



<b>Subject:</b>	Make Yourself at Home – Tourism Plan
<b>Date:</b>	8 September 2021
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<b>Restricted Reports</b>	
<b>Is this report restricted?</b>	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
<b>If Yes, when will the report become unrestricted?</b>	
<b>After Committee Decision</b>	<input type="checkbox"/>
<b>After Council Decision</b>	<input type="checkbox"/>
<b>Some time in the future</b>	<input type="checkbox"/>
<b>Never</b>	<input type="checkbox"/>

<b>1.0</b>	<b>Purpose of Report or Summary of main Issues</b>
1.1	At a meeting of City Growth and Regeneration Committee in August 2020, it was agreed that a ten-year tourism plan for Belfast would be developed. The purpose of this report is to provide a draft of the proposed plan, <i>Make Yourself at Home</i> and seek approval to commence public consultation in October 2021.
<b>2.0</b>	<b>Recommendations</b>
2.1	The Committee is asked to: <ul style="list-style-type: none"><li>- Note the contents of this report and agree to commence a 12-week consultation period from October 2021.</li><li>- Agree to hold a workshop with Members to discuss in detail the priorities set out in the plan.</li></ul>

3.0	<b>Main report</b>
3.1	<p>Members will be aware that at a meeting of City Growth and Regeneration Committee in August 2020 it was agreed that a new ten-year tourism plan was to be developed. The purpose of this plan is to:</p> <ul style="list-style-type: none"> <li>- Deliver on the tourism priorities set out in the <i>Belfast Agenda</i> recognising the importance of tourism to <i>Growing the economy</i> and <i>City Development</i>.</li> <li>- Align to the ten-year cultural strategy, <i>A City Imagining</i>, in order to ensure that tourism development supports cultural development and is based upon an authentic and sustainable Belfast offer.</li> <li>- Support economic and social recovery in the context of COVID-19 including stabilisation, recovery and growth with the opportunity to build back better.</li> <li>- Provide strategic context to the Belfast Region City Deal that sets out wider city priorities to ensure Belfast’s appeal internationally and ability to attract out of state visitors.</li> </ul>
3.2	<p><b>Tourism Growth Pre Covid-19</b></p> <p>In August 2019 Belfast City Council agreed a new ten-year cultural strategy, <i>A City Imagining 2020-2030</i>, to drive transformation in the city. For the first time, the scope of this strategy brought together under one compelling vision a number of areas including tourism, culture, heritage, arts, events and festivals. <i>A City Imagining</i> (cultural strategy) and <i>Make Yourself at Home</i> (tourism plan) should be seen as part of an overall strategic approach with strong alignment and interdependencies.</p>
3.3	<p><i>A City Imagining</i> acknowledges that whilst Belfast has enjoyed relative growth in tourism over recent years that in turn has supported regional development, it is necessary to continue to support sustainable tourism development and job creation. Belfast’s first community plan, the <i>Belfast Agenda</i>, also articulates the importance of delivering a culturally vibrant city both for residents and visitors as well as acting as an attractive driver for inward investment. In order to continue to build on the value of out-of-state tourism and welcome more overnight stays in our visitor accommodation it is essential that we collaborate with our tourism sector to evolve, broaden, deepen and expand the tourism offer currently available in Belfast.</p>
3.4	<p>Despite significant growth and the success of flagship projects such as Titanic Belfast there is still a gap in scale and maturity of the local industry when compared with other regions. Notably, Northern Ireland lags behind UK regions and Republic of Ireland with respect to</p>

	<p>tourism as a driver for job growth. However, the positive trajectory in place before Covid-19 had identified tourism growth as both feasible and a necessary part of inclusive economic growth. The challenge of any tourism development plan will be to create a sustainable model that continues to support the growth that is essential for city success and the creation of jobs.</p>
3.5	<p>Belfast's tourism and hospitality sectors directly supports 19,300 jobs, one third of the sector in Northern Ireland. Key tourism sectors such as Accommodation &amp; Food Services, Arts, Entertainment &amp; Recreation and Transportation have been impacted by COVID-19 however if Belfast's recovery from the pandemic is managed then the growth potential remains high. The hospitality sector is an employment-intensive one, supporting a disproportionate number of jobs compared with the average sectoral GVA: jobs ratio. Between 2013 and 2019 employment in Accommodation and Food Services in Belfast increased by 18.2 percent, compared with 8.5 percent growth in the city's total employment.</p>
3.6	<p>It was in this context that Tourism NI set the ambitious target of doubling the value of the tourism industry to £2 billion by 2030. A key element of this opportunity further reinforced by ambitions of the Belfast Region City Deal was getting a bigger share of the international visitors coming to the island of Ireland to travel to Belfast and the Belfast region.</p>
3.7	<p><b>Impact of Covid-19</b></p> <p>While the full impact of Covid-19 is as yet unknown what is clear is that recovery will require new and innovative approaches in an increasingly competitive market. As the regional driver, Belfast will be hugely significant to this growth ambition, both in terms of visitor spend and the creation of new jobs. It is therefore imperative that our city break destination is developed in a strategic way which maximises the economic benefits that can be derived from tourism for local industries, businesses and communities, as well as increasing visitor numbers and spend and improving overall satisfaction levels.</p>
3.8	<p>In advance of the development of the tourism plan, Ernest and Young were commissioned to assess the potential impact of COVID-19 on the city. The report recognises Belfast's role in regional tourism:</p> <ul style="list-style-type: none"> <li>- Belfast is an important attractor for international, high value tourists to the region.</li> <li>- Belfast's share of out of state tourism spend has been significantly higher than the NI-wide share (83% v 72%).</li> </ul>

