

visitBelfast

REBUILDING CITY TOURISM

Business & Operational Plan 2022-23 Year 2 of Three-Year Recovery Strategy

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1. INTRODUCTION & OVERVIEW

The impact of Covid-19 on the travel and tourism sectors both here and across the world has been well documented with various travel restrictions and lockdowns continuing to impact on restarts and recovery during the last two years.

Twenty years of tourism investment and growth saw our local tourism sector as a major contributor of a rejuvenated and increasingly confident and forward looking city economy, stopped in its tracks within a matter of months following what was a record year for tourism in 2019.

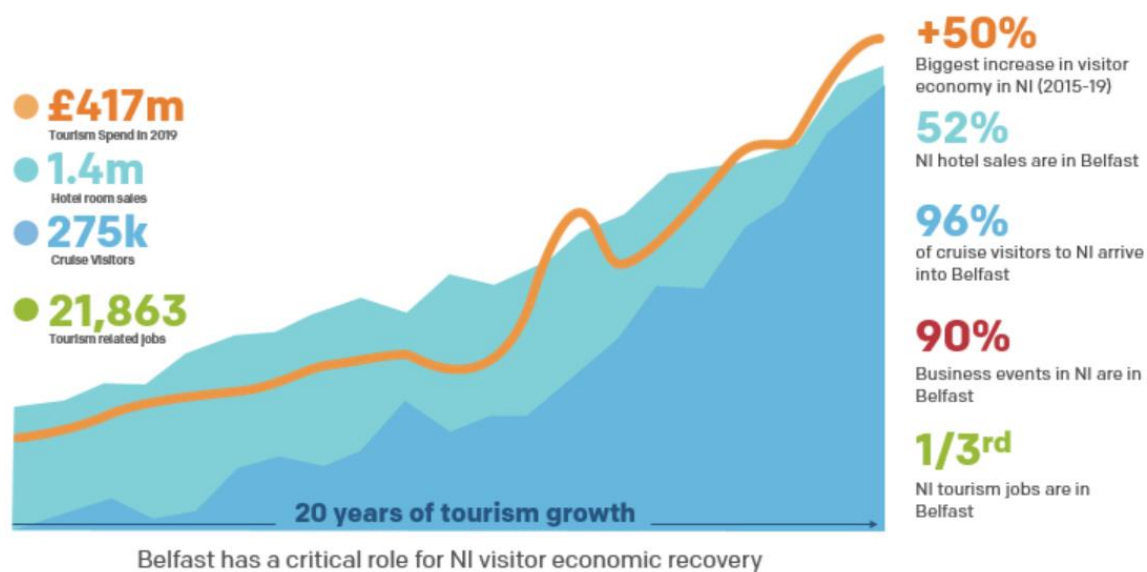
As with many other global destination organisations, the series of lockdowns created the opportunity for Visit Belfast to pause, re-evaluate and rethink how we influence sustainable tourism recovery and support the 500+ tourism businesses we represent. The development and implementation of our *Rebuilding City Tourism 2021-24* recovery strategy was the start of that process.

This is reflected in Visit Belfast's renewed purpose:

"To create and service visitors for Belfast and Northern Ireland in order to generate economic benefit and inclusive growth, creating jobs and prosperity for the city region, enabling Belfast to become a more sustainable place to visit, meet and live in."

Tourism Key to the City's Wellbeing

Multi-millions pound investment in the city's tourism infrastructure and offering, combined with concerted tourism marketing since the Millennium saw the growth in tourism revenue to Belfast outstrip any other part of the regional visitor economy. Tourism became a key catalyst for economic growth and regeneration in Belfast, establishing hundreds of new business enterprises, and with that, many thousands of job opportunities which have supported livelihoods across the city and region over the last twenty years.



As a key sector contributing to the city region's economy, rebuilding Belfast's tourism industry is critical to the city's overall economic recovery and societal well-being; and, as reflected in the chart

above, Belfast’s tourism recovery plays a strategically important role in contributing to the recovery efforts of the Northern Ireland’s visitor economy.

Rebuilding City Tourism 2021-24: Visit Belfast’s Three-Year Recovery Strategy

As the city’s official destination marketing/management organisation (DMO/DMMO), and as a not-for-profit public, private and community partnership, Visit Belfast will continue to work with Belfast City Council, Tourism NI, Tourism Ireland and our 500 private sector businesses, our strategic and corporate partners and local community partners in the delivery of integrated and effective city marketing, sales and visitor servicing activity aimed at rebuilding city tourism to pre-pandemic levels by 2024.

The Need to Build Back Better

Even before Covid-19, consumers, key decision makers and policy makers were already starting to take an increasingly critical look at tourism. Global research undertaken amongst 706 destinations from 52 countries in 2021, highlighted that the pandemic has accelerated the need for destination stewardship, community alignment and digital conversion in order to lay the foundations for building a stronger, more resilient tourism sector in the coming decades. The research identifying three transformational opportunities:

- **Destination Alignment:** aligning the public, private and civic sectors drives destination performance
- **Sustainable Development:** destination and product development should marry people, planet, profit and policy
- **Values Based Marketing:** a community’s values, goals and creative energy are the new competitive advantage

DestinationNEXT 2021 Futures Study

DestinationNEXT asserts that successful destinations need to see definitive advances in sustainability; equality, diversity and inclusion; and community building to make tourism more human and earn the respect of other leaders.

Visit Belfast’s *Rebuilding City Tourism 2021-24* Three-Year Recovery Strategy sets out a new direction of travel, demonstrating a step change in our approach to our marketing, sales and visitor servicing which significantly mirrors the transformational opportunities listed above by DestinationNEXT.

Visit Belfast: Next Generation DMMO



In tandem with city and regional development plans, Visit Belfast is adapting and adopting new and innovative approaches to its leisure and business destination sales, marketing and communications and visitor servicing activities to enhance competitiveness and to deliver growth, that will benefit residents, businesses and visitors equally and support our tourism partners' transition to more regenerative business models.

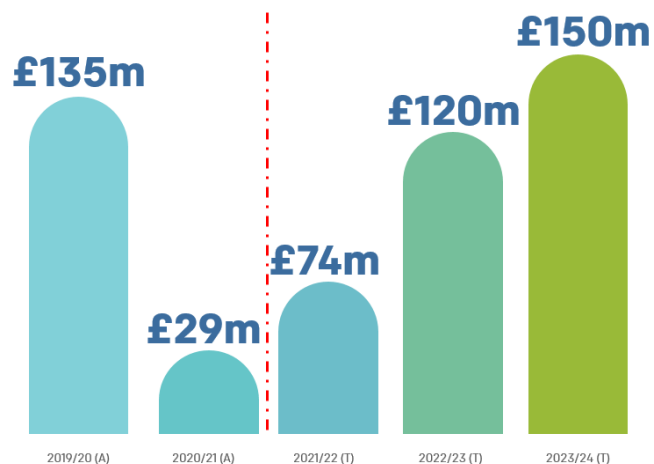
2021-22 represented the first year of that journey to:

- Build a more resilient and regenerative tourism model
- Stay ahead of the digital curve
- Support the low carbon transition
- Deliver value for and sustain local communities
- Reimagine the future of city tourism

Visit Belfast aims to return to pre-pandemic levels of economic output by 2024 by delivering a series of targeted demand generation projects across our leisure, business and visitor servicing activity; driving the programme for sustainable and transformational change; meeting changing visitor consumer behaviours and creating exciting and meaningful digital content.

Visit Belfast 3-Year Recovery Plan

- Demand Generation Projects
- Sustainability and transformational change
- Adapting to changing visitor behaviours and preferences
- Digitalisation



Year One Plan Update

While Visit Belfast's full-year results for 2021-22 are not yet confirmed, progress across identified change programmes has been positive with clear indicators of recovery as illustrated below.

Demand Generation

- 6 campaigns responsive to changing visitor behaviour / support city reopening
- Year-end hotel room occupancy 51% (above the forecasted 29%), with peak occupancy levels in July (73.3%) and August (79.2%)
- £1m enhanced conference support scheme launched with TNI, BCC, D&SDC & Visit Derry
- NI Ambassador Circle launched with TNI, Invest NI, QUB, UU & Visit Derry

Assurance

- Welcoming visitors safely back to Belfast: 185,000 enquiries between May and December
- Successful safe return of cruise in June: 72 ships safely welcomed
- 84% of industry partners retained
- 118 conferences booked between 2022 and 2029

Sustainable

- Visit Belfast achieved Green Tourism Bronze certification
- 63 partners recruited for Green Tourism Scheme to date - on track for 100+ businesses July 2022
- Belfast 19th (out of 73) in Global Destinations Sustainability Index 2021 - 5th most transformed destination in 2021
- Sustainable Business Events Framework launched
- 30% of 2022 business events have a sustainability plan in place

Digital

- Web traffic restored to pre-pandemic levels
- New VBWC interactive screen upgrade
- Migration to MS365 facilitating cloud computing and secure working



Sustainability: Building Back Better

Improving the city's sustainability credentials and promote Belfast as a responsible and sustainable tourism destination will be key to City's competitiveness post-pandemic. In a relatively short period of time, Belfast has moved forward on climate change, launching the city's first resilience strategy and climate plan in December 2020.

Working in partnership with Belfast City Council and industry, Visit Belfast adopted a proactive approach to support delivery and has made significant progress over the last 12 months.

