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**BELFAST INTEGRATED TOURISM
STRATEGY 2015-2020**

Commissioned by Belfast City Council and the Northern
Ireland Tourist Board

Version 21 November 2014

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SECTION 1: SETTING THE SCENE

1.1 Introduction

This is the draft Integrated Tourism Strategy for Belfast for 2015 – 2020.

This strategy has been jointly commissioned by Belfast City Council (BCC) and the Northern Ireland Tourist Board (NITB). Representatives from both organisations, together with representatives from the Department for Enterprise, Trade and Investment (DETI), Visit Belfast (VB) and Tourism Ireland (TI) formed the steering group to oversee the progress of the strategy.

The aim of this strategy is to achieve the ambition and aspiration to make Belfast a world class, must visit, city destination. It is about enhancing the city's reputation; it is about place-making, development and promotion; it is about tourism and economic development, job and wealth creation and developing skills and talent to meet the needs of a modern tourism industry.

Stevens & Associates (S&A) were appointed to undertake this study. For this contract S&A brought together an international team of consultants from Ireland, Scotland, Denmark, Austria and The Basque Region.

The strategy is the follow up to 'Belfast Tourism Gateway to the future' strategy which expired in 2014.

1.2 The scope of the report

Over the past six months an extensive consultation process has been undertaken. This has included face to face interviews with over 120 stakeholders involved in the Belfast tourism industry as well as another 70 people through workshop settings. Extensive desk research and business surveys have also been undertaken to arrive at the recommendations contained in this report.

1.3 The global importance of tourism

According to the World Bank (WB), The UN World Tourism Organisation (UNWTO) and The World Travel and Tourism Council (WTTC), tourism is the largest and fastest growing industry in the world today accounting for 9% of global GDP, employing 8% of the working population, accounting for over 1bn international arrivals around the world in 2013.

The prospects for continued global growth in terms of international tourism arrivals are extremely positive over the next 10 years. The UNWTO is predicting that international tourism arrivals will increase to 1.6bn by 2020.

Over the past five years The European Travel Commission (ETC) has consistently reported growth of between 3% - 4% per annum across the EU28 countries and its latest *“Trends and Prospects”* report maintains this optimism over the medium to long term.¹

Tourism is a positive force for promoting positive images of the city, of supporting local businesses, of stimulating civic pride and helping to sustain services, events and facilities that are highly valued by the local community (arts centres, museums, transport services, restaurants, bars and markets).

To benefit from this growth opportunity, NITB has adopted an experience-based approach to tourism development and marketing. This approach will give NI a competitive advantage and create opportunities to drive increased revenue in tourism.

1.4 The right time for a fresh approach

As a result of successfully developing tourism over the past 10 years, Belfast is now well placed to take full advantage of predicted future growth in international tourism and the key trends driving this growth.

The city has performed well in recent years but there is still some way to go in comparison to its competitor, benchmark cities in Europe.

¹ “European Tourism 2013 and 2014: Trends and Prospects”, 2014, ETC.

Tourism consumer demand is fast moving, extremely volatile and tourists are becoming ever more discerning and spoilt for choice. For a city to achieve stand out in a competitive market place is becoming extremely challenging.

There are in excess of 130 city-break destinations in Europe – all of whom are chasing similar customer markets to Belfast. In addition, the UN World Tourism Organisation estimates that there are some 3,000 competently organised tourism destinations across Europe all wanting to attract the attention of leisure and business tourists.

The hard work, energy and investments that have taken place must now be leveraged to take full advantage of the opportunities ahead. This strategy sets how this can be achieved.

However there are issues that bring a competitive disadvantage to Belfast, which have to be addressed. They include air accessibility, visa and VAT matters, and the sporadic outbreaks of civil unrest together with ongoing residual issues such as licensing laws and opening hours. Unless these are tackled they will continue to prevent the city achieving its full tourism potential.

There has to be a new growth trajectory fuelled by:

- Strong leadership
- Ambition
- Tourism growth driven by innovation, fresh ideas and more efficient ways of working
- Internationalisation.

These are four of the core components contained in this strategy. They exist to ensure Belfast's future competitiveness as a destination of choice for leisure and business tourists.

1.5 The rise of city tourism

Within this context, the UN World Tourism Organisation (UNWTO), the City Mayors.com, European Cities Marketing (ECM) and Tourism Intelligence International (TII) are all highlighting the fact that over the next twenty years it will be **city tourism** that will drive tourism growth.

“Cities will continue to lead the formidable European tourism industry as a result of their greater capacity of beds and demand (bednights) increasing at rates higher than elsewhere being driven by international tourist demand².”

The UNWTO’s latest report on *“City Tourism”* (2012), and the recently published TII report *“Cities on the Rise”* (2014), identifies a number of new drivers of demand fuelling this growth in city tourism. They include:

- The renaissance of the city
- The dominance of young markets and those ‘young at heart’
- The importance of business tourism (Meetings and Incentive Travel Markets)
- New enlightenment – moving beyond experiences
- World citizenship(sustainability, responsibility and diplomacy)
- The rise of new forms of urban sports tourism
- The importance of signature festivals and events
- The need for local narratives
- Innovation and creativity to deliver hybrid products and services.

In addition to responding to these market trends, the tourism strategy for Belfast must sit comfortably within the wider context of international, European, national, regional and local policies and organisational developments.

1.6 Belfast’s character and its core values

Belfast is an important European city. It is the pre-eminent industrialised city on the island of Ireland. It is a city whose story continues to shape and influence many aspects of the way the world thinks and acts. It is a city with an illustrious past and a future where the best is yet to come.

² “The European Cities Marketing Benchmarking Report – 9th Edition”, 2013, MODUL University Vienna for ECM.

Belfast is a city with a young, well educated and skilled population. Almost 19% of its resident population is under 15 years of age and the average age of its citizens is 36.6 years. There are some 73,000 full and part-time higher education students studying in the city.

Belfast is unquestionably a maritime city. In the 17th century Belfast grew rapidly and successfully as a port. It continued to grow in size and status throughout the 18th century based upon trade, the development of sea-routes and the 'facilitation' of industry. Belfast took raw materials from elsewhere and converted them into products creating high added value.

The 19th century witnessed the development of its linen industry, earning Belfast the reputation of being '*Linenopolis*'. This success was based upon innovation and invention in financial models and exchange of ideas as much as it was about the invention of production techniques.

It was soon to become a manufacturing powerhouse; a centre of global significance in linen, shipbuilding and rope making. A city whose prosperity, pride and international status was reflected in its great architectural statements and its financial, philanthropic, cultural and social institutions.

At the turn of the twentieth century Belfast was a small town but had the physical and psychological characteristics of an ambitious, confident, much larger maritime city. This is a characteristic that prevails today and needs to be further nurtured.

The strength of the Belfast renowned '*welcome*' is because this was always a city of in-migration – of people, ideas, inventions and cultures. It was a community whose own cultures were influenced by direct contact with the diversity of people that were to be found on board the ships that traded in the city's harbour. This gave the people of Belfast genuine stories and exotic tales to be told. The inherent art of story-telling and song writing was taken to new levels.

Today this is a city at the heart of a greater metropolitan area with considerable ambition. It is emerging from a legacy of conflict and is rapidly being transformed into a modern, medium sized, city with an increasingly attractive quality of life.

The impending changes to the structure of local government boundaries in Northern Ireland will significantly increase the geographical extent and impact on the demographic composition of the city.

This will now become a singly governed city region with a growing youthful population, a re-invigorated city centre, a thriving diversified business and investment environment with burgeoning universities and colleges... and, of course, the growing importance of welcoming tourists to the city. These are all factors contributing to the positive re-imagining and enhanced reputation of the city around the world.

