



Subject:	Update on Tourism
Date:	3 March 2021
Reporting Officer:	John Greer, Director of Economic Development
Contact Officer:	Eimear Henry, Senior Manager, Culture and Tourism

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 checked="" type="checkbox"/> No <input type="checkbox"/>

1.0	Purpose of Report or Summary of main Issues
1.1	The purpose of this report is to provide Members with an update on the development of a new tourism plan and set out key actions for quarter 1 of the 2021/22 financial year.
2.0	Recommendations
2.1	The Committee is asked to: <ul style="list-style-type: none">- Note the contents of the report and progress made to date on the development of the new tourism plan with agreement to receive a full draft in June 2021.- Agree to progress the key actions as set out in appendix 1 and supported by 2021/22 departmental budget for tourism development.
3.0	Main report
3.1	Members will be aware that at a meeting of the City Growth and Regeneration Committee in August 2020, it was agreed that a new ten-year plan for tourism was to be developed. The purpose of this plan is to:

- Deliver on the tourism priorities set out the *Belfast Agenda*, recognising the importance of tourism to *Growing the Economy* and *City Development*.
- Align to the ten-year cultural strategy *A City Imagining*, in order to ensure that tourism development supports cultural development and is based on an authentic and sustainable Belfast offer.
- Support economic and social recovery in the context of Covid-19 including stabilisation, recovery and growth with the opportunity to build back better.
- Provide strategic context to the Belfast City Region Deal.

3.2 A further update was provided to Committee in December 2020 setting out findings of the initial research and development phase and the emerging four draft strategic themes:

- Grow Belfast
- Experience Belfast
- Position Belfast
- Sustainable Belfast

3.3 An initial timeframe had aimed to present a full draft plan to Committee in March 2021. However due to ongoing challenges facing the tourism and hospitality sectors it is proposed that this is now extended to June in order to facilitate sectoral engagement and to better understand the recovery trajectory. This report therefore provides an update on further progress made during the development phase of the plan and sets out key foundation actions to be taken forward in quarter one of the 2021/22 financial year.

3.4 **Experience Belfast – developing neighbourhoods**

The cultural strategy recognises the importance of cultural tourism and the role of Council in supporting the development of local destinations and quality products across the city. In particular the strategy commits to:

- Developing cultural tourism through building capacity and opportunity for citizen and culture led approaches to tourism development and infrastructure (e.g. local tourism programme).

3.5 This will be further expanded in the ten year tourism plan through one of the four draft themes, Experience Belfast. This will include experiences that can be brought to life through the development of an optimal mix of ‘anchor’ and ancillary products that get people into an area and keep them there. This also increases connectivity between all parts of the city raising the visibility and appeal of the breadth of the tourism offer with a focus on encouraging international visitors to immerse themselves actively in the locale, interacting with people and learning the history and stories of the places.

3.6	<p>Further work will be undertaken to embed neighbourhood tourism into the overall experience plan with proposals for a competitive funding scheme to be developed in line with the investment approach to the cultural sector. Details will be included in future Committee reports for consideration from 2022/23 onwards. However to ensure continuity and to build on local tourism development provided to date it is proposed to provide interim support for key programmes such as the City Connections local tourism programme and other ongoing partnership agreements. In 2020/21 these local conduits have continued to deliver support programmes throughout COVID-19 including:</p> <ul style="list-style-type: none"> - Insights and research into impact of the pandemic on tourism businesses at a localised level. - Public events and activities – adapting to restrictions including hybrid models of digital content and on the ground activity during summer months when permitted. - Developing linkages between heritage programmes and community tourism. - Connecting local regeneration to tourism development.
3.7	<p>It is proposed that these ongoing partnerships can be utilised to ensure that recovery plans are pivoted to consider local needs and opportunities with the focus of activity for 2021-22 to include:</p> <ul style="list-style-type: none"> – Increase engagement and promote the benefits of participating in local networks including identifying new and emerging partners delivering local tourism experiences. – Investing in local programmes that engage directly with visitors including support to attract target markets during phase one of recovery such as domestic staycations as well as UK and Ireland. – Capacity building and development work on clustering approaches with involvement of industry experts and practitioners to develop geographic and thematic models. – Supporting and commissioning robust evidence base to increase understanding of the market including consumer testing of local products. <p>Programme Development supported by the Global Destination Sustainability Index</p>
3.8	<p>Members will be aware that Belfast has completed its year one benchmarking as a member of the Global Destination Sustainability Index (GDSI). The Index is based on 69 Indicators broken down into four categories:</p> <ul style="list-style-type: none"> - Environmental Performance - Social Performance - Supplier Performance - Destination Management Performance

