The presentation of BTM data can also be made more effective for monitoring purposes through the following:

- ✓ Provide time series data showing trends over a five year period;
- ✓ Provide all year on year changes – for total visits, visitor nights and expenditure;
- ✓ Provide a full breakdown of visitors by Purpose of Visit – Day Visitor, Holiday, Business, VFR, Other;
- ✓ Provide a full breakdown of origin of visitors preferably showing Purpose of Visit.

This data enhancement will make monitoring easier and more effective.

In addition to enhanced statistical data, other areas in need of focus relate to visitor satisfaction, impact of marketing and monitoring of development. The cost effectiveness of undertaking this independently for Belfast is an issue. NITB undertakes Visitor Attitude Surveys every two years which examine visitor satisfaction and the most cost effective approach may be to co-ordinate and share with Belfast City Council. Similarly monitoring of effectiveness of marketing expenditure by BVCB should be a built-in process to every campaign. Development monitoring is the easiest to undertake through a process of twice-yearly examination of progress in the attractions, accommodation, services and related sectors.

Together these actions will provide a thorough base of research so that progress may be accurately monitored.

MANAGEMENT & CO-ORDINATION

Tourism growth in the way envisaged in this strategic framework will not be achieved without a concerted effort to make it happen. This requires two strands of action – implementation and engagement. Both should be tackled simultaneously and given a high priority by those who can facilitate change and prioritise investment.

Following the Review of Public Administration, Belfast City Council will have an enhanced range of functions, giving it a greater direct influence in shaping city development for tourism. This is a welcome change.

Three recommendations are presented here relating to high level co-ordination and overseeing, the tourism delivery body and day-to-day focus.

High Level Co-ordination – it is recommended that a Tourism Co-ordinating Group, chaired by the Lord Mayor, be established to oversee the implementation of the Strategy. It should meet no more than twice per year and should be focused at Chair, CE and senior civil servant level. The Group will receive progress reports on every aspect of the Strategy and take action where necessary to refocus and free up blockages. It will issue progress reports and provide media comment to ensure that tourism in Belfast maintains a high profile and to keep pressure on delivery against targets. The Group will be formed from BCC, NITB, BVCB, DETI, DRD, DSD, DCAL, DEL, Translink, NMNI, Sport NI, BHC and airports.

Tourism Delivery Body – as part of the review process, four options were examined for a tourism delivery body for Belfast. These were delivery by:

- a) the national tourist board;
- b) the city council;
- c) a trans-industry marketing organisation;
- d) a partnership.

The four models were examined in detail and the firm conclusion was that a partnership organisation focused on tourism provides the most effective structure for Belfast especially for marketing and visitor servicing. This reflects many European models and is considered best practice. It is recommended that Belfast Visitor & Convention Bureau maintains its current role and that Belfast City Council continues to lead on tourism development. RPA will give it a wider remit which will enhance this role.

Day-to-Day Focus – while the high level committee can realistically meet twice per year, this alone will not keep pressure on delivery of the strategy. It is recommended, therefore, that a *Strategy Implementation Team* of officials is established which will be charged with servicing the Tourism Co-ordinating Group and keeping track of all aspects of the strategy; giving early warning of issues arising; providing linkages at officer level within the framework of agencies and departments; and creating a network of committed individuals well-versed in the strategy and its vision.

It is recommended that Belfast City Council chairs this Officer's Team which will have in its core membership BVCB, NITB and DETI. Ideally, all contributing Government Departments and agencies should be members but a more practical approach may involve attendance on a project or need basis. The Group should meet at least five times per year and report to the Tourism Co-ordinating Group. The skill will be in adding value rather than being seen to be simply a reporting group – through a problem solving and action orientated approach.

At a micro level, within Belfast City Council, there are many departments and units which have a role to play in delivering this strategic framework – Parks and Amenities including Belfast Zoo, Events, Waterfront Hall, Ulster Hall, Environmental Health, Building control, Creative Industries and Economic Development, Planning and Transport, Policy and Projects and so on. With the RPA there is a renewed focus on efficiency and working smarter. A key role for BCC's Tourism Unit will be to combine the resources across the council to work towards fulfilling the vision set out within this document.

LEADERSHIP

The delivery of an effective strategy requires the engagement and involvement of the private sector throughout the city and region if the brand promises are to be realised. Tourism is currently receiving a high profile and, therefore, there is a danger in simply providing more industry meetings or newsletters exhorting greater efforts. It is recommended that BVCB builds on its private sector membership to address specific issues that are essential in providing a top class visitor experience. Meeting wear-out is an issue with the private sector and consideration should be given to virtual forums/ industry intranet These should include:

- Tourism Quality Forum – giving feedback on quality issues and recommending strategies to overcome them – this may cover staffing, training, infrastructure;
- Customer Contact Forum – as detailed under Visitor Servicing;
- ICT Forum – as detailed under Visitor Servicing.

The inspiration to the industry must come from the top and therefore the Lord Mayor's bi-annual reports, following the Tourism Co-ordination Group meetings will act as a rationale for media appearances and debate. As Belfast's private sector forms the bulk of the Northern Ireland tourism industry, careful orchestration with NITB is necessary to ensure that there is a flow of information and challenges that are regular but non repetitive.