“Belfast was always a great place to come from. Following an energetic and sensitive regeneration, it’s a great place to go. But it is not the shining –glass towers fronting the River Lagan, nor the sudden availability of ciabatta, that have transformed Belfast... it’s the shift in the mindset, a determination to have a good time.... and it’s the spirit of the people that most delights visitors to Belfast.” E. Jane Dickson, Conde Nast, Traveller, May 2014

SECTION 2: THE CURRENT SCENARIO IN BELFAST

2.1 The value of tourism to the Belfast economy

Tourism is a major contributor to economic development in Northern Ireland and particularly in Belfast. It is an industry that brings many tangible and intangible benefits to the community at large, notably in terms of visitor spending, jobs and investment.

In 2013 the visitor economy of Belfast was valued at £438.4m. This was made up of £230m from 7.64m day visitors and £2.08.4m from 1.99m tourists who stayed for at least one night in the city. This expenditure supports over 9,300 FTE jobs across the city.

When the 3.91m bednights are added to the 7.46m day visitors, it is clear that Belfast hosts a total of 9.4m individual visitors and a total of 11.4m visitor days in the city – approximately 1 resident to every 40 visitors and on some nights during peak tourism periods there can be in excess of 4,000 temporary overnight residents in the city centre. In 2013 Belfast accounted for 50% of all overnight tourist trips and 60% of all tourist expenditure³ in NI.

Belfast has in recent years received many accolades, including:

- Nomination as one of the world's top destinations for 2012 by *National Geographic Traveller* magazine which called the city a 'treasure' with an '*incredible atmosphere*'
- Nomination of Queen's University as the top UK University for Medical Science and Pharmacy in the Sunday Times University Guide 2013
- INSTAGRAM recognised Belfast as the UK's '*Happiest City*' in 2014
- In 2012 the Financial Times listed Belfast as one of the '*Top 10 places in the world*' to hold a conference or major event
- Trip Advisor chose Belfast as the best value city break in 2012.

³ Source: NISRA, NITB, TIL, and BCC 2014.

2.2 Tourism in Northern Ireland – the current situation

Tourism in Northern Ireland involves many different organisations. In the public sector there are seven Government Departments with an interest in tourism: DETI, DARD, DCAL, DOE, DSD, DRD AND DEL. In addition from April 2015, there will be 11 new councils each with greater responsibility for economic development. Tourism will form an important aspect of this new general power of competence.

In 2009/10 DETI undertook an extensive consultation into the future of tourism in NI. This resulted in a number of targets to grow tourism's contribution to the NI economy. These are included in the 'Programme for Government' namely: *"to increase visitor numbers to 4.2m and tourist revenue to £676m by December 2014"*. The Department's targets for 2020 include 4.5m visitors and earnings of £1bn.

In terms of Northern Ireland's performance against *'The Programme for Government Targets'* the recently published figures by NISRA, shows that full year figures for 2013 shows *"a 2% decline in domestic trips over 2012 figures and a worrying 7% decline in overnight tourists from the ROI."*⁴

The current absence of a NI tourism strategy has been a cause of concern for many stakeholders. In the words of the DETI Review of NITB and Tourism Structures, *"the absence of a strategy has inhibited the development of those collaborative partnerships across the industry, in government and beyond, which are the building blocks for future progress. It has also caused a degree of confusion over the respective roles of the Department and the NITB"....* and, indeed, beyond.

Further to a greater understanding of NI's best prospect visitors and best practice insights NITB has adopted the concept of **experiential tourism**. By focusing on NI's strengths and natural assets the aim is to create authentic experiences and unlock stories. This approach will require the tourism industry to work much more closely together to offer an end to end holistic experience the meets the needs of each visitor segment. Five core experience themes that resonate and appeal to NI's best prospect visitors have been identified. These have the potential to give NI a competitive advantage. The themes include:

- Culture and Creative Vibe
- Unique Outdoors
- Living Legends
- Coasts and Lakes.

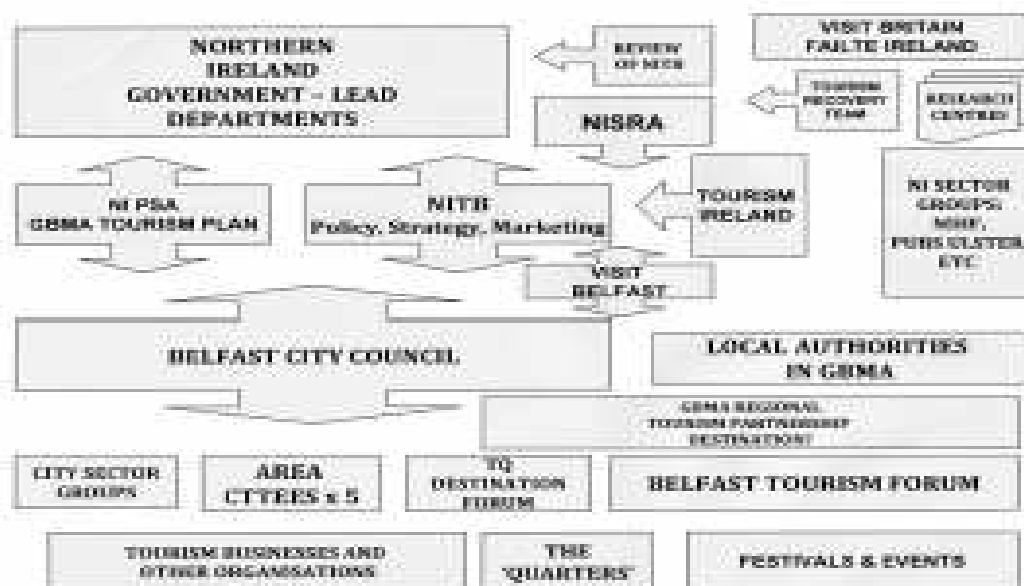
⁴ DETI Review of NITB and Tourism Structures, June, 2014.

The final theme, *Uniquely NI*, underpins the four distinctive themes by adding an authentic dimension. The experiential themes are anchored in the nine destinations across NI. In keeping with Belfast's key strengths, NITB has identified that Belfast aligns most closely with Culture & Creative Vibe and Living Legends themes.

2.3 The organisational structure of tourism in the city

The current tourism organisational 'map' of Belfast is very crowded with many different levels of representation (Figure 1). This structure has evolved over the past 20 years.

Figure 1: Current organisational structure of tourism in Belfast



At a strategic level there are many organisations with an interest in tourism. This is causing a degree of confusion within the industry and there have been calls for greater clarity and streamlining.

In terms of developing tourism in Belfast, the four principal organisations are:

- Belfast City Council
- NITB
- Tourism Ireland
- Visit Belfast.

The 'Quarters' as developed in the 'Belfast Tourism Gateway to the future' strategy have performed an important role in creating identities for areas across the city. Belfast has also a large number of groups developing tourism within various parts of the city. These efforts are important but must be encouraged to align with the overall priorities contained within this strategy in order to ensure they are mutually self-supporting.

2.4 Evaluating Belfast's tourism performance

The Hudson Stevens model developed by S&A with the University of Calgary evaluates a destination's performance against 54 variables. The model is then able to allocate an overall destination score made up of the individual scores given for each of 33 different aspects of a destination's tourism industry.

This model has now been applied in over 60 destinations around the world. Top performing destinations achieve overall scores of 150-180 with a possible maximum score of 198.