3.9	<p>As previously reported to Committee in December 2020, a series of recommendations for action have been identified for Belfast to take forward to increase our ranking position in the Index in advance of the benchmarking review which is due for submission in August 2021. A number of these specifically relate to the Destination Management Organisation and will be taken forward as part of Visit Belfast's business plan for 2021-22. In addition to this, under Council's contract with the GDSI, they have been engaging with the ICC (as the City's Congress venue) to identify a suitable 3rd party accreditation scheme, likely to be the globally recognized Earthcheck scheme.</p>
3.10	<p><u>Environmental research</u></p> <p>Belfast's Resilience Strategy with its alignment to UN Sustainability targets was commended by the GDSI as exemplary. It was noted that although great progress has been made in terms of recycling over recent years, overall Northern Ireland has a relatively high landfill rate and export of waste remains high. Officers wish to understand the overall contribution of the tourism industry to this process in greater detail in order to make informed decisions on future plans. It is proposed that a piece of research is carried out to establish baselines and future areas of action specifically in relation to landfill and the export of waste.</p>
3.11	<p><u>Social and cultural initiatives</u></p> <p>In 2020 Belfast City Council partnered with QUB to host a student placement from QUB's MSc Leadership for Sustainable Development programme to analyse sustainable practices currently used by festival and event organisers in Belfast, highlight best practice and identify areas for improvement. Officers facilitated engagement with events and festivals through BCC's Festivals Forum. The output of this project was a Sustainable Events Toolkit aligned to the UN Sustainable Development Goals. It is hoped that once events and festivals re-open that this toolkit can be mobilised to enable both Council and our partners in the cultural sector to assess their accountability in the context of sustainability and begin to adapt.</p>
3.12	<p>This year, our delivery partner Visit Belfast are hosting a further student placement to develop a Sustainable Events Framework. Due to complete in April 2021, this project will map the current sustainable initiatives which are underway in Belfast and identify best practice in terms of sustainable destinations globally. The outcome of this project will be the creation of a Sustainable Events Framework which will be used to assist Visit Belfast, Council and clients to connect to, produce and promote events and cultural activities which have sustainable environmental, community, social and economic impacts.</p>

3.13	<p>Working from this framework, we will identify and curate ‘Green Stories’ for businesses in the Belfast City Council area for promotion in a range of media to inspire, motivate and further incentivise engagement.</p>
3.14	<p><u>Supporting Suppliers</u></p> <p>The GDSI benchmarking exercise identified a number of gaps in relation to the city’s supply chain. Officers have been working in partnership with the GDSI, Visit Belfast and the Resilience Team to progress a third party accreditation strategy for the hospitality industry and events and festivals sector. This will involve a strategic partnership with Green Tourism and a scheme to incentivise 3rd party accreditation across the Visit Belfast partnership and Council client portfolio.</p>
3.15	<p>In addition to the accreditation strategy, officers have identified a lack of capacity building initiatives and programmes which assist and encourage the industry to commit to sustainability in the long-term. A number of initiatives will be developed to address this gap:</p> <ul style="list-style-type: none"> - Officers will establish a pilot scheme for the hospitality industry encouraging the reduction of food waste (aligning with the UN sustainability target of reducing food waste by 2030). Previous successful pilot schemes in other cities have involved initiatives such as training kitchen staff in food reduction techniques which also bring financial benefits to the business. - Officers will work in partnership with key stakeholders to enhance reduce, reuse and recycling initiatives both internally (across our own tourism assets) and externally across the tourism and hospitality industries and related sectors. - Early discussions have taken place with the Resilience team and other Council Departments to look at the potential for co-designed schemes with a specific focus on sustainable food. - Officers are discussing the potential for a Belfast showcase at the 26th UN Climate Change Conference (COP26) which will take place in November 2021 in Glasgow.
3.16	<p>Creating new digital content to support the positioning of Belfast</p> <p>As part of the development of the new tourism plan and in support of the concept development for the Belfast Destination Hub, research has been commissioned to:</p> <ul style="list-style-type: none"> - Better understand consumer attitudes and motivations to visiting Belfast - Establish a baseline for perceptions of the city as a cultural tourism destination - Receive feedback on the proposed cultural tourism narrative and themes included in the cultural strategy. - Test the Belfast Stories concept and the wider product in the Belfast Destination Hub

3.17	<p>The final report identified an opportunity to strengthen and broaden the emotional connection of the market to Belfast beyond those that are seeking a niche experience. The key recommendation coming out of this research is the role that Council can play in transforming perceptions of Belfast by enabling the creation of much richer and diverse digital content that represents the breadth of the city’s tourism experience and authentic Belfast offer.</p>
3.18	<p><u>Summary of feedback</u></p> <ul style="list-style-type: none"> - Unless people had some prior connection, the majority of participants did not know enough about Belfast to include it in their sub-list of choices for a city break destination. In particular there were limited emotional connotations required to make it a destination of choice. - Some of participants were aware of Belfast marketing –most notably those from ROI – however this is not necessarily their preferred format for influencing where to go. Formal marketing is considered insufficient of itself to prompt action. Searching digital content does not provide the necessary supplementary information to set Belfast apart in a competitive marketplace or to challenge established perceptions of the city. Setting this in context against digital content of other cities such as Edinburgh, Galway, or further afield but of similar population size to Belfast, Arhus (Denmark), or Varna (Bulgaria) presents a difficult first hurdle for potential tourists to overcome. - In the absence of strong positive digital content, potential tourists must rely on formal communications, opinions of others and prior knowledge. This leaves Belfast open to generalisation. - Internationally, people see Belfast as a potential destination, but not quite yet and this is in part based on a lack of curated digital content. -
3.19	<p>COVID-19 has amplified the importance of digital spaces. At the appropriate time consumers will return to making decisions of future destinations of preference. It is important that Belfast develops a digital strategy that can spark and sustain global dialogue about the city to create the connections that ultimately will move from a digital space to experiencing the place through city breaks. In turn the production of digital content supports of the positioning of the city internationally in all sectors including investment, events and education.</p>