An ambitious and evidence based sustainability action plan was implemented, informed by the 2020 Global Destination Sustainability (GDS) Index which assessed the City's performance across five areas: Environmental, Societal, Supplier/Industry and at a destination management level.

Key Progress and Outcomes 2021-22

- Visit Belfast Green Tourism certified business - bronze award secured
- Sustainability and Impact Manager appointed and Visit Belfast sustainability team established
- Visit Belfast Sustainability Policy developed and implemented (and procurement policy updated)
- 63 Belfast tourism businesses have joined the Green Tourism scheme, a ten-fold increase from the baseline figure of six businesses
- With Belfast City Council, Visit Belfast launched a citywide Green Tourism partnership scheme (June 2021), to educate, inform and recruit city tourism business to participate in the internationally recognised Green Tourism Award and independent certification
- 90% of the city's hotel stock on track to be certified in 2022, an increase from 5% in 2020 (this will position Belfast well above the GDS city average of 40%)
- ICC Belfast first Green Meetings certified venue on the island of Ireland, securing a silver award
- Belfast Zoo first visitor attraction in Belfast to receive a Green Tourism Award

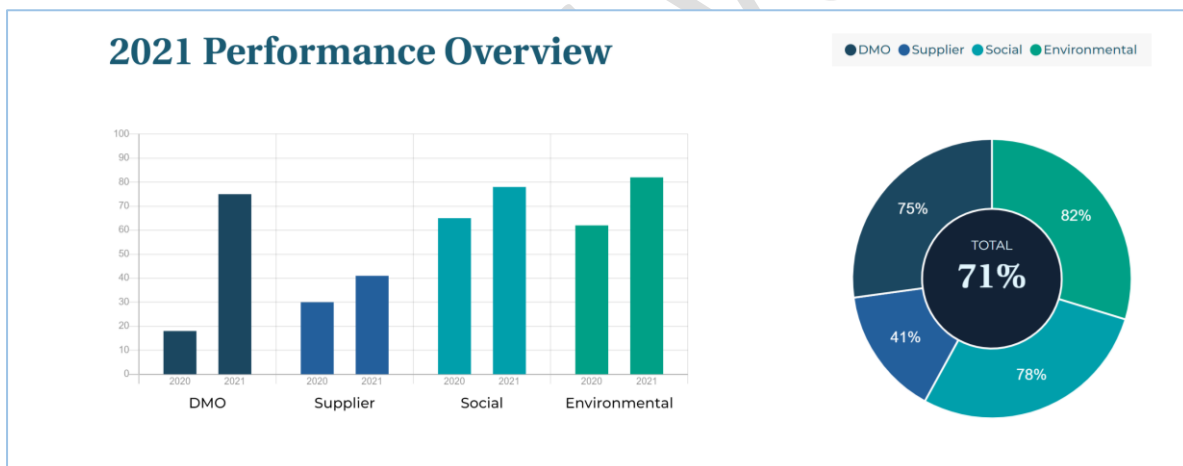
- A new sustainability events framework in development to include both inbound and local event organisers
- Visit Belfast is working across all tourism sectors and businesses on the development of individual and collective sustainability and impact plans

Becoming a Top 20 sustainable destination

The journey towards sustainability is attributable to the close collaboration between Visit Belfast, Belfast City Council and our industry partners and underpins the progress the city has made in the past year.

In October 2021, Belfast is now ranked in the top 20 sustainable destinations across 73 cities globally in the 2021 Global Destinations Sustainability Index securing a prominent place on the international stage as a leading city tourism destination committed to sustainable development and growth.

With a performance score of 70.7% in 2021 compared to 41.8% in 2020, Belfast made improvements in all areas with destination management (DMMO) performance representative of the significant work undertaken in the past 12 months as evidenced in the infographic below. In recognition of the progress made to date, Belfast was also shortlisted for the **most improved destination** award by GDS.



Visit Belfast’s commitment in driving tourism growth in a more sustainable way was also recognised by leading industry body the Association of British Professional Conference Organisers (ABPCO) in 2021, securing a **UK Excellence Award for Corporate Social Responsibility**. This award further enhances the destinations sustainability credentials and will be key to positioning the destination, post pandemic.

Securing a top 20 ranking with GDS is a powerful endorsement of the city’s sustainability credentials and commitment which will help to position Belfast as a responsible and regenerative destination which will be an imperative to deliver inclusive and sustainable growth across all segments.

2. TOURISM OUTLOOK, POLICY CONTEXT AND FOCUS

Tourism demand returns in 2021, but still a long way to go...

While estimates from the UN World Tourism Organisation recorded a nominal upturn in international tourist arrivals in 2021, a 4% increase on what was the worst year on record, meant 2021 international arrival were still 72% below those recorded in pre-pandemic 2019.

Lockdowns and international travel restrictions continued to impact on the operability and recovery of the aviation sector. According to ForwardKeys, world-wide inbound seat capacity was down 75% in 2021 compared to 2019 with the picture in Europe slightly better (-66%), largely buoyed by the brief late summer/autumn hiatus on travel restrictions which saw significant number dash southward to sunnier climes.

Research undertaken by European Cities Marketing further illustrated the slow, domestic/leisure led recovery across Europe's key city destinations in 2021:

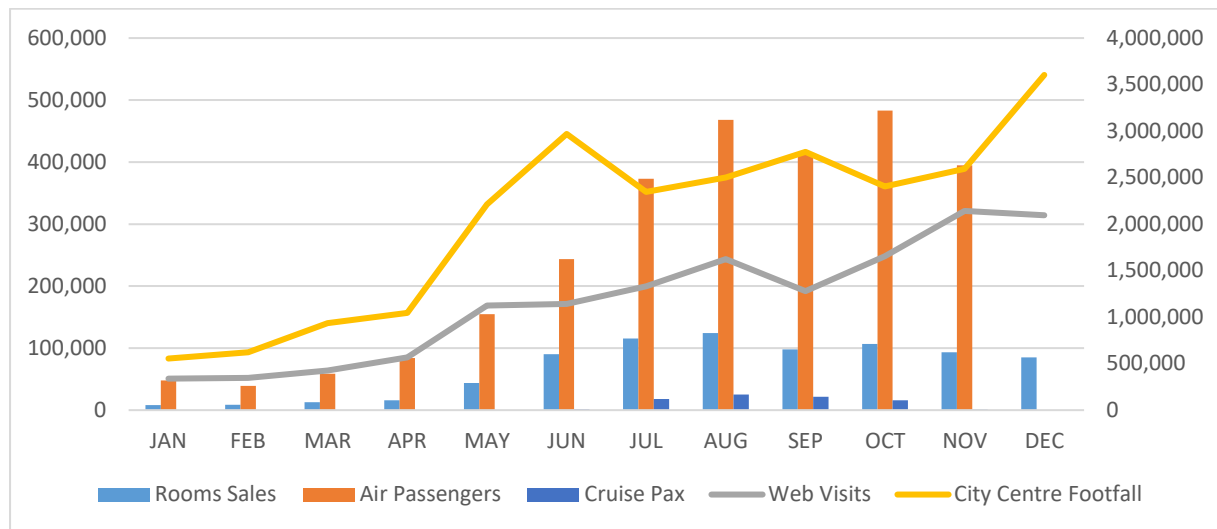
- Moderate recovery through 2021, however tourism levels a long way off 2019
- Recovery focussed on leisure tourism while other travel motivators more static
- The predominance of overnight visits by domestic or closer-to-home markets in comparison to out-of-state or longer-haul markets
- Significant need to reactivate the primary outbound leisure markets, including Great Britain, Germany, France and the USA and the crucial business tourism sector.
- 2024 represents the earliest year for effective recovery

What is clear is the pace of tourism recovery on a global scale remains slow, uneven and unpredictable.

Gathering tourism statistics is not without their challenges including the cost and timeliness of conducting research and Covid-19 has impacted on this area as with any other area of business operations. With a range of tourism related surveys including passenger and household travel surveys disrupted it remains unclear when we will see a return of annual government tourism statistics at both the national and local level.

An extensive range of research and analysis to fill the gap provide valuable metrics in the absence government volume and value tourism monitoring statistics, as illustrated in the following chart:

2021 Tourism Performance Indicators



Source: STR Global, CAA, Belfast One and Visit Belfast

Indications of Recovery

Trends that emerged from the Spring of 2021, following the lifting of restrictions that essentially closed the Northern Ireland hospitality and tourism sectors for a second and elongated period, have been more positive than some may have expected and provide much needed confidence for longer term and more meaningful tourism recovery.

The world-class competitiveness of the city region's product and experiences and collective marketing and sales efforts capitalised on the pent-up demand for travel, particularly from its key closer-to-home markets:

- A clear and immediate interest in finding out more about Belfast and what there is to see and do, with monthly web visits to visitbelfast.com exceeding 2019 levels since June and 190,000 enquiries handled by the visitor servicing team throughout 2021
- Hotel room occupancy exceeding 70% in the summer to near pre-pandemic levels thanks to strong interest from the Republic of Ireland and Great Britain – year end hotel room occupancy of 50% - 21 percentage points higher than forecasted earlier in the year
- 1 in 4 short breaks taken by ROI residents last summer were taken in Northern Ireland
- Resumption of conferences and events brought 19 in-person and hybrid conferences to Belfast from August to December
- A welcome return of cruise tourism with 72 cruise arrivals from June to November bringing over 55,000 passengers to Northern Ireland
- City centre footfall at 77% of 2019 levels

Additionally, Tourism NI and Tourism Ireland undertook quarterly sentiment analysis which provide valuable insights into our key visitor markets.

