



<b>Report to:</b>	Special Development Committee
<b>Subject:</b>	Tourism Ireland and Northern Ireland Tourist Board
<b>Date:</b>	18 December 2012
<b>Reporting Officer:</b>	John McGrillen, Director of Development, ext 3470
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<b>1</b>	<b>Relevant Background Information</b>
1.1	At Development Committee on 20 November 2012, Members considered a report on The Gathering and agreed to invite presentations from Tourism Ireland and Northern Ireland Tourist Board to understand how Belfast would maximise this and other emerging tourism opportunities in 2013 and beyond.
1.2	NITB is a non-departmental public body of the Department of Enterprise, Trade and Investment. It is responsible for the development of tourism and the marketing of Northern Ireland as a tourist destination to domestic tourists, from within Northern Ireland, and to visitors from the Republic of Ireland.
1.3	NITB manages the Tourism Development Scheme (TDS) which will provide financial support for the Belfast Welcome Centre relocation (£747,000) and the Waterfront Hall extension (£2million). NITB operates the Tourism Events Fund (two streams to support International events and National events) which supported Belfast to attract MTV European Music Awards in 2011 and the Titanic Festival in 2012. Council's application for the Maritime Festival in 2013 is still being assessed. NITB also has a Product Development team which liaises closely with Council's Tourism, Culture and Arts Unit to support product related initiatives such as Belfast Music Week and Belfast Restaurant Week.
1.4	NITB currently provides direct support to Belfast via a Service Level Agreement with Belfast Visitor and Convention Bureau worth £416,500.
1.5	Tourism Ireland was established under the framework of the Belfast Agreement of Good Friday 1998. It is jointly funded by the Irish Government and the Northern Ireland Executive on a two to one ratio, and operates under the auspices of the North/South Ministerial Council through the Department of

	Enterprise, Trade and Investment in Northern Ireland and the Department of Tourism, Culture and Sport in the South.
1.6	Tourism Ireland employs 160 people in key source markets, such as Great Britain, USA and Canada, France, Germany, the Netherlands, Denmark, Belgium, Italy, Spain, Austria, Switzerland and Australia. Tourism Ireland also has offices in Coleraine and Dublin – and has now extended its reach to include emerging tourist markets, such as Japan, South Africa, New Zealand, China, India, Poland, Asia and the Middle East.
1.7	Tourism Ireland invests significantly in joint marketing initiatives with Belfast e.g. in 2012, Tourism Ireland contributed £116,000 to BVCB for joint carrier campaigns and in October, Tourism Ireland supported Council to stage a launch of Belfast Music Week in London.
1.8	BVCB promotes Belfast as a tourism destination and delivers visitor servicing activity through the Belfast Welcome Centre and two airport tourist information centres. Council recognises BVCB as the preferred conduit for promoting the city to the short break, cruise and business tourism markets and contributes £1.8million towards BVCB per annum. They are currently preparing their Business Plan for 2013/14 and due to present to Development Committee in February 2013.

<b>2</b>	<b>Key Issues</b>
2.1	In 2011, the Belfast Tourism Monitor reported that there were 1.58 million overnight trips to Belfast. The value of direct tourism spend in Belfast was estimated at £401 million of which out of state tourists contributed £215 million. In terms of overnight visitors, Northern Ireland market represented 27% of total nights spent in the city; Republic of Ireland – 38% and Great Britain – 27%. Overall these 3 markets generate 92% of overnight visits to Belfast.
2.2	During 2011 and 2012 a number of key research projects were completed on the ROI, NI and GB markets recognising that they were failing to realise their full potential and only if this was addressed, would Northern Ireland fulfil the targets set within the Programme for Government; to grow visitor numbers to 4.2 million and tourist revenue to £676 million by December 2014.
2.3	NITB has summarised the findings of this research within the attached report, Northern Ireland Tourism Priorities for Growth October 2012 (see Appendix 1).
2.4	In summary, this report highlights that there are a number of ‘best prospect’ consumer segments requiring dedicated communication channels. These are highlighted in Table 1 below.
2.5	The approach to targeting these segments is to develop and promote ‘experiences’. Building on the work completed through the development of the signature projects, NITB is proposing ‘signature experiences’ supported by clusters of similar product and services. The key experiences are identified in Table 2 and the relevance to Belfast highlighted in bold.