3.20	<p><u>Financial & Resource Implications</u></p> <p>The activities outlined in this report will be resourced from the 2021/22 budget for the Culture and Tourism section of the Economic Development division of the Place and Economy Departmental budget.</p>										
3.21	<p>All programmes will be subject to ongoing review with cost savings identified where projects cannot proceed due to Covid-19. The breakdown is detailed below with further detail provided at appendix 1.</p>										
	<table border="1"> <tr> <td data-bbox="274 658 1043 703">GDSI Membership</td> <td data-bbox="1043 658 1481 703">£7,500</td> </tr> <tr> <td data-bbox="274 703 1043 748">Capacity building including Green Tourism accreditation</td> <td data-bbox="1043 703 1481 748">£75,000</td> </tr> <tr> <td data-bbox="274 748 1043 792">Research and development</td> <td data-bbox="1043 748 1481 792">£10,000</td> </tr> <tr> <td data-bbox="274 792 1043 837">Local tourism support</td> <td data-bbox="1043 792 1481 837">£200,000</td> </tr> <tr> <td data-bbox="274 837 1043 913">Digital content</td> <td data-bbox="1043 837 1481 913">£60,000</td> </tr> </table>	GDSI Membership	£7,500	Capacity building including Green Tourism accreditation	£75,000	Research and development	£10,000	Local tourism support	£200,000	Digital content	£60,000
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3.22	<p><u>Equality or Good Relations Implications/Rural Needs Assessment</u></p> <p>The cultural strategy, <i>A City Imagining</i> has been subject to an Equality Impact Assessment (EQIA) and a Rural Needs Assessment (RNA). The ten year tourism plan will include a further equality screening.</p>										
4.0	Appendices – Documents Attached										
	Appendix 1: Tourism Actions for 2021/22										

APPENDIX 1: 2021-22 Tourism Actions

The proposed programme supports initial quarter one actions against the priorities set out in the ten year cultural strategy as well as foundation actions for the emerging ten year tourism plan.

Project Name	Project Description	Actions/ Targets	Timeline	Budget
Sustainable tourism				
Global Destination Sustainability Index	Belfast completed index benchmarking in 2020. This is due to be repeated in 2021 with the results published as part of the index Global Destination Sustainability Index.	Forward Planning for Climate Change: Update to Index including Environmental Impact Audit and Action Plan. Ongoing support to Council and partners including Visit Belfast and ICC.	April 2021 – March 2022	£7,500
Research and development	Commissioning of relevant research to better understand index scores, challenges and impacts including developing key actions for improvement.	Impact of tourism research report.	April 2021 – August 2021	£10,000
Green Tourism Accreditation	The programme will provide access to the GreenCheck tool, completing individual assessments for tourism businesses including accommodation, hospitality, events and attractions. Cultural organisations will also access the programme.	Up to 300 businesses supported.	April 2021 – March 2022	£60,000
Capacity building	Working with the supply chain to incentivise change programmes, raise awareness and pilot projects e.g. food waste.	Pilot programme completed. Green Stories curated.	April 2021 – March 2022	£15,000

Experience Belfast – local and neighbourhood tourism				
Lagan Canal Trust	Ongoing annual support for Lagan Canal Trust in partnership with other local authorities to support annual programme of work.	Annual funding agreement with specific targets to be developed.	April 2021 – March 2022	£17,000
City Connections	Ongoing partnership model between Fáilte Feirste and Eastside Partnership to deliver a programme of work that supports development of local tourism products and citywide connections.	Complete market research. Support for local businesses through joint initiatives. Support for delivery partners with targets to be developed as part of funding agreement.	April 2021 – March 2022	£100,000
Capacity building	Roll out of local tourism development across other geographic areas in the city and to include communities of interest.	Developing phased approach and identification of new partners. Capacity building and support programme delivered.	April 2021 – March 2022	£83,000
Positioning Belfast				
Digital content development	Working with local partners to showcase Belfast's authentic cultural tourism offer through the commissioning of new online content.	- Digital showcase - Video and photography - Webinars Sharing of content with key partners to embed cultural vibrancy messaging into tourism, investment and education positioning.	April 2021 – September 2021	£60,000