Optimism for 2022

The indicators above and the global picture for tourism recovery, clearly demonstrate that Belfast has the right balance to rebuild city tourism swiftly and efficiently. The Belfast City Region's attractiveness in its core closer-to-home markets of GB, ROI (as well as the return of international visitors as restrictions are lifted) and the ability to attract a mix of leisure tourism and business events will provide further impetus in the rebuilding of our tourism industry as illustrated:



Even though tourism is amongst the hardest hit economic sectors, the last year has accelerated some positive changes:

- Regional travel and staycation markets have delivered new visitors and indications are that this trend will continue with more UK and Ireland people eager to travel to nearby regions;
- People have re-discovered wellbeing, nature and the great outdoors and Belfast is uniquely seen as an urban escape and gateway city region;
- Family trips have been on the increase with family bubble groups seeking out new experiences – opening up strengthening marketing opportunities for Belfast City Region;
- Conscious travel is on the rise; and Belfast achieved a ranking in the top 20 sustainable destinations among 73 cities – showing our commitment to sustainable development and growth;

While the resumption of travel has seen a cautious but steady restart, there is positive evidence of growing levels of consumer confidence and comfort in taking holidays and short breaks to the island of Ireland. Tourism Ireland's Sentiment Tracker (October 2021) reported a third anticipated taking a holiday by June, rising to seven in ten by the end of 2022 and the latest sentiment updated from the European Travel Commission reports that overall travel-related sentiment remains positive globally and has begun to rise again in most regions.

The priorities within the Northern Ireland Tourism Recovery Action Plan set the ambition to restore tourism levels in Northern Ireland to 80% of pre-pandemic levels by the end of 2022 and see full recovery by the end of 2024. With Belfast historically the engine room of the Northern Ireland tourism economy generating a third of the Region's overnight trips and 40% of tourism spend, the city will play a key role in rebuilding tourism here.

Pre-pandemic, Visit Belfast's largest visitor markets derived from Great Britain and Ireland, with significantly less reliance on international markets compared to other UK and Ireland destinations. As we work to restore our tourism economy, these markets remain best prospects for Belfast. The strong hotel occupancy driven mainly by the ROI market which saw spend increase by 150% (Tourism NI) and to a lesser degree, a return on demand from the ever important GB market was evident last summer. With that success, the ROI market in particular represents a significant opportunity to drive tourism growth as identified in the recent Republic of Ireland Market Strategy 2021-2026. The challenge however will be as international borders reopen and travel restrictions lift elsewhere there clearly will be an element of pent up demand to return to European and international travel.

With new and refreshed product offering, we have the opportunity to encourage leisure visitors to come and experience what is on their doorstep. Belfast also has the added ability to satisfy the demand for overnight staycations, Visiting Friends & Relatives (VFR) and repeat visits to a known and familiar destination.

Overseas international markets remain a vital source for the city's longer-term tourism growth and something which Visit Belfast will not lose sight of as we continue to promote Belfast as an attractive and safe 'local and international' destination, keeping the brand alive in the minds of audiences at home and abroad and positioning Belfast well in converting interest into actual visits. Whilst Visit Britain estimates inbound visits to the UK in 2022 to return to around 59% of pre-pandemic levels there is further optimism in the air with the lifting of travel restrictions in to the Republic of Ireland just at the time when many overseas markets are planning their summer holidays.

Business events and conferences, one of the last sectors of the tourism industry to have its restrictions lifted, saw the welcome return to the city of in-person conferencing towards the end of the year. While technology has allowed the sector to continue with virtual and hybrid conferencing, video fatigue and the interpersonal peer-to-peer information exchanges sought in conferences will restore the levels of conference delegates attending. Business events are crucial in generating mid-week, year-round demand to our venues, hotels and hospitality sector; and as they have the unique ability and power to showcase world-leading skills, knowledge and innovation that exist in Northern Ireland, they play a strategic role in putting the region on the map as an exciting place to visit, do business and invest in.

Policy Framework

The strategies illustrated below have informed and will continue to influence Visit Belfast's plans as it support the rebuilding of city tourism over the lifespan of the three-year recovery plan:

Policy Framework



Belfast City Council's *Make Yourself at Home* sets out an ambitious vision for the future of tourism in the city. Visit Belfast is committed to supporting the challenge of building on the sector's successes to date, ensuring tourism growth is people-centred, responsible and sustainable. As the city's DMO, Visit Belfast will play an integral part in the delivery of its four strategic themes:

Growing Belfast: the City's role in tourism recovery and potential requirements for future growth.

Experiencing Belfast: an interpretative development framework for tourism that will provide an optimal mix of anchor and ancillary products, immersive activity and inspirational experiences.

Positioning Belfast: Brand positioning and architecture, and organisational delivery roles and responsibilities.

Sustaining Belfast: Global Destination Sustainability Index and benchmarking, development of a collaborative action plan to improve the sustainability performance and enabling Belfast to become a more sustainable place to visit, meet and live in.

It is vital that Visit Belfast's city break, day trip, retail and leisure marketing, business events and travel trade sales and its visitor servicing is developed in a co-ordinated and strategic way, maximising the economic benefit that city tourism can deliver to both city businesses and neighbourhood communities; and also support Belfast City Council's cultural tourism, community tourism and sustainable tourism development plans.

Whilst the Northern Ireland Business Tourism Integrated Strategy has yet to be rolled out, the extensive work behind it has provided innovative and collaborative solution that can deliver not just for the visitor economy but across multiple policy areas; namely economy, research and higher education and will be a key contributor to the successful delivery of the 10X Economy Strategy and Northern Ireland's Tourism Recovery Action Plan. Attracting strategic business events to Northern Ireland aligned to 10X clusters is a powerful way to showcase the world-leading skills, knowledge and innovation that exist here, promoting the region as an exciting place to visit, work, study, do business and invest.

Operating Environment

Visit Belfast plans aim to maximise efficiencies and prioritise resources in a highly fluid operating environment and it is important that Visit Belfast remains cognisant of a number of environmental factors/influences when rolling out its plans, these include:



Visit Belfast 2022-23 Focus

Visit Belfast's focus is to help businesses recover from the impact of the pandemic, whilst contributing to the city's agenda to create a healthy, sustainable, inclusive and growing economy through driving visitor number and visitor spend.

Scale of Ambition

Visit Belfast aims to rebuild city tourism to 2019 levels by 2024 and set targets that are in line with City and National ambition of doubling tourism revenue by 2030.

Grow

Visit Belfast's marketing, sales and visitor servicing activity will deliver on city wide and national strategies by driving short break, conference and cruise tourism and enhancing city and region brand synergies. The plans will focus on the NI Business Tourism Strategy's aim of collaboration across tourism, education and economic development.

Sustain

Visit Belfast's plans will accelerate the transition to a regenerative tourism model, evidencing the positive impact of tourism in the community and environment.

Position Belfast

Visit Belfast will strengthen Belfast's position in national and international leisure and business tourism markets by integrating and incorporating culture, events and stories and embracing Belfast's gateway role to rest of Northern Ireland and facilitate better visitor and data analysis.

Enhancing the Experience

Visit Belfast's activity will support city and community tourism and create opportunities that connect iconic visitor attractions with neighbourhood initiatives.

Impact

Visit Belfast's 2022-23 Business Plan and Operational Plan will be the second year of the three-year recovery plan. With a proposed budget of £3.6m, Visit Belfast marketing, sales and visitor servicing activity aims to deliver:

- 232,000 bed nights (leisure and business)
- 345,000 cruise visitors
- 516,000 visitor enquiries
- £97m in economic benefit, which equates to a return on investment of £27 to every £1 spent

3. OPERATIONAL PLANS 2022-23

3.1 SUSTAINABILITY AND IMPACT

The sustainability and impact agenda continues to define and reshape the future recovery and growth of tourism and business events.

To accelerate its journey towards a regenerative tourism model, Visit Belfast's three year plan *Rebuilding City Tourism 2021-24* set out a new direction of travel that would put sustainability at the heart of the organisation and its destination recovery. From a standstill position, Visit Belfast has embedded sustainability across all of its business operations.

As part of the organisation-wide sustainability plans, significant progress has been made as outlined in Chapter 1.