2.6

**Table 1 Consumer Segments – ‘Best Prospects for Northern Ireland’**

Consumer Segments	Market	What they are looking for	Communication Channels
Social energisers	GB	Action Packed days as well as fun filled nights	TV, Video on Demand, Cinema, Radio and Social
Curiously Cultural	GB	Want to discover culture for themselves	Press, TV, Radio and Outdoor
Great Escapers	GB	Want to immerse themselves in nature	No direct advertising to this segment – PR and Social
Time Together	ROI and NI	Interested in romantic breaks and spending quality time as a couple	Local TV and radio, press, web and social
Family Fun	ROI and NI	Interested in breaks that keep their children amused whilst giving them an opportunity to relax	Local radio, TV, Press and social
Mature Cosmopolitans	ROI and NI	Aspire to travel more and have the time and money to do so but are looking for good deals	Local TV, sky sports, press and radio
Young and Lively	ROI	Interested in urban breaks, often taken with friends	Digital TV, music radio, web, digital and social

2.7

**Table 2 Signature and Supporting Experiences**

<p>Living Legends</p> <p>Signature: <b>Titanic and Maritime</b>, Saints and Scholars, Walled City</p> <p>Supporting: <b>Titanic, Maritime</b>, St Patrick’s, <b>Christian Heritage</b>, Walled City, <b>Key Museums and Attractions, Literary, Industrial Heritage, Genealogy, NI Heroes, Built Heritage</b></p>	<p>Coasts and Lakes</p> <p>Signature: Coastal routes, Fermanagh Lakes</p> <p>Supporting: Causeway Coastal Route, Mourne Coastal Route, Cruising, Angling, Hub towns, Coastal resorts</p>	<p>Unique Outdoors</p> <p>Signature: Links Golf, Adventure Playground</p> <p>Supporting: Links golf, <b>Parkland golf, Mountain Biking, Canoe Trails, Adrenaline Activity, Walking, Cycling, Surfing</b></p>
<p>Culture and Creative Vibe</p> <p>Signature: <b>Belfast Experience</b> Derry/Londonderry Experience</p> <p>Supporting: <b>Theatre, street art, music/film, pubs and restaurants, café culture, tours, shopping, art galleries, city quarters, reconciliation tourism, public realm, nightlife, business tourism zones, Hallmark events</b></p>	<p>Naturally NI</p> <p>Signature: <b>Food and Drink, Living Landscape</b>, Wonderful Wildlife</p> <p>Supporting: <b>Unique NI product, cookery schools</b>, Bushmills Distillery, <b>St George’s Market, Linen</b>, Gardens, Wildlife, Geology, open farms, national parks, rural arts and crafts, markets and fairs, culture</p>	

2.8	Both Tourism Ireland and NITB spend significant budgets on promoting Northern Ireland in the NI, ROI and GB markets. This reached new heights in 2012 with the Northern Ireland - Our Time, Our Place campaign. It is clear from the above research that Belfast will continue to be a key driver to target these 'best prospect' markets. Given Council's investment into marketing Belfast via BVCB, it is crucial that NITB, Tourism Ireland, Belfast City Council and BVCB's marketing activity is aligned.
2.9	To date Council has an agreed Tourism Framework 2010–2014 with NITB which is monitored by the Belfast Tourism Forum. Both Tourism Ireland and NITB sit on this Forum. This works well to align infrastructure and key event led initiatives such as 2012, however there is a risk that given the prominence of the Belfast experience in the segmentation results, there could be duplication around marketing and promotion which needs further attention.
2.10	A significant development within the attached research is the prominence of younger markets; 'social energisers' and 'young and lively'. Belfast and Dublin will be the main attractors for these markets and the report highlights the importance of social media. BVCB must become a leader in this field, underpinning Council's strategic investment in the urban broadband project.
2.11	Members are reminded that Council is leading on the development of Local Tourism Destinations across the city. To date we have developed 5 draft local action plans for Cathedral Quarter, Gaeltacht Quarter, Queen's Quarter and Lisburn Road and Shankill Quarter and a further plan is being progressed in the East. These plans highlight the infrastructure, product and service requirements for each destination. Officers plan to finalise these plans and hold a workshop for these areas to identifying city wide signature experiences which reflect the best prospect markets. A report will be tabled for Development Committee in early 2013.
2.12	Finally, Members wished to explore opportunities for promoting Belfast as part of The Gathering initiative. Both Tourism Ireland and NITB have been advised to identify opportunities for Belfast within their presentations to Committee.

<b>3</b>	<b>Resource Implications</b>
3.1	There are no immediate resource implications, however the work of Tourism Ireland and NITB may inform how BVCB's budget is allocated, including Council's contribution of £1.8 million.

<b>4</b>	<b>Equality and Good Relations Considerations</b>
4.1	There are no Equality and Good Relations Considerations attached to this report.

<b>5</b>	<b>Recommendations</b>
5.1	Members are asked to note the contents of this report.

<b>6</b>	<b>Decision Tracking</b>
BVCB to present 2013/14 Business Plan.	
Timeframe: February 2013	
Reporting Officer: Shirley McCay	

<b>7</b>	<b>Key to Abbreviations</b>
BVCB - Belfast Visitor and Convention Bureau	
NITB - Northern Ireland Tourist Board	
TIL - Tourism Ireland Limited	

<b>8</b>	<b>Documents Attached</b>
Appendix 1 - Northern Ireland Tourism Priorities for Growth 2012	