Over the past six months this has involved stakeholders from across the city in completing this survey. The overall scores (combining all of the responses) were:

GREATER BELFAST	= 115.1
BELFAST CITY	= 120.9

The survey identifies common areas of 'weakness', and hence opportunities for improvement, for both of the areas covered. These include:

- The need for a shared philosophy and vision for tourism
- The need for an agreed development plan
- The need to become more competitive
- Improved stewardship of the city's assets (hardware and software)
- Clearer organisational structures and clarity of roles and responsibilities
- Improved visitor management
- Stimulating enterprise and supporting businesses

In terms of agreed 'strengths', the model reveals that these are:

- Location and setting; cost and value; quality of service and hospitality
- Culture and heritage; activities and events
- Entertainment and dining.

2.5 SWOT Analysis of tourism in Belfast

In framing the strategy it is important to explore the strengths, weaknesses, opportunities and threats in the Belfast offer.

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Youthful city - Ambitious and adventurous entrepreneurs - Titanic Belfast and Titanic Quarter - Compact City Centre - City quarters - Creative energy – moving image industry, music and dance - Friendly and welcoming - Gateway role for NI and Ireland - Scientific and medical excellence - Conference facilities - Curiosity factor - Underground cultural vibe - Healthy day visitor market - ROI and domestic markets have been growing rapidly - Temperate climate and good time zone for core markets - BCC taking charge of change - Outward and increasingly international - Good Universities and colleges - Good sea links with GB ports and beyond - Two airports with over 90 direct access flights to other GB and European cities – population of 55m within 60 mins drive of airport in GB with existing direct flight - Proximity of Dublin Airport for international connections - Hotels performing strongly - +77% occupancy - Capital Investments over recent years in City's tourism infrastructure 	<ul style="list-style-type: none"> - Lack of coherent brand and identity - Lack of packaged experiences - Lack of a contemporary art gallery - Connectivity between key points of interest in city - Access; cost for key markets - Fragmented and disjointed organisational structure - Outdated perceptions of the offer - Product deficit in terms of urban sports - Skills and labour shortages and leadership and operational level - Emerging leadership deficit - Shorter than average overnight trip length and spend per night - Need to grow capacity of hotel beds - Lack of 'What's On' information in core markets - Lack of robust and accurate market data - Sunday and Evening Economy offer - Lack of appropriate skills - Quality of visitor experience does not match expectations or that of leading competitors - Lack of focus on strategic priorities

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> – Greater collaboration in marketing and use of resources – Improvements in sports stadia for sports/cultural performance – Investment in Belfast Waterfront Hall – Harnessing community, creativity and social enterprise – Developing association with Belfast genius through famous personalities e.g. C.S. Lewis, Van Morrison, George Best, Alex Higgins, Seamus Heaney. – A more coherent/engaging Belfast story – Extending average length of stay – Attracting more cruise ships – Teaching English as a Foreign language – Targeting the markets in those cities with direct air and sea access – Improving communications between government and industry stakeholders – Developing River Lagan as green artery and the Harbour and Lough and Belfast Hills for recreation – Events/Festivals programme to reflect brand identity – New planned hotel developments (4/5 star + budget) and other unique forms of accommodation – Using social media to engage in conversations about Belfast – Encouraging more music performance in city venues to improve reputation as a lively, fun place to be – Sustaining a positive and coherent PR strategy – Developing product packages for city and wider destination – Aggressive business tourism development – Injecting a stronger innovative and creative approach – Maritime Heritage 	<ul style="list-style-type: none"> – Reduction in air/sea capacity – GB market showing limited recovery – Entrenched aspects of sectarianism constraining integration and cultural understanding – Lack of awareness in Belfast of the role of tourism in city transformation – Focus on short term initiatives rather than sustained support for priority projects – Lack of investment in new and improved facilities – Growing competition from other city destinations – Dublin’s status as gateway to Ireland increases – Market Failure in the Hotel Sector – Residual associations with the legacy of the conflict – Restrictive licensing laws

2.6 Identifying Belfast’s most prized tourism assets

Informed by the SWOT analysis are Belfast’s ‘hard assets and city software’. There are two strands to this analysis:

- **HARD ASSETS** (events, attractions, places and spaces) that best reflect the city narrative and have the potential to be further developed or leveraged as priority projects;
- **CITY SOFTWARE** (people, cultures, talent, skills, networks, clustering and ways of working) that can be harnessed and allowed to influence and infiltrate all aspects of tourism development.

In both cases we focus on those assets that provide clear differentiation, sense of place, existing or potential best in class status, internationally recognised and with real opportunities to be transformative in the way Belfast is perceived and presented as a destination of choice.

At the heart of this new strategy is the need to allow the ‘software’ assets to provide the cross-cutting themes that will influence the way all new ideas for product development, management and marketing should be developed in Belfast. In short, this means having a clearly defined and easily recognisable Belfast way of delivering tourism as the only sure way to deliver a competitive approach.

The ‘Belfast way’ is all about adding value through being: inclusive, interactive, intuitive, integrated, inspirational, inter-disciplinary and international.

Hard Assets	City Software
The city centre at the heart of a compact city with accessible countryside and coast surrounding it	World class reputation in many aspects of science, the arts and civic governance; innovation and creative talent
The built heritage of the maritime history: Customs House, Harbour Commissioners’ Office, Titanic Quarter, Merchant Hotel, Lagan	Culture: Music, Literature, Drama and Song Writing
Great venues for arts and culture: The MAC, The Lyric, The Ulster Hall, The King’s Hall, The Opera House	The people: communities, Icons, talent, resilience, ambition
Civic heritage: Belfast Castle, City Hall, Ulster Hall, Linen Hall Library, Old	Food and drink; chefs and producers and restaurateurs

MET College, Crumlin Road Gaol, The Courthouse, The Peace Wall, The Murals	
Ulster Museum and the Ulster Folk and Transport Museum Titanic Belfast	Excellence in specialist research and economic sectors: Digital Software, Food science, Aerospace, Life sciences, Sustainable development, Renewable technologies Marine activity
Queens University Belfast, University of Ulster	The 'Troubles' to peace story
Belfast Hills: Divis to Cave Hill, the Lagan Valley parks	The 'buzz' and vibrancy of the city
Festivals and Events: Belfast Festival at Queens, Cathedral Quarter Festival, Féile an Phobail, Titanic Festival	Innovative and ambitious Tourism operators
Conference and sports venues: Belfast Waterfront Hall (with new extension), The Odyssey, King's Hall Complex, three major sports stadia	Commitment to social enterprise And nurturing young people
T13 Urban Adventure	Tourism and other community Initiatives such as: Sport Changes Lives, Football4Peace, Draw Down the Walls
Popular culture, especially: Film and TV production (i.e. Game of Thrones)	

2.7 Current marketing delivery

Belfast developed a *place brand* in 2007. City branding creates a single, overarching, identity for the whole city and extends its offerings and interactions within a set framework of agreed values and creative presentation. From a customer perspective this creates a unique picture of the city at every level of interaction. A refreshed place positioning strategy for Belfast is urgently needed that embraces city development since 2007.

Within the current organisational structure, broader tourism marketing is fragmented. It needs to be much more collaborative and co-ordinated with much improved communications between the three main organisations (VB, TI and NITB).

As it stands, not only is there confusion over roles and responsibilities amongst the industry but there is an inevitable duplication of effort and sub-optimal use of resources. There are concerns in the industry that Belfast hasn't articulated clear messages for use by the marketing agencies.

Belfast is certainly not a mirror image of Dublin. Belfast's history, heritage and culture have developed a city destination that is unlike other urban centres in Ireland.

Belfast's status as a key driver of tourism in NI and with its potential to offer a city experience that is significantly different from that of Dublin (and indeed, Limerick, Cork, Galway, Derry-Londonderry) is vitally important. All stakeholders must recognise this to be the case.