Phase Two: Priorities for 2022-23

Securing a top 20 ranking with GDS was a powerful endorsement of the city's sustainability credentials and commitment which will position Belfast as a responsible and sustainable tourism and business events destinations. Building on the foundation work in 2020-21, key priorities for 2022-23 will include:

- Improving Visit Belfast's Green Tourism accreditation from Bronze to Silver
- Maintaining Belfast's top 20 ranking in GDS Index for 2022 which will require further improvement in scores, particularly in the supplier/industry section
- Achieve 90% of hotel partners Green Tourism certified and further promotion of the Green Tourism scheme to maximize industry recruitment
- Development of an impact measurement strategy and plan to measure wider KPIs and benefits of tourism beyond visitor numbers and spend, including social, environmental and wider economic impacts of tourism (economic development, research etc.)
- Working with event organisers, pilot the development of sustainability and impact plans for 2022 events

Visit Belfast will focus on further embedding sustainability across our visitor touchpoints in visitor servicing, business tourism, travel trade, cruise and consumer segments to increase the handprint, and reduce the footprint of tourism in the city. Development areas will include:

- An enhanced volunteering scheme
- Exploring fundraising and round-up schemes for local charities and projects
- Development of CSR, volunteering, social and environmental projects and partnerships for inbound conferences
- Love local promotion – focus on supporting and champion local communities, social enterprises, local talent across all segments
- Exploring carbon measurement and reduction schemes as well as offsetting initiatives
- Development of food waste reduction/food donation schemes with industry and Belfast City Council
- Inclusivity and diversity plan for Visit Belfast
- Continued development of legacy and impact plans for business events

- Development of Cruise sustainability plan in partnership with Belfast Harbour
- Implementation of online and F2F surveys to establish sustainability choices of visitors e.g.
 - % of visitors that make a sustainable choice
 - % of visitors that use active or soft mobility travel
 - % of visitors and delegates that offset their trip

Contribute towards Belfast and Northern Ireland regenerative tourism and climate adaption plans

- Work with Belfast City Council to establish the Belfast Resilience and Sustainability Board Tourism taskforce to contribute towards the 10 Year Belfast Tourism Plan city plans under the 'Sustain' theme
- Present industry contribution toward net zero city aspiration and support city-wide initiatives
- Support Tourism NI national regenerative tourism strategy and plans

3.2 MARKETING, COMMUNICATIONS, PARTNERSHIP AND COMMERCIAL

3.2.1 Marketing & Communications Plans

Visit Belfast's Marketing Approach

Visit Belfast's range of promotional activity aims to support the national recovery ambitions, restore city tourism to pre-pandemic levels across all our key markets and contribute to the reimagining of city tourism by driving regeneration and inclusive growth.

Immediate recovery plans will focus on near source markets in an effort to recover domestic overnight trips and spend by the end of 2022-23, with focus expanding to further afield markets to recover inbound visitors and spend by the end of 2023-24.

We will deliver a range of integrated marketing and communications activity to lever demand from the Republic of Ireland market which has shown a latent readiness to visit and spend, and to tap into the 20% of Great Britain travellers actively considering a short break to the island of Ireland in the next 12 months; and continue to work closely with Tourism NI and Tourism Ireland across all our activity, and inform and adjust our planned marketing and communications activity in line with national tourism organisations strategies and plans.

Visit Belfast's marketing and communications will embrace Belfast City Council's cultural strategy vision within *A City Imagining* and its *Make Yourself at Home* Tourism Strategy (currently out to consultation) to provide compelling selling propositions and promotion of unique Belfast experiences that set us apart from other destinations and will inform and shape our marketing approach.

By harnessing the creative potential of our city's cultural sector we will build a momentum towards a year-long celebration of culture in 2024. The narrative and themes in *A City Imagining* provide the vision for interpretation and visitor experience in Belfast, allowing us to position the city as an 'experience stage' for visitors that will underpin our marketing and communications.

Additionally, we will inspire visitors to '*love local*' by amplifying the local experiences and stories unique to Belfast, supporting the development of neighbourhood tourism, driving community transformation which will add fresh destination appeal and contribute to tourism recovery.

Marketing Communication Touchpoints and Themes 2022-23

Themes collectively and individually provide a compass for marketing and communication of Belfast and its stories. Together, they provide inspiration and engagement that attracts attention and encourages visitors to discover more, differentiating and enabling the promotion of the city region as a cultural destination of distinction. Additionally, they strengthen Belfast's international positioning by championing and nurturing the city's unique selling points and authentic visitor experiences.

Touch Points and Themes



Maritime Powerhouse: Titanic history, iconic waterfront and Maritime Mile

Belfast's waterways, rivers, loughs and shores have shaped the culture and character of the City Region. The Titanic story and our maritime history has established the city as must-visit destination, with the 10th year anniversary of Titanic Belfast in 2022 and a growing portfolio of products, the area has become an anchor experience. Visit Belfast will continue to work with Maritime Belfast Trust, Titanic Belfast Limited, and Belfast Harbour as well as extending out to our RTP partners to promote this key theme.

A City Reimagining: culture, art and UNESCO city of music

Belfast has a rich history and a vibrant contemporary culture. Our plans recognise the creative potential of our city and the importance of building momentum towards a year-long celebration of culture in 2024. Communications messaging will reflect this through promotion of the city's arts, music, literary and theatre scenes, as well as promoting historical visitor attractions and tours.

Food and Drink: uniquely local, restaurants, markets, distilleries and tastings

Belfast and Northern Ireland are renowned for their strong food offering from 'farm to fork'. From Michelin-starred restaurants, Victorian markets and food and drinks tours, Belfast has an extensive choice of food experiences and stories to tell and recovery through the promotion of Belfast's vibrant food and drink experiences and food and drink scene. Visit Belfast will continue to market and promote our bars, restaurants and food experiences as an essential part of any visit.

Homespun Pioneers: local people, culture and curated stories

Every city has its stories, but none quite like Belfast. In line with Belfast City Council's Cultural Strategy and draft Tourism Plan, Visit Belfast's marketing communications messaging will reflect the unique character of Belfast's people, culture, arts and history, showcasing authentic experiences to stimulate interest in the destination. This will include early messaging about the new Belfast Stories visitor attraction as plans are developed.

LGBTQI+

Reflecting the diversity of Belfast as a city, Visit Belfast will promote attractions, events and activities for the LGBTQI+ community, supporting the Belfast Agenda vision of a city that is "welcoming, safe, fair and inclusive for all", and supporting events that are accessible, diverse and inclusive.

Events and Festivals: cultural milestones to international events in 2024

Our Space in Place and wider Festival UK 2022 programme and the UNESCO City of Music Initiatives, as well as the annual events and festival programme provide key opportunities for re-stimulating tourism demand. The City's events and festivals will continue to be promoted by Visit Belfast across all our media channels and communications.

Natural Gateway to City Region: seascapes, hills and landscape

Belfast has always been a gateway and we will utilise this positioning to establish the city as base from which to explore Northern Ireland. Trends suggest that access to outdoor and green spaces are increasingly important in a post-Covid environment. Promoting Belfast City Region as an accessible, green destination with an array of attractions and experiences, will provide the impetus to stay longer, do more and motivate return visits.

City Plus: activities, experiences, family adventures and outdoor and nature

Visit Belfast will work with its regional tourism partners to augment and extend the city break experience beyond the city. We will promote the range of family friendly and outdoor attractions and experiences available across the Belfast City Region, providing additional stand-out and more reasons to visit.

Health and Wellness: retreats, remedies and spa experiences

Wellness tourism is a growing industry for post-pandemic visitors seeking out health and wellbeing to enhance their physical and mental resilience from meditation and yoga, spa and relaxation to spiritual and physical exercise. Messaging will promote this emerging sector in Belfast and Northern Ireland and will develop itineraries and packages supporting this theme.

Belfast Brand/Embrace a Giant Spirit

City branding enables cities to be competitive and own a positioning and narrative that expresses what makes the city destination unique and special.

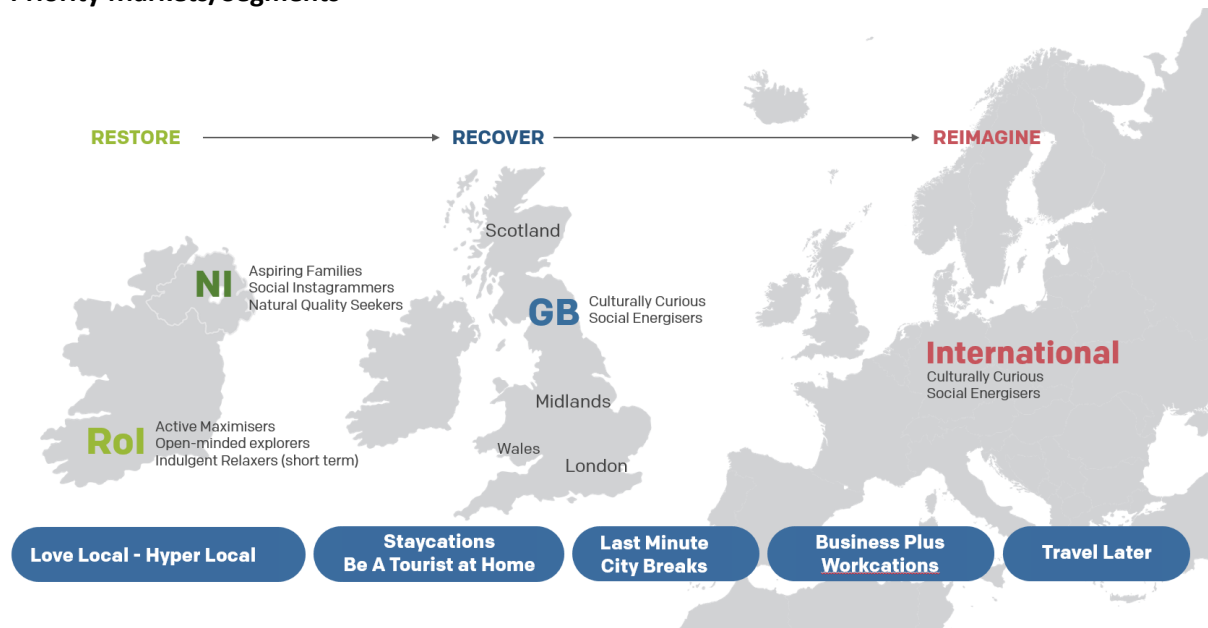
The Belfast 'Starburst' is the city's visual identity for projecting the positive, distinguishing associations and symbolises the city's renewed energy. 'Starburst' is a shape that takes its inspiration from a satellite view of Belfast, complete with arms radiating into North, South, East and West neighbourhoods. The city brand enables Belfast to compete on a global stage for visitors, investment, students and talent and locally for its citizens. Since its launch Visit Belfast has been actively incorporating the city brand in its destination marketing campaigns and communications informed by the brand tourism narrative which has been developed out of the agreed cultural strategy. While Covid-19 has impacted on the approach to city marketing, the attributes and core values of the brand have remained strong.

