



Subject:	Northern Ireland Affairs Committee Inquiry into Tourism in Northern Ireland
Date:	12 April 2019
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Lisa Toland, Head of Economic Initiatives and International Development

Restricted Reports	
Is this report restricted?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
If Yes, when will the report become unrestricted?	
After Committee Decision	<input type="checkbox"/>
After Council Decision	<input type="checkbox"/>
Some time in the future	<input type="checkbox"/>
Never	<input type="checkbox"/>

Call-in	
Is the decision eligible for Call-in?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of the report is to advise the Committee of an inquiry by the Northern Ireland Affairs Committee of the UK Government on tourism in Northern Ireland and to seek approval for the key elements of a Council response. This response will be subject to engagement with other partner organisations in order to ensure alignment and consistency in support of the Belfast position.

1.2	The official deadline for submissions is 18 April 2019. However, the NI Affairs Committee has agreed to an extension until early May 2019 to allow time for additional liaison with our partner organisations.
2.0	Recommendations
2.1	<p>The Committee is asked to:</p> <ul style="list-style-type: none"> • Agree that a full response is developed along the lines set out in section 3.3. below • Consider any additions or amendments that they wish to see incorporated in the final Council response • Agree that officers should continue to liaise with our strategic partners including Tourism NI, Visit Belfast, ICC Belfast and Northern Ireland Statistics Research Agency, to ensure consistency in our responses and to put forward the best case for Belfast • Agree that authority is delegated to the Director of Economic Development to submit the final version of the response within the timeframe set out by the Northern Ireland Affairs Committee.
3.0	Main report
3.1	<p>The Northern Ireland Affairs Committee has recently launched an Inquiry examining the importance of tourism to the economy and society of Northern Ireland more widely and to investigate ways in which the industry could be improved or further supported. Specifically, the Inquiry has invited written submissions pertaining to:</p> <ul style="list-style-type: none"> • The economic and societal impact of the tourism industry in Northern Ireland • Transport links to Northern Ireland • The promotion of Northern Ireland as a destination.
3.2	<p>Officers are liaising with our strategic partners (ICC Belfast, Visit Belfast and Tourism NI) who have specific expertise and information relating to the areas set out in the scope of the inquiry. While each of the partners is working on their own individual responses, Council officers are engaging with them all to ensure that the response from the Council is consistent with the key messages and draws out the specific challenges and opportunities for Belfast.</p>
3.3	<p>In terms of headline commentary, it is proposed that the Council response covers the following key points:</p>

The economic and societal impact of the tourism industry in Northern Ireland

- The growth of tourism has been critical to Belfast's improved economic performance, particularly over the last two decades
- Belfast is the key regional driver for tourism in the region. The last Local Government District tourism statistics published by the Northern Ireland Statistics and Research Agency in 2017 indicated that Belfast generated 30% of all overnight tourism trips to Northern Ireland (1.5m trips) and tourism spend on overnight trips amounted to £328m, 35% of Northern Ireland tourism spend
- The city's contribution to the region's visitor economy increases to 44% when analysing spend from visitors originating from outside Northern Ireland
- Jobs supported in the tourism sector in Belfast are 18,600 which is 30% of all tourism jobs in Northern Ireland
- Overnight business trips account for 15% of bednights compared with 9% for NI as a whole
- Belfast City Region Deal partners welcome the recent Treasury investment in tourism as part of the wider programme of investment for the city region. The inclusion of tourism as a key growth sector represents an acknowledgement of the importance of this sector to the city (and region's) future economic growth. This investment will both enhance productivity in the sector and provide opportunities for new product development, which can have positive economic and social impacts on local communities.

Transport links to Northern Ireland

- Belfast is directly served by two airports, George Best Belfast City Airport and Belfast International Airport
- Unlike other major UK cities, Belfast is only accessible by either air or sea – with the majority of passengers coming by air. Consideration needs to be given to ensuring that these modes of travel are not subject to policy change which could have disproportionate cost implications – and thereby impact on usage levels
- Direct air route access is critical to the success of any destination and whilst Dublin Airport is an important access point onto the Island of Ireland with direct access from over 170 destinations, it will be important to further develop direct access into Northern Ireland's airports
- The Council and Tourism NI have recently invested in a major conference and exhibition centre (ICC Belfast), at a cost of almost £30million (drawing in EU match

funding). The success of this investment is predicated on maintaining air route access to the city for national and international conference delegates

- Road and rail links in Belfast and the surrounding areas have been strengthened in recent years. This is important in helping tourists to access areas outside of Belfast if they wish. There are still gaps in the rail infrastructure to the two Belfast airports. This means that there is a disproportionate reliance on car travel to both airports.
- The introduction of the Glider service in Belfast helps visitors to move across the city in a way that they have not been able to do previously. The uptake by tourists has been significant and this is having a positive effect on enhancing the impact of tourism across the city and into communities
- The tourism and infrastructure investments in the Belfast City Region Deal will act as a catalyst for enhanced regional connectivity between Belfast and other key tourism destinations
- Belfast as a cruise destination has gone from strength to strength with recent commitment to investing in upgraded cruise facilities at Belfast Harbour.

The promotion of Northern Ireland as a destination

- The promotion of Belfast City and region is currently led by Visit Belfast, working in close collaboration with Tourism NI (for marketing in NI and RoI) and Tourism Ireland (for campaign activity beyond the island of Ireland)
- The Council recognises and supports a collaborative, multi-agency approach to promoting the city and region
- The Council is in the process of developing a new cultural strategy. As part of that work, we have developed a new tourism narrative and will be working with our marketing partners to ensure that the unique and authentic Belfast narrative is carried as part of the wider partner campaigns and activities in the various markets
- Tourism growth figures from international visitors indicate that Tourism Ireland is having significant success in delivering new visitors to the island of Ireland. It is critical for all partners in the destinations to work together to ensure that the quality of the product is enhanced in order to attract those visitors and to ensure that they have a positive experience of their time in the destination. This underlines the need for collective action.

Financial & Resource Implications

3.4

There are no specific costs associated with provision of this response.

	<u>Equality or Good Relations Implications/Rural Needs Assessment</u>
3.5	None.
4.0	Appendices – Documents Attached
	None