There are very positive opinions about VB within the city's tourism industry at large. In particular the industry respects VB's committed team, the Ambassador programme and the level of private sector engagement and the work with its strategic private sector partners.

VB's performance is, however, restricted by the service level agreement approach adopted by its two main sponsors (BCC and NITB). The SLAs are agreed annually. They are seen to be far too prescriptive and have limited ability to be dynamic. Budgets are agreed annually however much more could be achieved with more stable funding – ideally with funding agreed for a three- five year period. This should incorporate regular reviews with a major review recommended mid way through the period of the strategy (2017-18) to ensure agreed targets are being achieved.

There needs to be shift in the nature of the relationships between BCC, NITB, TI and VB. Instead of SLAs the use of memoranda of understanding (MoU) offers a more open, flexible and collegiate approach. This would allow more executive decisions being made by VB as to the priorities for implementation.

The danger of the current approach is that is more driven by satisfying the interests of the sponsoring bodies and its member businesses than by a strategic imperative. VB needs to be freer and able to be much more proactive and dynamic in its work.

At present, the leisure marketing undertaken by VB is primarily limited to promotional activity in GB and ROI, often overlapping with the work of NITB and TI. Business tourism marketing is focused upon making sales bids to conference organisers and attendance at trade shows. This has begun to show some very positive results but more needs to be done in this sector.

The total available funding for this work in 2014 combining the budgets of TI, NITB, VB and others is likely to exceed £8million. There must be greater openness, discussion and agreement as to how this money is spent and by whom and for what purpose. NITB funding cuts announced in Autumn 2014, coupled with competing pressures on Council budgets, causes a concern and an even greater need to achieve optimum use of existing resources.

In terms of being a city destination marketing and management organisation (DMMO), VB is a relatively well-resourced organisation compared with its GB counterparts. Its performance is regularly scrutinised and its KPIs annually evaluated. However, in order to meet the goals of this strategy, the Board of VB must continue to learn from best practice. It is recommended that VB look at its organisational structure, its functions and how decisions are made in the context of this new strategy.

For example, the current Board of 25 people appears to be too large to consider tactical decisions. The full Board needs to meet twice each year to agree strategy and governance matters with a specially created 'Executive Board' to meet monthly to work closely with the officers on tactical opportunities.

Membership is a very important tool for engaging and involving a broad range of businesses across the city. VB has been very successful in developing this facet from which it generates c £175,000 per annum in membership fees.

It is important to maintain this engagement and this income but the opportunity should be explored of creating a separate company within VB to look after this aspect of its work allowing VB and its members to maintain all the existing benefits but distancing specific member interest away from strategic activity.

2.8 Macro issues constraining tourism development

Concerns raised during consultations are mirrored in the findings of the 'DETI Review of NITB and Tourism Structures'. These highlight a number of competitive disadvantages for tourism in Northern Ireland and directly impact negatively on the ability of Belfast to develop its tourism economy.

These are macro, often complex, issues. They need to be addressed collectively by all stakeholders and will involve higher levels of Government. Many are rooted in European and international geo-politics and regulations, which include;

2.8.1 Air access

There are widespread concerns about the limited air access to Northern Ireland. Consultees look inevitably and enviously to Dublin and its range, frequency and capacity of air routes linking it to important leisure and business tourism markets.

In the summer of 2014 the two Belfast airports were reporting a decline of 7% in carrying capacity over the previous reporting period whilst the overall air capacity to Ireland had increased by 14%.

DETI officials are working on an NI 'Air Route Development Fund', focussed on the development of new European routes into Belfast. It is recommended that this fund focus on the development of flights into European hubs including Schipol, Charles de Gaulle and Frankfurt. The Chancellor has also reduced air passenger duty for long haul flights.

2.8.2 Visa requirements within the island of Ireland

The issue of differing visa requirements of UK and Irish governments places NI at a significant competitive disadvantage. It is particularly impacting on tourism in Belfast.

There are moves to improve this situation. Changes need to be prioritised if tour operators, English as a Foreign Language students, leisure tourists and business travellers are to move efficiently and effectively between the ROI and NI.

2.8.3 Currency and VAT

The fact that Ireland operates within the Euro zone and NI uses sterling does variously impair / encourage and limits / stimulate some travel between the two areas, depending on exchange rates. It would seem that the most appropriate and tactical approach to overcome some of these issues is for businesses in Belfast to either consistently accept Euros or, at least, to offer prices and payment options.

There is currently a sustained campaign ('*Cut the Tourism VAT*') by the various representative voices across the UK to get a reduction on tourism VAT to be bring it into line with competitor countries. According to research by Deloitte (2013) reducing tourism VAT would not only enhance the UK's competitive position but would be the most efficient way of generating GDP gains for the Exchequer (creating an extra £0.6bn in revenue for the HM Treasury and creating 10,000 jobs in tourism over the next ten years).

SECTION 3: THE STRATEGY – DIRECTION OF TRAVEL

3.1 Introduction

There is a clear industry-wide desire to see tourism in Belfast grow. The city is ready to move to the next phase in its development as a city tourism destination. It has the potential to succeed in becoming one of the leading medium sized city destinations for leisure and business tourism in Europe. The vision, mission and strategy sets out how this can be achieved.

3.2 Vision

The **VISION** 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.

This vision is ambitious and bold. It harnesses the assets of Belfast, it builds upon the good work undertaken over the past 10 years and it responds positively to the emerging global trends driving tourism demand for city tourism.

The vision will require a shift in the emphasis of market focus and product development. All market research and market trends show that younger markets (under 35years) will increasingly dominate city tourism.

Belfast, as a city destination must appeal to a broad range of markets but the marketing and product investment must be increasingly geared to a 60:40 balance in favour of younger people. This will be achieved through strong partnership working; by investing in the attraction of clearly targeted leisure and business tourists; and attracting, nurturing and retaining creative talent.

3.3 Mission

Belfast - a city that wants to welcome the world and to share its story by creating a destination that the world wants to experience firsthand.

3.4 The strategic goal: double the value of tourism by 2020

There is only one overarching strategic goal, everything that follows is geared to this end, 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. This is predicated on a number of caveats, not least securing the investment to deliver upon the required actions.

3.5 Current markets: understanding the visitor segments

As a city destination, Belfast attracts five main tourist segments:

1. Day visitors; and those involved in at least one overnight stay
2. Discretionary leisure city break tourism; attracted by events, festivals, heritage, arts, culture, sports, retail, etc
3. Discretionary business tourism; attracted by meetings, incentive travel, conferences and exhibitions (the 'MICE' markets)
4. Non-discretionary business tourism; driven largely by independent corporate travellers that visit Belfast only because they have business in the city
5. Visiting friends and relatives (VFR); people who are visiting friends and relatives for social or family-related activities.

In the main, the focus of any tourism development strategy must be based upon generating discretionary tourist overnight stays especially higher value leisure and business tourism that will use commercial accommodation. This is the sector most likely to secure higher levels of visitor expenditure thus supporting more jobs across the city.

However, cities have complex tourism systems. Belfast must offer opportunities and develop its appeal to continue to attract each of these main market segments.

The NITB has produced a very useful series that explores the characteristics of the core markets for NI. These are based upon the extensive segmentation research undertaken by NITB in conjunction with TI.

Consequently, the current core visitor segments prioritised by NITB and TI for NI are set out in a number of important documents.

A good synopsis of these markets is to be found in the Intelligent Perspectives Guide “Bringing Experiential Tourism to Life for our Visitors” (NITB, 2014). They are shown below and provide a useful context for Belfast.