Tourism Northern Ireland's *Embrace a Giant Spirit* experience brand has been enormously successful and continues to build equity in domestic and out-of-state markets, positively positioning Northern Ireland as an exciting and vibrant holiday and short break destination.

Visit Belfast is committed to utilising the EAGS brand as part of its city marketing and integrating its attributes to strengthen the City's tourism brand, and in doing so maximising the promotion of city region and its tourism products and experiences.

Strategic alignment of the Belfast city brand and EAGS experience brand has resulted in the development of brand guidelines for use across our marketing and campaign activity.

Priority Markets/Segments



Consumers are clearly eager to make holiday plans as visitor markets emerge from travel restrictions. Evidenced by the strong performance in hotel bookings from the ROI and GB markets last summer and autumn, Belfast’s appeal as a city break destination appears as strong as ever and prioritisation will be given to these and the domestic market to maximise city tourism recovery.

Belfast is well positioned to **restore** visitors from domestic and ROI markets and **recover** visitors from the GB market through tactical and targeted campaign activity. With the return of international travellers forecast to be slower, with pre-pandemic volumes not expected to return before 2024 (European Travel Council, Q3/2021), we will **reimagine** travel to Belfast from these further afield markets through enhanced digital strategies.

Domestic Northern Ireland

Tourism NI’s Domestic Tourism Strategy highlights the importance of the domestic market to the regional visitor economy. The strategy identifies the domestic segments that have the greatest potential in terms of scale, value and propensity, prioritising the following segments: Aspiring Families, Social Instagrammers and Natural Quality Seekers. These three combined, represent 60% of the market and ranked the highest in terms of estimated spend. Looking to 2030, domestic market growth would result in an overall increase of 24% in trips and 31% in spend (versus 2019 levels).

Visit Belfast recognises the importance of the local market to support our tourism partner businesses and the city centre’s retail offering and will continue to align its marketing and campaign activity to target the NI segments mentioned above. Visit Belfast has a strong and well-established partnership approach to marketing the city, delivering high profile seasonal campaigns, including Christmas, together with other tactical city marketing and promotion. Working with Belfast City Council and Tourism NI, we will coordinate a joined-up approach to domestic city marketing in order to stimulate day visits and overnights to Belfast.

Republic of Ireland

Tourism NI’s Republic of Ireland Market Strategy 2021-26 provides a deeper understanding of the key dynamics of the ROI market, barriers to visiting and opportunities for growth, setting out ambitious targets to achieve 10% value share of ROI trips on the island of Ireland.

Belfast has enjoyed significant success from the ROI market, in particular from the Greater Dublin area and North-South corridor. Online review and credit card spending analysis by Tourism NI has largely corroborated the anecdotal feedback Visit Belfast has gathered which saw a significant increase in the number of visitors travelling North from the Republic and Visit Belfast marketing plans will focus on the *Active Maximiser* and *Open-Minded Explorer* segments (33% and 15% of the market respectively) in the short, medium and long term. In addition, we will target the Indulgent Relaxers segment (11%), which has been identified as one of the most lucrative segment to drive short term tourism growth from ROI.

Visit Belfast will deliver consistent, connected and motivating marketing and communications designed to build knowledge of what Belfast has to offer and provide clear and compelling reasons to visit. Promoting short-break propositions that highlight unique attractions and offerings, events and festivals and providing easy booking options will be key to unlocking the potential of this important market for Belfast.

Great Britain

GB would be Belfast's most important market in terms of tourists and bed nights, generating 41% of overnight trips to the city in 2019. As the World's 4th largest outbound market, British tourists typically taking in the region of 93m trips annually, and continue to provide huge potential in sustaining and growing the city's visitor economy. With consumers still tentative about foreign travel in 2022, the opportunity to encourage 'staycations' from this market is further strengthened.

Tourism Ireland's Sentiment Tracker (October 2021) estimated that 71% of GB respondents expect to take a holiday or short break by the end of 2022. With a combined market size of 7.1m visitors, the Culturally Curious and Social Energisers provide the best prospects for Belfast and overall, this market remains hugely attractive for the following reasons:

- British holiday makers are the most likely to visit during the off-peak months – in 2019, 41% arrived between October and March
- Almost 4 in ten plan their trip two or three months in advance

Visit Belfast will seek to strongly position Belfast as a city break and gateway destination, promoting staycations with authentic experiences, local culture and history, world-class attractions and a programme of year-round events as reasons to visit from GB.

Air and Sea Access Key to Optimising Recovery from the GB market

Air

Following a hugely turbulent two years for the aviation industry that initially saw the demise of Flybe and the almost virtual grounding of domestic and international air travel due to Covid-19 pandemic, there are clear signs of recovery for inter-UK aviation, so important for tourism and economic recovery.

Inbound services from GB to both Belfast airports have continued to improve with most services back up and running; and although frequency and capacity of these services may not be back to 2019 levels (according to OAG, February 2022 seat capacity -27% on Feb 2019), the recent announcement that Emerald Airlines will set up a base here to operate Aer Lingus Regional services provides further optimism for summer 2022. Below are indicative inbound seat number for summer 2022 compared to the previous 3 years.

Inbound Air Seat Capacity



Airport	SS 2019	SS 2020	SS 2021	SS2022	% Diff 2022 v 2019
GBBCA	933,090	150,040	423,630	601,542	-35.5%
BIA	1,399,407	379,393	904,948	1,382,077	-1.2%
Total Belfast	2,332,497	529,433	1,328,578	1,983,619	-14.9%

Sea

The short sea connection between Great Britain and Northern Ireland continues to be a popular alternative to flying. There is no doubt that the series of travel restrictions imposed across the common travel area impacted on sea passenger numbers in to Northern Ireland. However, differing travel restrictions into the Republic of Ireland and on-going trade issues resulting from the Northern Ireland Protocol provided the opportunity for increasing capacity by 15% on the Northern Corridor, compared to 2019. This was due to differing travel restrictions relating to CTA and issues around Brexit. As Irish Sea trade adapts to the changing regulations, ferry capacity will likely revert back to 2019 levels.

Visit Belfast will work with Tourism Ireland and air and sea carriers to develop partnership campaign activity supporting direct access routes to Belfast.

International Markets

Out of the 5.3m overnight trips taken in Northern Ireland in 2019, just over 783,000 were made by visitors from outside the UK and Ireland. Generating 4.3m bed nights and £220m spend they also tended to stay longer and spend more (on average 5.4 nights and £280.77 spend per trip compared to 3.9 nights and £252.50 by GB visitors and 2.4 nights and £187.53 by ROI visitors). While comparable data is not available at the local government level, just over a quarter of Belfast's out-of-state visits emanated from Europe or North America (roughly 15% and 12% respectively, based on a three-year average 2017-19).

Pre-pandemic, Europe would have been the largest single source of holidaymakers to the island of Ireland delivering a third of all overseas tourism revenue. Germany and France were the two largest markets to Northern Ireland, and likely Belfast, with a 36% of European; and as the key gateway city, Belfast had also been seeing strong visitor trends particularly from Spain, the Netherlands, Italy and the Nordic countries via direct flights to Belfast as well as from Dublin.

Although the past two years of changing Covid 19 restrictions and complex requirements for travel have presented enormous barriers for inbound international travel to the UK, Tourism Ireland research suggests that Europeans, as close markets to the Island of Ireland, are keen to travel again (nearly 1 in 8 Germans and 1 in 7 French expect to travel by the end of 2022). As soon as they are able, and we know there is considerable pent up demand and deferred holidays in these key international markets, we want to ensure Belfast is at forefront of mind when making their travel choices.

Tourism Ireland market research indicates that culturally curious visitors have put the Island of Ireland close to the top of their consideration set for future international travel and that they will be looking for open spaces, land-and-seascapes, authentic experiences and getting away from it all which Belfast and city region can offer in abundance.

This provides an opportunity for us to convert interest to bookings when the time is right, through highly targeted digital activity working with Tourism Ireland, supporting in-market media events and by providing communications content and new experiences that can create a ‘buzz’ at key planning and booking times.

We’ll also be working with intermediary partners to ensure they are sharing our key messages about Belfast supported by new photography and videography to ensure that Belfast appears for people that are searching holidays – this will include working with Online Travel Agent - Expedia in North America and Europe.

This will all be underpinned by our ongoing activity through our owned channels – social, email and website, as well as earned activity through influencers, PR and intermediary partners.