	<ul style="list-style-type: none"> <li>- Spending by tourists in Belfast has outpaced the NI average, growing by 20% year on year compared to 4.5% regionally.</li> <li>- Belfast has grown at a faster rate than the rest of NI mainly because of its attractiveness in two high value markets – city breaks and business tourism.</li> </ul>
3.9	<p>The report also sets out a number of scenarios depending on the length of the pandemic and recovery trajectory. Below is set out a series of recommendations specific to Belfast and need for stabilisation, recovery and longer-term growth. These recommendations have formed the basis for the strategic priorities and actions set out in the draft tourism plan.</p>
3.10	<p><b>Develop tourism supply in Belfast to foster a sustainable economic model creating jobs and improving local quality of life</b></p> <ol style="list-style-type: none"> <li>1. Bring forward renovations or upgrading of tourism facilities to support the economy and improve the quality of the tourism offer in Belfast.</li> <li>2. Pursue planned City Deal investments following a dynamic model based on regularly updated visitor numbers and visitor behaviours.</li> <li>3. Focus on the development of resilient tourism attractions (e.g. mix of outdoor and indoor spaces, online content, attractive to locals) and mitigate the impacts for the most impacted sectors (e.g. business tourism).</li> <li>4. Launch a wide consultation with key stakeholders and locals regarding the role tourism should play in a city like Belfast (e.g. urban regeneration, housing, sustainability, jobs, social inclusion, international attractiveness).</li> <li>5. Identify ways for Belfast or specific attractions within the City to be distinguished internationally (e.g. awards, UNESCO, travel guides).</li> </ol>
3.11	<p><b>Developing a ten-year plan</b></p> <p>The draft ten-year tourism plan has taken into consideration these initial recommendations alongside the existing commitments outlined in the Cultural Strategy that identified the four areas where Council could make the most difference:</p> <ul style="list-style-type: none"> <li>- Increasing the coherency of the Belfast experience</li> <li>- Supporting quality authentic product</li> <li>- Developing skills</li> </ul>