Table 2: Tourism market segments

Segment	Relevant market	Characteristics
Mature Cosmopolitans	NI/ROI	Older age group, frequent breaks, non-digital
Time Together	NI/ROI	Couples romantic weekends, food important, special offers
Family Fun	NI/ROI	Families with kids, focus on children, family activities
Young & Lively	ROI	15-34 urban breaks with friends, key is nightlife and events, looking for good time
Social Energisers	GB	15-34 groups and couples, action packed, fun-filled, city plus, adventure in the city
Great Escapers	GB	30+ couples getting away from busy life, attractive and easy access, clustering of activities important
Culturally Curious	GB	Older 45+ immersing themselves in culture, independent, want heritage and things to do.

Source: NITB

Belfast needs to place primary focus on marketing efforts on the younger market segments in table 2. Secondary focus should be on the Culturally Curious segment.

The report by Genesis Consulting for Tourism Ireland, “GB Tourism Market Strategy: Unlocking the Code for Growth”⁵ concluded that:

“In comparison to ROI and GB destinations, NI is at an early stage of development as a holiday destination. For this reason it will require a concerted effort of all stakeholders to change attitudes, develop and communicate compelling reasons to holiday here.”

The Genesis report highlights the fact that NI’s image perceptions are most strongly related to political unrest and violence and markets have a latent fear that they will not

be welcomed in NI. This important point is made in the DETI Review of NITB and Tourism Structures and is a consistent, oft repeated, concern amongst consultees.

Both of these comments are pertinent and remain relevant when considering the appeal of NI to GB market segments.

3.5.1 The importance of young markets in this matrix

In the NITB report, “Keeping up with the Millennials: How this generation’s coming of age is important for tourism in Northern Ireland” are recognised as being the off-spring of the ‘Baby Boomers’ and are now aged between 15-34 years. This is regarded as a key market for NI and for Belfast.

Millennials are connected, marketing savvy and are pioneers of new experiences and destinations. They are technologically astute. In many ways they reflect the characteristics for new ideas and seeking out fresh destinations as did their parents in the 1960’s and 1970’s.⁶

There is a lot of synergy between the young and the young at heart in today’s tourism market place. This is reflected in the inter-generational travel that is now taking place.

Millennials are vitally important for developing tourism in Belfast for the following reasons identified in the NITB report:

- Older Millennials are expected to reach their peak spending years between 2017 and 2020
- More will enter parenthood and will drive the family market in the later part of the next ten years, so catching them now has the potential to make them ‘ambassadors for Belfast’ in the future
- Millennials have high expectations, they are influenced by ‘peer power’
- Millennials will drive trends in business travel as they climb the career ladder; by 2020 they will be key decision makers; The Boston Consulting Group suggests that by 2025 the Millennials will command a 50% market share of all business flights.

⁶ “The New Greatest Generation: Why the Millennials Will Save Us All”, 2014, Stein, J, TIME.

3.6 Strategic priorities

In a very competitive, global, tourism market place, the only true differentiator is **Belfast**, its story, its character and its people. An essential starting point for the tourism strategy and the competitive positioning of Belfast has to be an understanding of the city and its people. This story and narrative is a powerful tool for growing tourism when handled carefully and imaginatively.

There are a number of key strategic priorities and principles that underpin the strategy supporting this;

- **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
- **A city of Urban Adventure:** as a principle, this must be encouraged. Innovative solutions must be found to deliver the urban experiences desired by the younger markets
- **Beyond Peace:** Belfast has a global role to play in this area. Belfast is recognised worldwide as a city region that has emerged from conflict. The world wants to learn from these experiences. This will be a fundamental part of the business tourism strategy
- **Be International:** Belfast is city of international significance. Greater focus needs to be placed on outward looking initiatives i.e. looking to International best practice in skills development both at a leadership and entry level.
- **CSR agenda: ‘The giving city’;** Belfast could become the first city in the world whose tourism industry (businesses and our 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’
- **Focus on youth and younger markets:** marketing and product development initiatives should prioritise these segments reflecting the overall city narrative
- **Belfast way of working:** Belfast’s ‘*state of mind*’ is intelligent, inventive, imaginative, industrious, industrial, welcomes fresh ideas and nurtures hybrid innovation. Belfast’s ‘*way of working*’ is inclusive, interactive, intuitive, integrated, inspirational, inter-networking, inter-disciplinary and international.

3.7 What has to be achieved over the next five years?

If the ambitions of the tourism strategy are to be met by 2020, it will be important to achieve the following:

- Clear positioning: understanding and expressing our unique selling points and communicating that message to key markets
- Establishing a reputation as a global leader for delivering innovative, highly satisfying, tourism experiences that will strengthen the emotional connections between the tourist and the city
- Making Belfast a destination of choice for increasing numbers of leisure and business tourists
- Increasing the city's year-round appeal as a value added, high quality, leisure and business tourism destination, thus increasing visitor satisfaction, length of stay and expenditure;
- Creating prosperity and new opportunities to improve the quality of life for all residents and securing widespread community support and recognition of the importance of tourism to the city's economy.

3.8 The return on investment

Assuming that the actions are delivered as advised and that the investment of resources takes place in accordance with the strategic recommendations, then the value of tourism to the Belfast economy is expected to grow from £438m now to £870m per annum by 2020 (based on existing metrics). Therefore, in the five years from 2015 to 2020 the total value of tourism to the city's economy could be in excess of £3bn.

SECTION 4: THE STRATEGY – HOW DO WE DELIVER UPON THE STRATEGIC GOAL AND VISION?

4.1 Introduction

Delivering the vision requires a focus upon specific actions. These have been grouped under three priority axes of development. These are:

1. **Reputation management:** this relates to having strong leadership, a committed partnership approach built on trust and openness and having clear roles and responsibilities. It is also about having a bold, aspirational brand and marketing strategy based upon robust market research, being more international in our approach and developing a USP through a unique CSR programme in which revenues are re-invested to support future tourism growth
2. **Capacity building:** there is a need to focus on improving accessibility to the city and marketing existing opportunities from primary originating markets overseas, especially in GB and Europe as well as creating a customised human resource development programme and focusing on quality assurance and hospitality excellence
3. **Innovative product development:** this involves investing in appropriate, market focused and innovative product development in order to improve the offer to the visitor and to driven further spend within the sector.

4.2 Focus on delivery

Achieving this goal will require new ways of working. Principally, this will involve a new high level collaborative team approach between BCC, NITB, TI and VB with refined and clearly defined roles and responsibilities cemented by memoranda of understanding as to who will do what (ideally by Spring 2015).

Given the diverse range of activity and need for some developments to take place in parallel, it will be important to consider the establishment of a number of Task and Finish groups to further develop the scope of the projects and to develop implementation and resource plans.

This strategic approach means making hard decisions about what, where and how to invest in the future. It will also require maturity on the part of the key organisations, considering optimal use of resources and focusing on opportunities for collaboration in

order to maximise the impact of available resources. This will ensure a better return on investment for public and private sector investors at a time when public resources will come under even greater pressure for prudent use and secure wide ranging benefits and opportunities for the whole community.

This focused approach is not at the exclusion of other work. It doesn't mean that, for example, in focusing upon younger markets that marketing stops to other segments. Instead it is about prioritising over the next five years.

4.3 Action plans overview

In order to deliver on the ambition of the tourism strategy, a series of detailed action plans have been developed. These set out the range of key actions/activities, long with potential member organisations and an assessment of timescales for the delivery of the activities. Each Action Plan will be the responsibility of a Task and Finish Group (TaFG) who will meet on an 'as needs' basis and whose existence will last until the task is completed and the plan implemented. Membership of each TaFG will be 'by invitation'. Where a lead is suggested in each action plan this is highlighted in bold. This organisation will be responsible for convening the task group and providing secretariat support.