Visit Belfast’s marketing plans will focus on:

- Promoting Belfast through authentic urban and gateway experiences to encourage visitors to stay longer, grow shoulder season and fill low periods of occupancy
- Delivering responsible marketing and communications plans built on core principles of developing sustainable, inclusive and accessible tourism
- Repositioning Belfast in fiercely competitive re-emerging markets, utilising the strength of Belfast anchor attractions and highlighting lesser known and/or new experiences
- Utilising UNESCO City of Music designation and planned events programme to 2024
- Collaborative marketing and communications working with partners to develop an industry committed to supporting and protecting our cultural, historical and natural heritage
- Digital and mobile first communications, maximising innovative digital technology and data analysis to enhance communications, visitor journey and in city experience
- Showcasing the city’s cultural events offering in a consistent and exciting way, increasing appreciation and engagement
- Supporting the marketing of Belfast as a leading destination for hosting business events and support return to pre-pandemic levels
- Activating responsive demand-led marketing that drives inclusive growth
- Recover domestic overnight trips and spend by the end of 2022-23; and inbound visitors and spend by the end of 2023-24

Marketing and Campaigns

Visit Belfast’s marketing and campaign plans remain an integral part of the staged recovery of Belfast and NI tourism and aim to rebuild our tourism economy from its identified key markets and segments in a sustainable and inclusive way.

Visit Belfast will deliver an integrated approach to marketing activity designed to support the restoration, recovery and re-imagination of our city and tourism industry in line with Belfast City Council’s four strategic areas (Grow, Position, Experience and Sustain) as set out in the draft Tourism Strategy *Make Yourself at Home*. These provide a framework for the marketing of Belfast and a focus for our campaign plans.

Campaigns will support tourism and cultural strategies, utilising thematic marketing, city branding and positioning. Plans will be responsive and agile and we will deliver smart, simple and tactical activity with the flexibility to adapt, should the travel situation require.

We are committed to working with our industry partners, Belfast City Council, Tourism NI & Tourism Ireland. Our combined and integrated marketing efforts will increase engagement and participation by promoting and showcasing the city’s tourism and cultural experiences in new and exciting ways.

A series of campaigns and continuous marketing activity will be developed in line with progression through identified stages, this will include the following:

- Integrated, co-ordinated marketing activity shaped around key touchpoints and themes
- Seasonally inspired activity focused on day and overnights from the domestic, ROI and GB markets
- Content and messaging positioning Belfast as a gateway city and promoting the diversity and uniqueness of experiences on offer across the city region
- Strengthened digital channel activity utilising new tourism experiences to provide inspiration to visit now and to motivate future visits from key direct access European Cities
- Supporting PR and communications activity that deliver destination messages, tell the people, culture and place stories and connect with priority geographic audiences

	RESTORE	RECOVER	REIMAGINE
Key Messages	Belfast Uncovered City Faces, City Places There’s Only Belfast We’re Ready: Are You?	Culture Every Day The Rhythm of Belfast There’s Only Belfast Great Belfast Escape	Great Faces: Great Places The Rhythm of Belfast Find Your Belfast Every Day is Different
Activity	Integrated Digital, PR and ATL media- Content development prioritised Seasonal campaign activity, demand – led targeted destination marketing driving day and overnight trips <ul style="list-style-type: none"> • NI/ROI for staycations and repeat visits • GB direct access short breaks Upweighted Digital and PR / Comms - inspiring messaging, confidence building and providing strong reasons to visit Belfast,: Food and festivals, Music City, Titanic and Gateway city, Love Local	Strengthened communications and advertising, widening and intensified market presence Strengthened positioning and destination sell, creative integrated tactical campaign approach to drive bookings - GB and ROI focus Developing commercial partnership with industry partners, Providing TI and TNI with new content and illustration/imagery Development of themed campaign creative, market specific Intensified international promotion	Positioning of Belfast as a cultural tourism destination with focus on music, culture and Belfast Stories. Deliver omni-channel segmented targeted marketing – positioning a new cultural destination of distinction Confounding audiences and stimulating demand for new authentic experiences, Destination of Choice for the eco-traveller Belfast Now content promoting a culturally vibrant city - Belfast Themed, trusted content communication, stories untold - visitors, industry partners and media influencers PR / Media showcases in key city destinations (TI partner)
Channels	<ul style="list-style-type: none"> • Radio • OOH • Website & Email • Digital organic &paid • All social media channels • Press & Advertorials • PR activity 	<ul style="list-style-type: none"> • Website & Email • Digital paid • All social media channels • Radio • OOH • Digital Video/VOD • Supporting in market PR - events 	<ul style="list-style-type: none"> • Social media organic & paid • Digital video – themed • OOH • Radio • VOD • Targeted programmatic digital display
Audience	<ul style="list-style-type: none"> • All NI, key segments • ROI priority segments • GB culturally Curious 	<ul style="list-style-type: none"> • Increased activity in GB market and inbound partnership with carrier activity from GB. Comms activity in targeted European direct access cities. 	<ul style="list-style-type: none"> • Island of Ireland and GB markets • Focus on GB inbound carrier activity • Extend focus to Europe in bound

Digital Trends and Insights

Digital activity is an important aspect of Visit Belfast’s overall marketing, communication and visitor engagement. By adopting a digital first approach to our marketing content and advertisements we aim to effectively communicate to a range of audiences which is constantly monitored and measured to optimise results. Keeping abreast of the latest digital innovation is also crucial in remaining at the forefront of changing consumer behaviours and consumption on digital platforms by allowing us to best align our marketing activity to meet our business needs.

Search is the language of demand and Google Search insight help us create, shape and lever our digital content online to meet potential visitor interests and motivations. The World/UK Google Search Data report (2021) provides year-on-year insights into consumers' changing priorities and cultural interests – trends include:

- 700% increase in search interest for 'outdoor seating' restaurants in the UK
- 45% increase in search interest for 'Zoo tickets' in the UK
- 40% increase in global searches containing 'live music near me'
- 100% increase in global searches for 'getaways near me'

Research from Google and Kantar highlight visiting friends and family as a primary and current motivator for travel. Tourism academic Fabio Carbone, further highlights that tourist are motivated to travel for people-experiences more than just the destination. Visit Belfast's digital communications and content plans will address this market shift across our various platforms and channels to include telling the Belfast stories through its people and place, emphasising human connections, and promoting 'love local' experiences.

Intent to travel domestically continues to rise, with a 75% increase in Google search interest for places to stay within the UK. Kantar Research (2020) found that nearly two-thirds (65%) of consumers preferred to buy goods and services from their own country, and 42% overall said they now paid more attention to the origin of products. Sustainability is also a priority for consumers and in a recent study by Google Think, 72% of consumers say that having a brand's values reflect their own beliefs is a deciding factor in what they buy — and consumers are increasingly prioritising sustainability. Understanding these digital trends can help us create engaging and in demand content that consumers want to see in the future.

Augmented Reality (AR) continues to grow in popularity for brands to create highly personal and immersive experiences to promote their products and experiences. Shopify found that products advertised with VR content saw a 94% higher conversion rate than products without, supporting a consumer trend for more AR experiences as part of the purchasing pathway.

Digital Approach

Covid-19 challenged web and digital capabilities, introduced many new social users and channels, created new on-line communities and increased e-commerce. Visit Belfast will continue to accelerate its digital marketing capabilities keeping us at the fore-front of digital communications with continued investment in new website design and development, digital channel marketing, content & activity across:

- website content
- visitor experience blogs
- apps and maps
- social media
- email marketing
- paid digital advertising

Visit Belfast's Digital Team has to continually adapt and develop in line with dynamic market environment, emerging consumer sentiment and preferences, together with changing Covid-19 public health advice. Key to our approach across all platforms will be:

Digital Stories: Recruit, collate and curate interesting stories that showcase Belfast and its gateway role. Development of user generated content so visitors can build their own memorable Belfast City & Region experiences.

People Centred: Authentic & credible visitor content & user experiences across our digital platforms inspiring visitors to stay longer and return. Video plays a major part in consumer’s experiences when on social media platforms in particular and we are looking to further develop the story telling of Belfast and its people in an immersive and compelling way through video.

Know Before You Go: Keeping Belfast on must do lists of international visitors given the slower return of these inbound markets. Further development of multilingual provision for online web and screen channels.

Targeted: Inclusive cross-generational consumer database marketing that supports business and leisure marketing & sign up initiatives.

Continuous Evaluation: Data capture, predictive analytics and measurement to support marketing and communications activity.

Experimenting: new channels, content features and platforms that our audience demographic use will help us engage and further promote Belfast as a travel destination e.g. TikTok videos, YouTube videos and Instagram Reels.

Content Planning

Visit Belfast’s content plans illustrated below, will constantly evolve in line with city positioning, sentiment research, key themes and with experiences and products that will effectively engage with today’s and tomorrow’s visitors across different stages of their pathway to purchase.

Digital Content Plan



Web and Digital Development

Search Engine Optimisation

It is important that Visit Belfast continues to maintain its position as the top ranking trusted website for visitor information on Belfast, particularly as 81.5% of traffic comes to VisitBelfast.com through search engines with only 9% coming direct (*remainder of acquisition derives from social, paid search, email marketing etc.*) Visit Belfast also continues to develop its strong SEO offering to ensure it appears top of organic searches including working on Google my Business, Google Maps, Google Events and Google imagery to ensure that not only are we 'feeding' Google to ensure the website is kept at a high level in rankings but also to ensure that when searched for, the City of Belfast has relevant, reliable and quality content at the forefront.

Mobile Optimisation

Nearly three-quarters of all website visitors accessed **visitbelfast.com** via a mobile device (an increase of 4.5 percentage points on 2020), with the remaining 25% using desktops and tablets. This data reiterates the importance of website optimisation for mobile, and in particular, the importance of a mobile-first digital approach.