<p>3.12</p> <p>3.13</p> <p>3.14</p> <p>3.15</p> <p>3.16</p>	<ul style="list-style-type: none"> <li>- Strengthening the city's position through marketing and communications</li> </ul> <p><b>The approach</b></p> <p>The past two decades have given rise to a number of trends within tourism development. This has included the popularity of approaches such as cultural tourism, green tourism or local tourism. What each of these approaches and associated models have in common is an increasing awareness that sustainable forms of tourism must respect the local context and support the economic, social, environmental and cultural values of a place.</p> <p>In the context of Belfast, even before COVID-19, this is a complex proposition. The city requires further growth with a clear international agenda and need to continue to attract and grow out of state visitors. The new 10 year tourism plan seeks to set out how this growth can be achieved in a responsible and inclusive way recognising that the city's greatest asset is its people.</p> <p>The plan sets out a shared vision for tourism in the city and will be supported by 4 strategic themes and three of catalyst projects. The draft strategic themes are:</p> <ul style="list-style-type: none"> <li>- Grow Belfast</li> <li>- Experience Belfast</li> <li>- Position Belfast</li> <li>- Sustainable Belfast</li> </ul> <p>Each theme is supported by an evidence-based body of work and research.</p> <p><i>Strategic theme 1: Grow Belfast</i> (supported by EY Recovery report)</p> <p>This theme focuses on the role of tourism in city recovery including the need for stabilisation of the tourism sector and the requirement for further growth in Belfast. This includes:</p> <ul style="list-style-type: none"> <li>- Strategic context and evidence-based proposition that Belfast acts as a catalyst for the region.</li> <li>- Measurement of the attractiveness of the city as a destination and how this plays a key role in maximising the economic impact of each visitor by increasing average length of stay and daily spending levels.</li> <li>- Priority areas for investment e.g. catalyst projects.</li> <li>- Introducing social, cultural and environmental measures to better understand and advocate for the true value of responsible tourism growth.</li> </ul>
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3.17	<p><i>Strategic Theme 2: Position Belfast</i> (supported by a Positioning Review completed by Blue Sail Consulting).</p> <p>A critical dimension to any tourism development plan is understanding the market and how the brand operates in this space. In order to develop an effective strategy there also needs to be consideration of the brand architecture for the city and the region. The result should be clarity of roles and responsibilities for agencies working in this field including Council's own role and city partners such as Visit Belfast and Tourism NI. The ten year plan sets out a dynamic model for city positioning that strengthens Belfast's role as the gateway to the region in a way that responds to key markets including:</p> <ul style="list-style-type: none"> <li>- Business Tourism and sub-sectors within this group.</li> <li>- Leisure tourism target markets including - geographic considerations and the visitor journey.</li> </ul>
3.18	<p>This theme takes forward a new approach that pushes beyond traditional marketing methods towards enabling the people creating the Belfast experience to tell their story. Therefore, the approach is narrative driven and the new plan sets out areas of support on:</p> <ul style="list-style-type: none"> <li>- How do we tell Belfast stories? How do we enable people to tell their Belfast story?</li> <li>- How do we create an emotional connection with visitors?</li> <li>- How do we make local stories resonate internationally?</li> </ul>
3.19	<p>The theme brings forward actions that support an effective way of working and will be particularly dependent on successful establishment of governance and leadership support mechanisms that will be strengthened to support the overall delivery of the plan.</p>
3.20	<p><i>Strategic theme 3: Experience Belfast</i> (supported by Visitor Experience Framework developed with CHL Consulting)</p> <p>The plan provides a summary of key actions to strengthen the coherency of Belfast's overall visitor experience. The plan contains strategic priorities that:</p> <ul style="list-style-type: none"> <li>- 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</li> <li>- focuses on encouraging international visitors to immerse themselves actively in the locale, interacting with people, engaging the senses and learning the history and stories of the places.</li> <li>- prioritises delivering immersive moments that inspire tourists not only to share their experience with others but also make them want to return to the city.</li> </ul>

3.21	<p>This theme is critical to the overall success of the overall plan due to:</p> <ul style="list-style-type: none"> <li>- the role of Belfast City Council in developing the Belfast experience through the development of Council assets</li> <li>- Support for local initiatives and development plans through geographic or thematic based community development</li> </ul> <p>Therefore, a full Belfast Experience Framework has been developed to support implementation. This detailed Framework will be presented to Committee in January 2021 alongside a revised plan followed public consultation. It is proposed that engagement with Members of this Framework takes place through a dedicated workshop.</p>
3.22	<p>In developing this Framework, a number of pieces of foundational work have been completed including:</p> <ul style="list-style-type: none"> <li>- A mapping exercise which maps our existing tourism assets against the city's 'Belfast brand' and Tourism NI 'Embrace the Giant Spirit' brand.</li> <li>- Assessment of the quality, market fit and sustainability of existing products.</li> <li>- Development of a proposed combination of thematic and geographical clustering.</li> <li>- Undertaken a gap analysis of potential experience-based products. The gap analysis reviewed what was missing from the tourism offer taking into consideration issues such as seasonality, immersive experiences, events and festival animation, and opportunities to meet local people for instance.</li> <li>- Consideration of investment and evaluation criteria for longer term priorities and programmes of support incorporating social, environmental and economic factors.</li> </ul>
3.23	<p><i>Strategic theme 4: Sustain Belfast</i> (supported by benchmarking of Belfast as part of Global Destination Sustainability Index)</p> <p>This theme is shaped by recommendations emerging from the benchmarking completed as part of Global Destination Sustainability Index. Members will be aware that Belfast signed up to this benchmarking following Committee approval in August 2020. The Global Destination Sustainability Index is the world's leading benchmarking and performance Index for cities, their events and their visitor economy. Its purpose is to engage, enable and inspire cities to become more sustainable places to visit, meet and thrive in. In addition to benchmarking a city's environmental strategy and social sustainability performance, the GDS-Index assess criteria that are industry specific: industry supplier support (restaurants, hotels, conference centres) and convention bureau strategy and initiatives. Alongside benchmarking it helps destination management organisations, convention bureaus, key</p>

industry associations suppliers and clients to develop effective strategies and practices in support of sustainability goals.