The high level action plans overview is detailed below.

4.3.1 Reputation management development axis: key action plans

Doing a few things really well is the key to destination reputation management and positioning; it brings cohesion to destination management and marketing. It sets the tone, quality standards and performance expectations for the rest of the destination. In this regard, six action plans are to be developed. These are:

- Marketing activity
- Visitor management
- Business tourism
- Branding/city positioning
- Tourism events and festivals
- Corporate social responsibility.

Marketing Activity

Marketing activity requires a much greater focus and coordinated approach than at present. Visit Belfast needs to develop a Memorandum of Understanding with NITB and Tourism Ireland to ensure optimal use of budgets and to ensure that messaging is aligned and joint targets agreed.

Marketing activity needs to prioritise younger markets; focus on growing overnight stays; focus on those UK Cities with direct flights into Belfast; increased focus on digital marketing in line with key market segments.

Campaigns should be monitored rigorously with clear performance indicators in place.

Theme	Potential Projects	Suggested Task Group	Year Required
Partnership Working	MOU with clear delivery parameters	VB, TI, NITB, BCC	2015
	Joint Marketing approach with TIL in cities with direct access	VB, TI	2015-2020
	Joint Marketing approach with NITB in all Ireland context	VB, NITB	2015-2020
Tourism Monitor	New Tourism Monitor in Place with a focus on Hotel occupancy and social media based research	BCC, VB, NITB, NISRA, DETI	2015-2020
Segmentation	Increased focus on 16-35 Markets and Young at Heart audience. Proposed 60:40 split with Culture Seekers	VB, TI, NITB	2015 -2020
Focus on growing overnight stays	Increased focus on campaigns	VB, TI, NITB	2015-2020
Focus on marketing to those Cities in the UK with direct air access	Sustained campaigns collectively agreed and resourced	VB, TI, NITB	2015-2020
Increased focus on digital marketing	Review resourcing and effectiveness of digital marketing of the city	VB, NITB, TI, BCC	2015

Visitor Management

Visit Belfast will lead on visitor servicing activity for Belfast, working largely in conjunction with the NITB. Visit Belfast's role as a Destination Management and Marketing organisation (DMMO) will be critical in the delivery of quality visitor experiences.

Visitor Management will also include elements of routes and trail development ensuring effective movement of visitors throughout the City. This theme will also include the development of air access into the destination.

Visit Belfast must deliver a fully integrated visitor experience for major conferences and events in the City. Task groups should be engaged in this regard at the appropriate times.

Theme	Potential Projects	Suggested Task Group	Year Required
Visitor Servicing	Management of Belfast Welcome Centre	VB, NITB, BCC	2015-2020
	Management of BIA and Belfast City Airport Provision	VB, NITB	2015 onwards
	Provision of Coach Parking	VB, FPT	2015 onwards
	Oversight of City Coach Tours	VB, DVA, BCCM, BCC	2015 onwards
	Enhanced Trail and Route Development across the City and beyond	BCC, VB, NITB, Outdoor NI, Translink	2015 onwards
	Enhanced Euro Provision across the destination	VB, Banking sector	2015 onwards
	Delivery of a Cruise Terminal at the Harbour	Harbour Commissioners, VB	2015
	Integrated Visitor Pass	VB, BCC, NITB	2016 onwards
Air Access	Working with both Belfast Airports to ensure enhanced air access	DETI, BIA, Belfast City Airport, VB, BCC, TI, NITB	2015 onwards

Business Tourism

The redevelopment of the Waterfront Hall as a conferencing and exhibition venue has the ability to significantly transform the scale of business tourism in the city. The focus for business tourism should be on establishing a reputation as a city with a strongly differentiated approach for welcoming business tourism events focussing upon a destination wide proposition.

Focus should be placed on attracting conferences and incentive visits that align with the City's strengths i.e. Beyond Peace, focus on youth markets, maritime heritage as well as those areas where Belfast has true International standout. This should be prioritised on an 80:20 ratio, so as not to the neglect of events which can provide significant economic returns. This will enhance the perceived integrity of the city offering.

A subvention fund should be considered in relation to conference tourism as a partnership approach between BCC and DETI/ Invest NI/ NITB. However, added value can also be part of the subvention offering. A holistic approach to servicing major conferences and events while taking place in the city should be led by VB. This is an important aspect of the unique offer and part of a 'subvention package'.

Theme	Potential Projects	Suggested Task Group	Year Required
Marketing & Sales	VB to lead on City Sales and Marketing activity	VB, Waterfront Hall, NITB, NIHF	2015 onwards
	MOU in place to ensure resources aligned	VB, NITB, TI, Waterfront Hall	2015 onwards
	Belfast Ambassador Programme resourced and managed	VB	2015 onwards
	Attendance at appropriate trade shows and events	VB, TI, NITB	2015 onwards
	Enhanced packaging of products to add value to the conference experience	VB, BCC	2015 onwards
Subvention	Organise a bid fund to attract International Conferences	DETI, BCC, NITB,	2015 onwards
Research	Detailed analysis of Belfast's areas of International prominence	VB, Waterfront Hall, BCC	2015 onwards

Branding/ City Positioning

A competitive city positioning strategy needs to be developed. This should be embedded in all city strategies and utilised by all agencies and businesses representing the city. The current positioning is unclear and doesn't reflect Belfast in 2014. International research undertaken as part of this strategy confirms this.

The competitive positioning needs to reflect the strategic priorities and principles as outlined in 3.6 in this strategy.

Theme	Potential Projects	Suggested Task Group	Year Required
Commission place positioning strategy	Strategy Commissioned	BCC , VB, Invest NI, TI, Investment Agencies, Universities, Private sector	2015
	Delivery Plan outlined	City Leadership Group	2015-2020

Tourism Events and Festivals

Events and festivals are very useful tools to help drive tourism, extend the tourism season and enhance the city's profile; they are also good at facilitating networking and links with global brands. At present the existing festival programme doesn't significantly attract out of state tourists to Belfast.

From a tourism perspective, Belfast should continue to bid to host one major international event each year that is consistent with the city narrative and target markets. In addition, Belfast should support six unique signature events, designed in line with the city narrative, internationalisation and the target markets.

Signature events should:

- Attract significant out of state visitors
- Attract significant International PR and coverage
- Support the Belfast City narrative
- Take place throughout the calendar year including shoulder months
- Be able to attract additional sponsorship from private and public sectors.

There are a number of events within the city which could be developed to fit the brief or new events that could be developed.

There will be an increasing need to align with and seek significant private sector sponsorship and involvement in developing events in the light of cuts to NITB's events funding. There is also an opportunity to look at developing the tourism events and festivals scheme as a grant programme, with a three year rolling programme of activity being made available (subject to resources).

The City Council should also continue to support a palette of events and festivals for local residents. These are not included in the number outlines below.

Theme	Potential Projects	Suggested Task Group	Year Required
International/ Global Events	Attract 1 International Event per annum	BCC, VB, NITB, TI, BCC ,	2015-2020
Signature Events	Develop 6 Belfast Signature Events	Event Organisers	

Corporate Social Responsibility

Global tourism trends are all highlighting the need for city destinations in the western world to enhance their reputations and competitive positioning by adopting collective responsibility programmes. This was well evidenced at the opening ceremony of the Commonwealth Games in Glasgow in July 2014. Underpinning the whole celebrations was a profound message and a commitment to raise money from the Games to support UNICEF.

These type of events and destination-wide CSR initiatives significantly enhances a destination's ability to align to attract corporate businesses and conferences whose own philosophies involve CSR. It is also a strong hook for the youth markets. Thus, it is an important part of Belfast's future positioning.