Photography & Videography

Visit Belfast will work with partners to further develop and enhance its video and photographic content to reflect key themes and communications touchpoints and showcase new products and experience in Belfast. The content curation will highlight and illustrate unique and home grown products alongside anchor products that can promote and position Belfast as a vibrant, cultural tourism destination. This will highlight Belfast, not only as a safe and resilient city, but also enable visitors to immerse themselves in our culture, environment and community highlighting the stories that the people of Belfast have to tell. Visit Belfast will continue to work with Belfast City Council, Tourism NI, Tourism Ireland and partners to acquire and augment the City's content assets.

Social Platforms

New imagery and promotional assets are required to promote Belfast and increase engagement across Visit Belfast's social platforms. We will continue to utilise user generated content (UGC) to populate our Instagram account as well as sharing these photographs across Facebook and Twitter. We will develop partnerships with local photographers and videographers to curate and capture new imagery of Belfast on a continuous basis including neighbourhoods and lesser known attractions and experiences.

Paid Digital

Targeted paid digital advertising has become increasingly important to support organic communication across Visit Belfast's social media platforms to enable us to extend our reach with key audiences. Social media activity is designed to drive traffic to **visitbelfast.com** and to support campaign activity and conversions.

Analytics

Continuous monitoring and analysis of our social media channels, websites and digital marketing activity will ensure that we are presenting content that engages with our audiences. Analytics provides

knowledge and insights into our audiences and enables creation of relevant and timely content and messaging.

Digital Projects

Visit Belfast will expand and transform its digital footprint and embrace and develop new and innovative ways to inspire, engage and inform visitors:

Website Design and Development – **visitbelfast.com** is at the heart of our digital and marketing communications and provides a crucial pathway that influences every stage of the visitor's decision making process to visit a destination, before, during their stay and even afterwards Visit Belfast's main visitor website (which also delivers content to the visitor servicing screens) is now 7 years old and further investment is required. This will include refreshed design reflecting city positioning and branding, improved user experience and navigation and incorporation of new technologies and best practice to future proof for a further 3-5 years.

Video Content: video content has become the preferred content across social media platforms. Creating authentic and inspiring video content to visually showcase partners and the city offerings in an impactful, immersive and engaging way, will help organically grow our engagement. It is imperative that we create video content specifically edited for each of our social platforms to remain connected and engaged with our audience and be seen to be at the forefront of digital innovation.

Augmented Reality (AR): AR enables visitors to learn more, experience more and enjoy more about the destination. The rolling out of 5G technology will accelerate the use of AR in tourism marketing – Visit Belfast wants to invest in development of this creative application in our marketing, sales and visitor servicing.

Experience Belfast App: develop a Belfast Travel App to provide travel inspiration and planning, hotel and ticket booking, in-destination navigation and geolocation functionality, search and filter tools, social media integration, translations and tempting promotions.

QR codes: a trending channel for marketing, QR codes are now being used by millions of consumers. Development would enable Visit Belfast to provide fast information about products or services to our visitors' mobile devices before and in the city. QR codes can be added to screens, brochures, adverts, and landmarks.

Digital Map: development of a partner-based map on **visitbelfast.com** segmented in to categories (Eat & Drink, Retail, Sport Outdoors etc.) to enable the creation of personalised itineraries.

Public Relations and Strategic Communications

Public Relations (PR) and Strategic Corporate Communications will continue to drive and positively reinforce Visit Belfast's reputation and wider awareness of its sales and marketing plans, visitor servicing and commercial activity to key consumer and corporate audiences, including funders, partners and wider stakeholders through media local, national and international media relations.

PR and Communications will also be critical to rebuilding Belfast's position as a vibrant short break, conference and cruise destination by shaping and reshaping narratives, harnessing influence, storytelling, activating campaigns and accessing markets near-to-home, regionally, in the Republic of

Ireland and in our primary out-of-state market, Great Britain, and, when appropriate, in direct access European cities and elsewhere.

Crucially, through the effective implementation of renewed and refreshed stakeholder management strategies and carefully executed media relations activity, Visit Belfast will continue to harness the power of PR and Communications to invaluable guard against reputational risk and strengthen its position and influence.

Destination PR in a Competitive, Multi-channel Media Landscape

Digital PR Communications will be crucial in ensuring Visit Belfast's persuasive and powerful destination messages, brand narrative, stories and endorsements are compellingly and carefully connected to priority audience segments and stakeholders.

Pivotal as part of all integrated marketing and communications activity, PR and Communications will play a determining role in supporting and enhancing Belfast's tourism image and the tourism industry's renewed focus on sustainability and protecting the environment, its importance to the wider economy while improving perceptions and influencing positive destination awareness and choice.

Through compelling messaging, narratives, storytelling and imagery, and by increasing use of video and photography to extend digital reach and content opportunities, Visit Belfast will accurately position the city's strengths as a unique, attractive and welcoming leisure, business and cruise destination, building confidence among key audiences as part of a focused multi-channel approach.

Visit Belfast will also expand communications activity to promote less well-known visitor attractions and hospitality offerings more widely to help support and sustain local communities, neighbourhoods and micro economies across the Belfast City Region and which advance and nurture activities that promote sustainability and community cohesion.

Capitalising on Belfast's strengths, Visit Belfast will harness the power of PR and Communications to create and credibly convey the city's people, character, culture and place stories that excite, engage and drive action.

Targeting digital channels, traditional media and social media influencers, which will provide a balanced mixture of credible coverage and important peer-endorsements, Visit Belfast will rebuild and strengthen media engagement to consistently promote Belfast as a safe, welcoming, green and sustainable city-break destination.

Working with our partners, Tourism NI and Tourism Ireland, Visit Belfast will develop and deliver a calendar of integrated PR support activity with themes and messaging that is sensitive to prevailing health and travel conditions and the motivational needs and aspirations of potential visitors.

Stakeholder Engagement: Protecting and Growing Visit Belfast's Reputational Success

Visit Belfast's reputation drivers are dependent on an increasing number of factors, from the quality of employees to the quality of the services we deliver, to board and financial performance through to corporate culture and sponsor and partnership relationships. It is therefore imperative that we remain alert to all factors when working to build and safeguard our corporate and organisational reputation.

As part of our 2022-23 operational plan, Visit Belfast will regularly reinforce stakeholder engagement activity to enhance and protect corporate reputation, build greater resilience and support, drive loyalty and create new partnership opportunities.

With over 500+ partners, Visit Belfast will also seek and identify a series of collaborative, mutually-beneficial PR opportunities that support its goals and those of the wider tourism sector.

Corporate Communications: Creating positive impact and driving opportunities

Visit Belfast will develop and deliver an effective corporate communications plan to support objectives, ambitions and address challenges and to positively make aware and inform key audiences, partners and stakeholders of its key role and responsibilities, milestones and strategic successes achieved, including KPIs achieved, award successes and business wins.

By using and developing multi-channel approaches, and re-engaging and renewing relationships with key business and trade media through meaningful engagement, briefings and informal meetings and gatherings, Visit Belfast will reinforce messaging that tourism is central to building a vibrant and resilient economy, delivering inclusive growth and protecting the environment.

Corporate PR Communications will continue to act as a tool to positively profile Visit Belfast's role, strengths and successes across business and trade media channels in Northern Ireland, Great Britain and the Republic of Ireland and in other markets where credible news on milestones, successes and developments provide an opportunity to advance and capture new growth opportunities.

Sentiment Measurement

Personal recommendations and word of mouth have always been primary influencers in consumers' travel decision making; and as we live in an increasingly digital space much of those conversations have moved online. People are central to any visitor experience and peer-to-peer conversations provide honest and frank insights into a destinations offering perceived or otherwise.

Measuring sentiment through the collection of unprompted and unbiased data sources allows destinations to see if their visitor promise is really aligning with on-the-ground visitor experiences and by capturing the sentiments shared by online word of mouth, it provides a powerful way of monitoring the success of a place, no more so than now as we emerge from the vagaries and challenges of a post-pandemic World.

Tourism Sentiment Index

Visit Belfast has subscribed to the Tourism Sentiment Index in order to gain real-time insights in to what's really being said about Belfast through data gathered from over 500,000 online, peer-to-peer communications platforms including TripAdvisor, Twitter, Facebook and review platforms.

Being able to better understand current visitor sentiment, we can adapt our messaging and proactively shape our marketing and communications to raise Belfast destination profile and support the development of the city's brand identity in our core markets. It will also help inform Visit Belfast's ongoing and seasonal messaging as we can react to topics generating the most positive conversations, know what our audiences are looking for and what stimulates positive engagement with the destination as well as countering topics that have the potential to detract, and ultimately optimising the organic sharing of positive word-of mouth.



While Belfast started 2021 behind the UK average, due to the post-Christmas lockdown, sentiment and proactive multi-agency communications and promotion around the reopening of tourism from May onwards has seen an overall improvement in the conversations about Belfast. The last four months of the year saw a notable rise with Belfast sentiment above the UK visitor sentiment average by an average of 11% from Sept-Dec. October was the highest performing month with a Tourism Sentiment Score of +25, above the UK visitor sentiment average where Festival & Events & Dining were the topics that drove the most positive sentiment and volume of conversation.

