



Belfast City Council

Report to:	Development Committee
Subject:	Tourism Strategy Development 2014
Date:	September 2013
Reporting Officer:	John McGrillen, Director of Development
Contact Officer:	Ms Shirley McCay, Head of Economic Initiatives & International Development

1	Relevant Background Information
1.1	Members will be aware of the current Belfast Integrated Tourism Strategic Framework 2010-2014 which has shaped Belfast City Council's approach to tourism over this period of time.
1.2	The fundamentals of the strategy have been delivered with some elements due for completion between now and the end of the current financial year. This document was developed and delivered in partnership with key agencies across the City. A full review of this will be brought back for Committee consideration early in January 2014.
1.3	Regular progress reports have been communicated throughout the lifespan of the strategy. One of the platforms responsible for monitoring progress against actions has been the Belfast Tourism Forum which includes representatives from Government Departments, NITB, Tourism Ireland, as well as industry bodies and the destinations across the City. The Tourism Forum has provided an invaluable role in assisting with delivery and oversight for the strategy.
1.4	The strategy will be implemented by March 2014, so there will be a need for a new integrated tourism strategy to be developed in a partnership approach across the City and with relevant agencies.

2	Key Issues
2.1	<p>During the period of the current Belfast Integrated Tourism Strategic Framework the landscape of the City has changed considerably. Large scale developments including Titanic Belfast have transformed the City and the 2012 experience in the City has been widely acknowledged as a resounding success.</p>
2.2	<p>Belfast's position as a truly International City Destination is undisputed with a number of awards being achieved during the period of the strategy. The next strategy must keep Belfast developing along this path being realistic but also aspiring to make huge strides forward.</p>
2.3	<p>The Belfast Tourism Monitor indicates that the value of direct tourism spend during 2012 was £416million, with 7.59m visitor trips to Belfast.</p>
2.4	<p>While the Belfast figures appear healthy there is a cautionary note in that the overall Northern Ireland context has been fairly static in terms of visitor numbers and economic return from tourism. A recent statement by the Board of NITB has raised concerns as to whether the figures outlined in the DETI strategy for tourism can be realised by 2020. While figures for the ROI are showing a resurgence with some commentators suggesting a 6% increase in visitor numbers in the last year this has not been the case for Northern Ireland. The GB market in particular has been in decline since 2005.</p>
2.5	<p>In 2011/12 NITB and Tourism Ireland undertook an extensive piece of work into the source markets for Northern Ireland. This research has provided very detailed market analysis and segmentation that will need to be fully integrated and acknowledged in any new integrated tourism strategy going forward for Belfast. This along with the Belfast Tourism Monitor will shape the discussions around all elements of the new strategy particularly product development, marketing and visitor servicing.</p>
2.6	<p>The strategy should look at a number of elements including some of the following issues;</p> <ul style="list-style-type: none"> <li data-bbox="347 1440 1359 1574">• Product Development; One of the Council's core roles with respect to tourism is product development. This will be a mix of soft product development but potentially further large scale development. The strategy should identify these projects in line with customer demand. <li data-bbox="347 1608 1359 1742">• Marketing & Promotion; Taking on board extensive segmentation research developed by NITB and Tourism Ireland last year and ensuring delivery roles are clarified between Visit Belfast, NITB and Tourism Ireland. <li data-bbox="347 1821 1359 2056">• Visitor Servicing; a significant review is required of all elements of the visitor experience such as; positioning of the Welcome Centre; the Visitor pass phase 2; airport information provision; information provision at Titanic Belfast and across the destinations; cruise passenger management being mindful of new developments by the Harbour Commissioners; use of new technologies in enhancing the visitor experience.

	<ul style="list-style-type: none"> • Destinations; ongoing analysis and work required to develop the designated destinations to ensure the economic impact of tourism is spread across the City. • Accommodation review; If Northern Ireland 2020 targets are to be achieved there is a need for further hotel bedstock within the City. Over the period of the current strategy hotel bedstock has grown significantly, however the aspiration is for further developments. • Partnership working; There is a need to review partnerships across the City in respect of tourism to provide clarity on roles. The NITB is currently undergoing a review and it will be important that this strategy makes consideration for this; Tourism Ireland's role for Northern Ireland specifically continues to evolve, this role too needs explored to maximise benefits; Visit Belfast's role in the City is currently focussed on visitor servicing and promotion. Visit Belfast as key delivery partners role should be maximised; how we engage with the private sector to ensure every opportunity is taken to create business opportunities and to support future developments from the sector. • Business Tourism; A fresh approach is required to ensure that the new developments at the Waterfront hall and the opportunity that gives to attract much larger conferences should be integrated into plans. Checking that the suitable support infrastructure is in place to deliver an integrated high quality experience for business visitors to the City. • Internal integration; ensuring all activity within the Council is aligned and specifically within the TCA unit ensuring that the cultural groups supported are fully integrated into the visitor experience. • RPA; Looking at any potential opportunities and implications that RPA will bring. • Targets and Monitoring <p>The outlined list is not exhaustive but reflects a tourism landscape that has changed considerably and continues to evolve. It is important that Belfast City Council are shown to display leadership in respect of tourism and culture working to the optimum with partner agencies.</p>
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3	Resource Implications
3.1	A maximum budget of £40,000 from Council is proposed to be matched by a contribution from NITB.

4	Equality and Good Relations Implications
4.1	No specific equality or good relations considerations

5	Recommendations
5.1	Members are asked to: Give approval to proceed with procurement and commissioning of an agency to work with Officers within the TCA Unit to develop a new Integrated Tourism Strategy

6	Decision Tracking
	It is recommended that upon appointment of the Consultants the Development Committee is continually consulted and updated on progress.