Effectively, the type of CSR programme is about raising revenue from tourist activity such as visitor voluntary gifting to create funds to share with the disadvantaged in other countries and to support projects to develop communities in Belfast.

Over the years Belfast has been the recipient of considerable financial support from many different sources. As the city matures as a destination it can shift its 'message' from being a recipient to being a giver of opportunities, hope and money to others.

Theme	Potential Projects	Suggested Task Group	Year Required
Development of a Structured CSR City wide programme	Projects targeted at creating opportunities for communities in Belfast and International destinations emerging from conflict	BCC, City Airport, Community organisations, private organisations	2016-2020

4.3.2 Capacity building development axis: key action plans

Professionalism within tourism and the wider hospitality sector needs to be addressed. There is currently a deficit at leadership and operational levels within the city. Studies undertaken by DEL and People 1st clearly articulate this point.

It is vital for the future well being of the City's tourism economy that these issues are addressed by the relevant authorities. International best practice should be considered in developing the solution. Institutions such as the Swiss Hotel School, MIT and Cornell are best in class internationally.

The main action plan under this theme is the focus on hospitality excellence. This involves a dedicated focus on skills development at all levels within the industry, particularly at the higher skills levels.

Theme	Potential Projects	Suggested Task Group	Year Required
Hospitality Excellence	International Hotel School Located in Belfast	BCC , QUB, UU, Belfast Met, Hotels Federation, DEL	2020
	Tailored support programme delivered at future leaders level utilising International Best Practise	BCC , QUB, UU, Hotels Federation, MIT, Cornell, Invest NI, DEL	2015-2020
	Review of existing tourism and hospitality training provision in NI	People 1 st , DEL	2015
	Tailored programmes designed to encourage opportunities at entry level of the hospitality sector	People 1 st , DEL , Belfast City Airport, Belfast Met, Private sponsors	2016-2020

4.3.3 Product development axis: key action plans

The product development programme must be prioritised around key market segments. In many cases, the public sector will play a facilitation role rather than delivering on many aspects of this.

Product development must be in line with the target markets, it must strengthen the concept of an urban adventure, it must fill existing gaps in provision, it must stimulate innovative new tourism products and it must be designed and delivered within the new 'Belfast way of working'.

International best practice demonstrates the opportunity for city-based tourists to explore the wider area / region thus giving reasons to extend their stay; leading city DMMO's have adopted a 'city +' approach to developing day trip packages for their visitors.

Developing a critical mass of product that gives coherence and understanding of the destination which is important for tourists: there needs to be sufficient things to do and see in concentrated areas thus avoiding dilution of the product. The 'quarters' are an example of a coherent tourism offering.

Recent investment in new tourism assets such as Titanic Belfast, SS Nomadic, The Mac, Belfast Hills Trails etc must now be maximised by providing seamless visitor experiences that support the key themes of the city and that meet the needs of each visitor segment. This will require collaboration amongst the industry.

Investing in strategic projects, events and places that play strongly to the city's assets and which fit with the vision have to be supported in order to make an impact; this must allow distinctiveness to break through and it means working with those assets most capable of making a difference. There are a number of key products identified and there is a need to undertake further analysis and development to scope out the scale of the opportunity and to consider how resource requirements may be met. Some key product development opportunities are identified under the respective themes identified overleaf. Reference is also made to how these products sit alongside the current NITB themes, within which they focus their investment.

Theme	Potential Projects	Suggested Task Group	Year Required	NITB Themes
Contemporary Art and Design	International Quality City Centre located Attraction	BCC , Arts Council, NITB, Private Sector Operators	2020	Culture and Creative Vibe and Living Legends
	Utilise outdoor spaces to create the City as a Gallery including use of vacant spaces		2017	
Urban Sports	Urban Sports Hub	T13, Titanic Quarter Ltd	2020	
	Range of minor infrastructure i.e. zips lines, urban mountain biking	Outdoor NI , Sports NI, BCC, Ideas Factory	2017	
	Mountain Bike Trails in Belfast Hills	Belfast Hills Partnership, National Trust, BCC, Outdoor NI , Ideas Factory	2018	
Maritime Tourism	Additional activity including water taxis,	Private Developer, ideas factory	2017	
	Floating Hotel	Private Developer	2020	
	Maritime Visitor Experience	BCC , NITB, Lagan Canal Trust, Harbour	2020	
Accommodation	Requirement for 1500 new hotel bedrooms	BCC, VB, Hotels Federation, Invest NI , NITB	2020	Culture and Creative Vibe and
	Development of 5 star hostel accommodation	BCC, NITB, Invest NI	2018	

	Research new accommodation types in keeping with target segments	NITB , BCC, Ideas Factory	2015	Living Legends
Screen Tourism	Creation of a year round showcase to celebrate Screen industry	NI Screen , NITB, Invest NI, TQ, BCC, Ideas Factory	2020	
Belfast Story Exhibition	Delivery of a permanent Belfast Story exhibition in Belfast City Hall	BCC , Magni	2017	
Experiential/ soft product development	Delivery of a suite of 'soft product development' initiatives throughout the city	BCC , NITB , Ideas Factory	2015 - 2020	
Beyond Peace Theme	Development a programme of activity to enhance the offering and connection with visitors	BCC , community based partnerships	2015-2020	

SECTION 5: DELIVERY MECHANISMS

5.1 Introduction

The strategy demands refinement and then, clarification, of roles and responsibilities of the main organisations namely BCC, NITB, TI and VB.

It sees a stronger but much more focused destination management, marketing and leadership role for Visit Belfast working in very close partnership with BCC. Together the two organisations will drive the delivery of the Action Plans supported by NITB and TI. Belfast City Council will be responsible for harnessing public sector activity and VB will focus on the private sector.

Belfast needs to have a collective rapid response approach, to enable it to be flexible, to move fast to take advantage of opportunities as well as injecting much needed dynamism in the industry. This - alongside public sector funding cuts – may necessitate looking at new sources of funding for investment have to be sourced including non-traditional investors (from crowdfunding to sovereign funds) and new business models.

5.2 Roles and responsibilities

The former CEO of European Cities Marketing, Professor John Heeley, has recently predicted the future of city tourism management and marketing organisations⁷. He suggests that:

