



Report to: Shadow Strategic Policy and Resources Committee

Subject: Draft Belfast Integrated Tourism Strategy 2015-2020

Date: 28 November 2014

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1	Relevant Background Information
1.1	In September 2013, the Development Committee gave approval for the development of a new tourism strategy for Belfast. The strategy was commissioned by the Council in partnership with the Northern Ireland Tourist Board (NITB) and has been developed through extensive consultation with partners and stakeholders.
1.2	Tourism is the largest and fastest growing industry in the world today accounting for 9% of global GDP and employing 8% of the working population. In 2013 the visitor economy of Belfast was valued at £438.4m generated by approximately 9.4m visitors. On some nights during peak tourism periods there can be in excess of 4,000 temporary overnight residents in the city centre. This expenditure supports over 9,300 jobs across the city.
1.3	Tourism can also help to promote a positive image of the city, support local businesses, stimulate civic pride and help to sustain services, events and facilities that are highly valued by the local community.
1.4	The Belfast Integrated Tourism Strategy sets out the main priorities and major activities for the city to improve tourism over the next five years. The aim of the strategy is to double tourism numbers, spend and jobs by the year 2020.
1.5	The vision of the strategy is to “Build prosperity for our community by becoming a world leader in innovative, dynamic tourism development and marketing supported by an unrivalled desire to give all our guests unique Belfast experiences.”

1.6	It is very much a strategy for the city and will help focus everyone's efforts around the priority issues. The improvements that it suggests will be delivered in partnership with all those organisations that have an interest in increasing tourism into the city.
1.7	<p>The main improvement areas in the strategy are:</p> <ul style="list-style-type: none"> – Enhancing the city's reputation by better marketing, increasing access to the city, improving the services for visitors, and improving our events and festivals offer. – Strengthening the sector through quality assurance, training and developing new products and experiences for tourists.

2	Key Issues
2.1	<p>The international consultancy firm (Stevens and Associates) commissioned to develop the strategy has undertaken extensive consultation with approximately 120 tourism sector stakeholders as well as 70 people through workshop discussions. This was in addition to thorough desk based research, business surveys and a benchmarking exercise against other European destinations. Initial ideas were discussed with city stakeholders at the Future City Conference in June 2014.</p>
2.2	<p>The strategy contains one overarching strategic goal, namely to double the value of tourism by 2020. This will result in tourism being worth £870m per annum in five years, based upon current metrics. The strategy has taken into consideration the wider context, including alignment with the city centre regeneration strategy and investment plan. This identified the need to grow the tourism industry in the city and to invest in additional infrastructure to attract visitors to the city and to ensure that they could increase their levels of spend on facilities and activities through new product development and infrastructure investment.</p>
2.3	<p>The strategy contains a number of innovations and strategic priorities for action. These include:</p> <ul style="list-style-type: none"> – Development of an 'Ideas Factory' and innovative solutions: this initiative will empower the innovators in the private sector, delivering upon the 'experiential tourism' agenda. This is a fundamental part of the tourism strategy, as Belfast has a young and innovative creative sector who, if enabled, can develop solutions providing international standout – Supporting "a city of urban adventure": there are clearly opportunities to develop innovative solutions to deliver the urban experiences desired by the younger markets – Exploring the "Beyond Peace" agenda: Belfast is recognised worldwide as a city region that has emerged from conflict. The world wants to learn from these experiences and this can be a fundamental part of the business tourism strategy and a significant income generator – Developing a focused approach to business tourism: the investment in the new Waterfront development has the potential to significantly increase the volume of business tourism. This will have a positive impact

	<p>on the wider sector in the city and will grow the number of bed nights, particularly mid-week</p> <ul style="list-style-type: none"> – Potential to explore the ‘giving city’ concept: Belfast could become the first city in the world whose tourism industry (businesses and visitors) collaborate in a unique, collective social responsibility initiative to raise money to invest in community peace-related projects at home and around the world – using tourism to position Belfast as ‘the giving city’. This concept will require further development but may offer a unique selling point, in a time when there is a growing interest in ethical tourism – Focus on youth and younger markets: research demonstrates the importance of this market for Belfast. There is a need to build on this and to marketing and product development initiatives should prioritise these segments reflecting the overall city narrative.
2.4	<p>These priority actions will be delivered through a number of actions plans involving partners from the public and private sectors. The strategy recognises that the current delivery structures within the city are fragmented and won't deliver optimal returns as currently aligned. It suggests very clear roles and responsibilities for the various agencies and identifies the need for the council to be the key partner in bringing together the input from the public sector. At the same time, it points to the need for the council to lead by example – ensuring that its policies and strategies fully support the development of tourism in the city.</p>
2.5	<p>The strategy identifies the need to look at how public funding is channelled into Visit Belfast (VB) and recommends that this is done through a multi-annual MoU is which broad areas of activity area agreed and VB is then allowed to go ahead with the operational delivery of agreed activities, within agreed parameters. This will require further engagement between NITB, Belfast City Council and Visit Belfast.</p>
2.6	<p>Subject to council approval the strategy will be issued for consultation for a period of 12 weeks from January 2015. The consultation will run in parallel with the consultation exercise on the City Centre Regeneration Strategy. A narrative is being prepared to inform interested parties how both documents links together and to ensure synergies between both. Following the consultation exercise, the strategy will be brought back to council for final agreement.</p>

3	Resource Implications
3.1	<p>No specific resource allocations set out within the strategy. Work will now be undertaken to look at the financial implications of the proposed activities, taking account of potential public and private funding for this work.</p>

4	Equality and Good Relations Considerations
4.1	<p>A full Equality Impact Assessment will be carried out in parallel with the consultation exercise.</p>

5	Recommendations
	<p>Members are asked to:</p> <ul style="list-style-type: none"> – Note and agree the content of the draft Tourism Strategy as a basis for public consultation – Agree to consider the revised version of the strategy after the conclusion of the consultation exercise.

6	Decision Tracking
	<p>Timeline: A report will be brought back to the April 2015 Committee meeting.</p> <p>Reporting Officer: John McGrillen.</p>

7	Key to Abbreviations
	<p>NITB – Northern Ireland Tourist Board VB – Visit Belfast</p>

8	Documents Attached
	Appendix 1: Belfast Integrated Tourism Strategy 2015-2020