3.24 Since 2019, over 60 cities have started the process of benchmarking and assessment. The goal is to have 300 cities collaborating by 2023. The Index is based on 69 Indicators broken down into four categories:

- City Environmental Performance
- City Social Performance
- Supplier Performance
- Destination Management Performance

3.25 Belfast has now completed benchmarking and a series of recommendations are included in the 10-year plan. A number of these relate to Visit Belfast's role as the Destination Management Organisation (DMO) and Visit Belfast have already made significant progress in implementing these as part of their current funding agreement with a commitment to build on this on a multi-annual basis. However, Council also has a direct role and recommendations within the plan include the establishment of a taskforce and a sustainability lab for tourism in Belfast. Further action is also set out in relation to the following areas:

Council assets

- Developing plans for Council's assets and supporting the ICC (as the city's Congress Venue) to achieve accreditation.
- Embed tourism in city emergency planning.

Supporting the supply chain

- Developing a tiered certification strategy for suppliers set targets for certification.
- Funding support to help / incentivise suppliers achieve 3<sup>rd</sup> part accreditation Sustainability training for suppliers.
- Training and capacity building to help suppliers create and implement their own sustainability policies.

3.26 **Catalyst Projects**

All four of these strategic themes are underpinned by the need to support inclusive economic growth and to differentiate the Belfast offer in an increasingly competitive global marketplace. A fifth strand to the plan considers key strategic opportunities that could



bolster investment in the sector in order to support recovery and future growth. These are catalyst or accelerator projects and are outlined below.

3.27 Catalyst Project 1: Our Place – support for local tourism

Adopting a place-based approach to the development of our neighbourhoods through local tourism investment that supports product development, jobs creation and destination management including the design and delivery of a Belfast Experience Development Fund to support product development. There are also opportunities to support capital development through alignment with existing programmes such as the Neighbourhood Regeneration Fund.

3.28 Catalyst 2: Make Yourself at Home

This is a renewed commitment to long-term initiatives contained in the cultural strategy including signature Belfast events, International Year of Culture and UNESCO City of Music. The global summit of One Young World has been secured for 2023. A plan will be developed to bid for other major events that support the ambitions set out in the plan. Members will be aware that Belfast had planned to host a year of culture in 2023 in line with the original European Capital of Culture bid. However, the ongoing impact of COVID-19 at a city level in terms of the capacity of our local sector to deliver something of this scale in 18 months and the trajectory for the full return of international markets increasing makes this challenging. Therefore, it is now proposed that a multi-annual approach is taken forward focussing initially on the period 2022-24. Building on the cultural strategy, we have positioned events as one of the catalyst programmes for tourism to help contribute to the city's long term growth (visitor numbers, dwell time, spend and brand positioning) and in particular act as a key motivator for GB and Ireland visitors as part of the next phase of recovery. Over this initial period this would include at least 2 flagship events each with a critical mass of homegrown activity in 2024. Consumer sentiment research is already indicating that Events will be a key differentiator for cities in terms of re-establishing market position post-COVID. It is proposed an update report on events is presented to Committee in November 2021 following the result of the UNESCO City of Music bid.

3.29 Catalyst Project 3: Our Stories

Delivering the Belfast Destination Hub as part of the tourism pillar of the Belfast Regional City Deal must be part of an overall integrated approach to tourism development and inclusive economic growth for the city. The Hub will connect to local tourism product development and infrastructure through a hub and spoke model. Importantly the Hub will

	<p>be an exemplar for responsible and sustainable tourism demonstrating the principles set out in the ten-year plan. Through the focus on Belfast Stories, the Hub will also be transformative for the positioning of the city. The development programme for the Hub as part of BRCD is fully aligned to this 10-year tourism plan with cross-cutting priorities and synergies.</p> <p><b>3.30 Next steps</b></p> <p>Subject to approval, the draft plan <i>Make Yourself at Home</i> included at Appendix 1 will be subject to a 12-week public consultation with a revised plan presented to CGR Committee in January 2022. It is proposed that a workshop for Members will take place during the public consultation phase.</p> <p><b>3.31</b> Significant engagement has already taken place with public sector stakeholders such as Visit Belfast, Tourism NI and Tourism Ireland as well as with the tourism industry. To build on this, a detailed consultation plan will be delivered optimising a number of consultation methods including online platforms, workshops (by sector and by theme) and surveys.</p> <p><b>3.32 <u>Financial &amp; Resource Implications</u></b></p> <p>There are currently no immediate financial implications to this report. The final plan will be supported by implementation programmes and a detailed finance and resource plan will be presented to Committee as part of the next phase of work.</p> <p><b>3.33 <u>Equality or Good Relations Implications/Rural Needs Assessment</u></b></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). A specific screening is being carried out on this plan that will be included as part of the consultation exercise and presented to Committee in January 2022. The Belfast Destination Hub will be subject to a separate Equality Impact Assessment. It is also anticipated that should any investment programmes emerge from this plan these will be subject to further equality screening.</p>
4.0	<b>Appendices – Documents attached</b>
	Appendix 1: Make Yourself at Home – Planning for the future of tourism