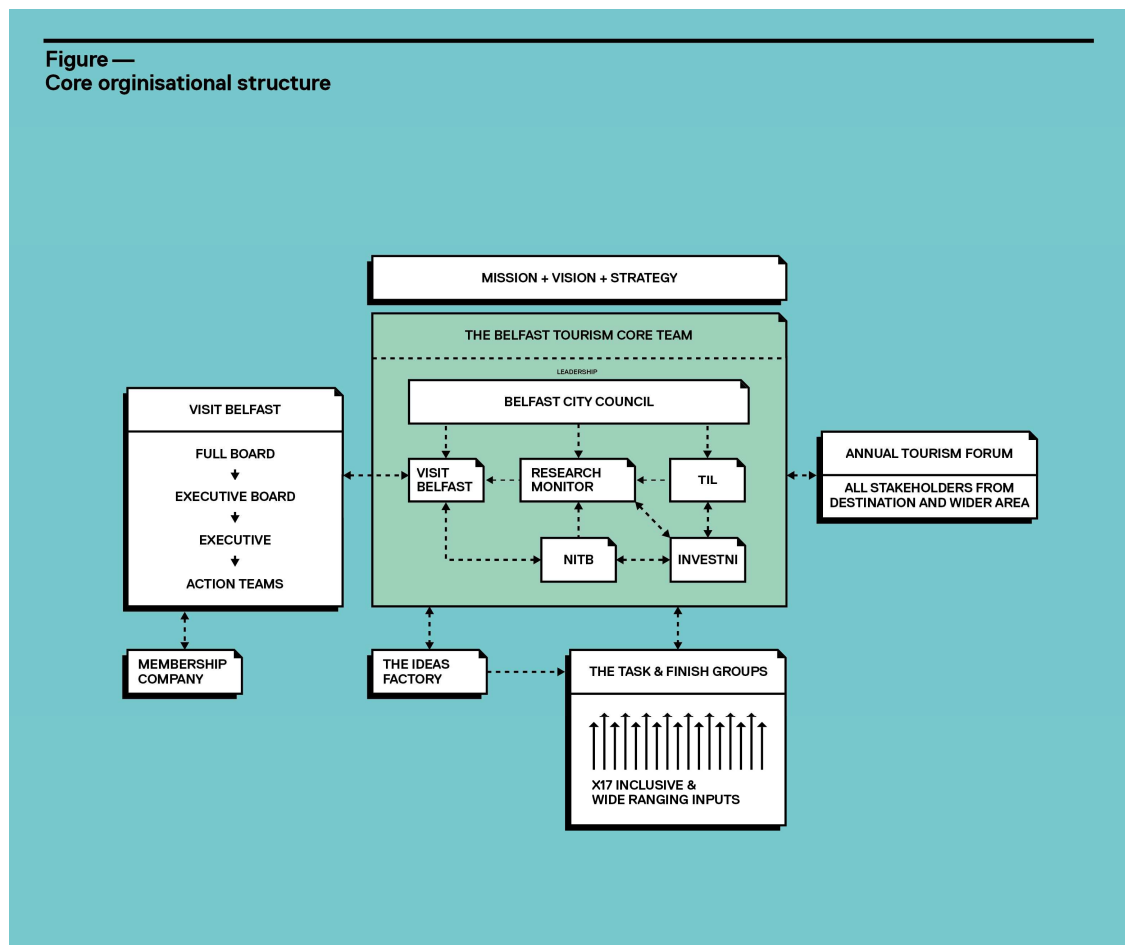
“There can be no prescribed right or wrong type of organisational structure but there will be a shift towards more private – public partnerships with more devolved resources and activities migrating to arms length organisations”.

Lead organisations will have to become ‘fitter’, financially more stable (three – five year agreed funding programmes) and rationalised to have a sharper focus on what will make a difference. There is also a need to look at developing an evidence-based approach to

⁷ “Inside City Tourism: A European Perspective.” (2011), Channel View Publications.

action. New technologies mean that there are opportunities to access “real-time” information on performance and this should be available to and used by all those involved in tourism development within the city in order to inform decision-making.

Establishing a partnership alone is no guarantee of success. In terms of developing tourism in Belfast the four key organisations – BCC, NITB, TI and VB – must shift their working practices to a true partnership model based upon absolute openness, transparency and trust.



5.2.1 Belfast City Council

The delivery of the public sector and ensuring that BCC fully understands and supports the development of tourism in the city across all of its departments, plans and policies; working in partnership with VB to determine strategy, branding and programmes of work.

BCC has to be the key partner that enables the public sector and ensures that the Council's policies, plans and investments fully supports the development of tourism.

This partnership approach between the four organisations has to be driven and led by Belfast City Council.

Belfast City Council must focus upon creating an efficient environment (policies, services, infrastructure, financials) to support the strategic direction and provide the essential civic leadership.

5.2.2 NI Assembly and government departments

Through its various departments to create an environment within which tourism in Belfast can flourish; tackling the macro issues that currently limit tourism growth is a priority.

5.2.3 NITB

NITB will fully support the development of tourism in Belfast through strategic developments, positioning, visitor servicing and marketing advice. It will also engage in collaborative marketing campaigns within NI and the ROI and support investment projects for the city.

NITB funding cuts in the Autumn of 2014 reduces the organisation's role as a core funder on the many aspects of the development work to be done in the immediate term. However it remains a strong and important strategic body in delivering on the ambition within this strategy.

5.2.4 Tourism Ireland

Tourism Ireland will fully support the development of tourism in Belfast through strategic branding and marketing advice; and a transparent, collegiate approach to collaborative marketing within GB, European and overseas markets. It can also provide excellent support through market intelligence and analysis.

5.2.3 Visit Belfast

VB must be the drivers of ambition, consumer facing and guardians to ensure overall visitor satisfaction. The organisation needs to operate as an effective and efficient organisation whose *modus operandi* needs to be based on (a) international best practice and (b) the new job to be done in Belfast.

There needs to be a shift away from VB operating on a year-to-year funding programme; it needs stable three year funding, with a possible two year extension until 2020; there needs to be a shift away from a service level agreement with BCC and NITB to the use of MoU's that is more collegiate and reflective of a partnership / collaborative approach.

VB, as the destination's management and marketing organisation, has to be the tourism industry's lead body in the city. It has to provide leadership for the private sector and the bridge with the public sector. It has to be the primary focal point of delivery of the visitor promise, it has to develop the greatest capacity for managing Belfast's competitiveness and be the catalyst for action.

Increasingly city destination marketing organisations are becoming destination marketing and management organisations (from DMO to DMMO). There is also fundamental re-thinking of the way DMMO's will need to work in the future being undertaken by The Institute for Systemic Management and Public Governance (IMP-HSG) at the University of St Gallen (Switzerland) working closely with the Federal Government of Switzerland.

5.3 The Ideas Factory

An integral part of the delivery structure should be the concept of 'The Ideas Factory'. This should be a private sector led 'think tank' at the outset, which should harness innovation and the entrepreneurial thinkers within the City to develop unique approaches to deliver the 'Belfast Way' of doing things.

Ideas developed should be utilised by the aforementioned agencies to shape thinking around key tasks within the strategy. This will deliver innovative solutions that will deliver upon the City's brand messages. This 'think tank' should be encouraged to develop as a business in its own right.

Consideration will need to be given to governance structures and management arrangements around this. However, given the imperative around innovation and new product development, it is considered that this entity can play a critical role in identifying new solutions to product development and capacity challenges within the city, ensuring that we stay ahead of the game.

5.4 The Tourism Partnership

Activity should be monitored throughout the period of the strategy and reported back to a management group called 'The Tourism Partnership' which includes Senior Management from the public and private sectors. Ideally this group should have a membership of up to 12 participants and can co-opt additional membership as required. This Tourism Partnership should fit into a wider 'Belfast Agenda' grouping.

The City Tourism Management group including BCC, VB, TI and NITB should report on activity to the Tourism Partnership on a six monthly basis. As with the Ideas Factory, further consideration will need to be given to governance arrangement around this.

5.5 Measuring success

The overall measure of success will be the attainment of the doubling of value of tourism by 2020. The performance indicators must be entirely related to reputation management, capacity building and product development.

These will be agreed by each group and ratified and embedded in the work of the tourism partnership and the various MoUs.

Tourism businesses are becoming more sophisticated in the metrics they are using to measure success and these metrics need to be applied to the destination as a whole.

It is important that all of the key agencies work together to agree collective metrics for tourism ensuring resources are optimally used and provide a coherent message for the city. This will allow accurate measures for destination management.

Measures of success must directly reflect the targets for the strategy and address ways of measuring changing perceptions, reputational management, brand awareness and levels of CSR achieved.

5.6 Next steps

This draft strategy will now be considered by Belfast City Council, before undertaking a public consultation exercise on the document. Subject to council approval, this consultation will commence in January 2015 and run for a period of 12 weeks.

Following the consultation exercise, the document will be taken back to the council for final ratification.

In parallel, there will be engagement with partners to ascertain their commitment to the strategy and its individual components and to put in place operational arrangements for delivery from April 2015.