The partnership with TSI over the last twelve months has been an iterative process of learning and understanding how Visit Belfast’s marketing and communications can better harness these insights more fully and ensure tourism is a driver of good news for Belfast and highlight the value of successful and vibrant tourism sector to the wider city identity. During the time working with TSI, they have launched a partnership with TripAdvisor, to further develop the dashboard specifically for DMO and recently released their *Top 100 Most Loved Destinations Around the World* report based on global rankings of tourism sentiment – this new report will provide us with an external picture of how brand Belfast is performing against other destinations in the UK and elsewhere on a quarterly basis. While Belfast didn’t make the Top 100 in this first report (Belfast was ranked 317), we did make the top 4% of the 10,000 destinations measured – above London, Brussels and Prague.

3.2.2 Partnership and Commercial Plans

Visit Belfast Partnership

Partnership is vital to the ongoing success of Visit Belfast and central to delivering our tourism, marketing and sales plans for the Belfast city region.

Visit Belfast introduced a revised paid partnership scheme in April 2021 as the city moved out of the pandemic and towards recovery. Through a robust partner engagement plan, partners were kept informed of changes to the scheme, how to best utilise their partnership and of Visit Belfast plans for the incoming year. The team continued to provide a high level of customer service throughout which resulted in 84% retention rate, testament to the value of the partnership scheme and the return on investment it provides for our partners.

Visit Belfast will continue to review the scheme annually ensuring it remains relevant, cost effective and attractive to partners.

A new exclusive partner area will be introduced within **visitbelfastpartners.com**, to share industry insights, training documents, along with new and exclusive marketing opportunities. The partner area will be a great resource providing a one-stop-shop for tourism insights, city and region product knowledge along with useful training documents and hints and tips. The area will be password protected and available to Visit Belfast partners only.

Green Tourism will remain a partner benefit into 2022-23. The partnership team will continue to support the Sustainability and Impact Manager in the promotion of the Green Tourism accreditation in an effort to support Belfast City Council's Resilience Strategy and demonstrate how the tourism industry can play a key role in transitioning to an inclusive, zero emissions economy within a generation.

Partnership Events Programme

Visit Belfast will continue to develop and maintain strong working relationships with tourism and hospitality partner businesses across the city region to effectively market the destination. The Commercial and Partnership team provides a high level of customer service, organising a range of workshops/webinars supporting both partner and Visit Belfast's operational plans.

Events schedule:

March/April: Business Plan/Guest Speaker Lunch - informative event outlining Visit Belfast's business plan and inspiring partners to get involved

May: Partner clinics in North, South, East and West of the city - information on how to maximise partnership benefits, meet-the-team and speak first hand with Visit Belfast sales, marketing and visitor servicing experts

June: Digital and social media workshops – skills development and advice, staying ahead of trends

Sept: Visit Belfast AGM and networking event

Dec: Christmas networking event

Corporate and Strategic Partnerships

Visit Belfast recognises the importance of strong industry and business partnerships and seeks to support and further develop sponsorship and partnership relationships with its current corporate and strategic partners. Development of new ways of supporting partnership commitments and their important contribution to city tourism will be critical in building a sustainable and resilient tourism economy.

Regional Tourism Partnerships

Visit Belfast's Regional Tourism Partners (RTPs) and wider partnership forums have successfully developed collaborative platforms for the city region area. The 'Belfast Plus' experience highlights experiential tourism products from Lisburn and Castlereagh City Council (LCCC) and Ards and North Down Borough Council (ANDBC). Newly branded and positioned Belfast City & Region digital communications, integrated content on VisitBelfast.com, social media channels and content across blogs, e-zines and literature have been key platforms for the promotional activity supported by the

wider marketing, business development and visitor servicing teams. In 2022-23 Visit Belfast will continue to build on the new city region marketing approach and tourism recovery plans and together will develop robust and focussed marketing activity in order to maximise the potential of the city region product development and support Belfast Region City Deal tourism projects.

Community Tourism

Love Local is an increasingly important aspect of the tourism offering and enhances the visitor experience. It has the potential to be a key contributor to the city's growth agenda: authentic experiences, telling our stories, hidden gems and political tourism are all key strands of Belfast's rich cultural heritage and growing product offering which Visit Belfast is committed to promoting through partnerships with key tourism organisations and area partnership boards including Fáilte Feirste Thiar, EastSide Partnership and the neighbourhood businesses within these communities. Visit Belfast will develop and create marketing opportunities and experiences aligned with Belfast's shared ambition for tourism and to ensure wider ownership and benefits of leisure, business and cruise tourism beyond the city centre. The relationship of smaller experiences to each other and to the main city attractors should be strengthened and Visit Belfast will act as a key conduit and catalyst for this.

Cultural Tourism

Cultural tourism is defined by UNWTO as tourism centred on cultural attractions and products and is one of the fastest-growing segments of the tourism industry, accounting for 40% of all tourism worldwide (pre pandemic) It intersects with heritage, crafts, performing arts, gastronomy and festivals and events so integrating into the main tourism offering will be key to growing Belfast's tourism economy and building back better and stronger with social and environmental benefits. Visit Belfast is committed to working with the city's culture and arts sector and developing marketing and promotional platforms and cluster partnerships that will support this sector and amplify its key role within our successful tourism industry. Our focus will be on promoting local product makers, performers and artists across the full range of Visit Belfast's marketing channels with the aim is to encourage audience engagement, sponsor investment and wider visitor consumption of our indigenous arts and culture.

Commercial Sales

Commercial Opportunities

Commercial income generated from private sector partners was significantly diminished due to the impact of Covid-19 on city tourism and our hospitality businesses. During 2021-22, we began to rebuild and restore our partnership commercial activity with some success and this will be further increased during 2022-23, with targets to increase sales by 33%, and including additional commercial activity from publications, we should see a 90% increase on 2021. Visit Belfast aims to restore commercial income fully by 2023-24, and will do this through identification and implementation of new commercial opportunities and marketing platforms that ensure strengthened promotion and best fit for industry partners in a challenged operating environment. There will be increased focus on commercialising digital platforms, expanding opportunities on both **visitbelfast.com** and **meetbelfast.com** and social media opportunities and with the new interactive screens within the Visit Belfast Welcome Centre:

- The technology upgrade of VBWC digital screens will be a key sales focus for 2022-23. The new screens will provide more opportunities for commercial sales activity and enable wider

cross section of partners to buy in at a level that suits them. We will develop a dedicated sales brochure promoting the new digital screens, price points and packages aimed at a targeted list of industry partners and other associated businesses

- Seasonal and sector-led promotional bundles will be introduced, offering bespoke, value-for-money packages for businesses to promote their products or services including a range of new and existing digital opportunities
- Pilot new VBWC commercial 'residencies' throughout the year for example tour operators and visitor attractions during cruise season or voucher providers leading up to Christmas
- Optimise sales potential of existing and new digital marketing and social platforms, providing seasonal themed opportunities that target multi-generational and younger demographics
- Piloting a new gift voucher scheme for Belfast tourism activity providers, similar to the Belfast Restaurant Voucher. Further research and consumer analysis is required before development

Cruise

The successful return of cruise tourism this season provides much needed footfall and spend for the city and region, as well as a return of important sales income opportunities for Visit Belfast in 2022. Alongside the existing three main commercial sponsors/partners, we will develop additional digital packages and promotional opportunities that will extend sales platforms to other regional tourism partners.

Conference Guide 2023-25

The Commercial Partnership team will support the Business Tourism team in the delivery of a new Belfast and Northern Ireland conference guide securing advertising sales income from conference venues, attractions and conference support services.

3.3 BUSINESS DEVELOPMENT

3.3.1 Business Events

After a prolonged period of closure, the welcome return of in-person conferences and exhibitions from August 2021 was a key milestone in the MICE calendar in restarting business events tourism and beginning to re-build confidence amongst organisers and delegates in hosting live events. While the shift towards virtual conferences and events offered an interim solution during the Covid-19 pandemic, after almost two years spent online, the sector has recognised the unique value of in-person meetings and conferences that provide enhanced intellectual exchange, nuances of learning, development of personalised, professional relationships and deeper connections.

Throughout 2021-22, Visit Belfast successfully worked in partnership with its venues, hotels and clients to retain booked business for future years and to reschedule and re-plan events, often multiple times. Our flexibility, resilience and collaboration have been key to retaining such high levels of business in such uncertain and testing market conditions. Visit Belfast also worked in partnership with Belfast City Council and Tourism NI to develop a COVID-impact process as part of the Conference Support Scheme which helped to retain important business during the 2021-23 period: notably, 71% of Visit Belfast clients have the potential to bring repeat bookings to the city so these retention efforts during the pandemic are also critical to winning future business for the destination.

Visit Belfast's 2021-22 sales and marketing activities have generated an additional 126 new leads worth over £93m to date, further building the business events pipeline for future years. Market confidence has however been impacted by Covid-19 with many decisions on destinations and new bookings on hold or postponed, none-the-less Visit Belfast has secured 44 conferences year-to-date which will bring 13,574 delegates to the destination in future years. Currently, there are 118 forward booked conferences for Belfast between 2022 and 2029 worth £79.2m in economic impact.

Visit Belfast Forward Booked Conferences at 1st February 2022

Year	Conferences	Delegates	Bed nights	Economic Impact
2022	75	30,414	105,650	£38.1m
2023	28	17,395	56,274	£24.0m
2024	8	5,908	17,499	£8.0m
2025	4	2,030	7,591	£3.3m
2026	1	1,100	3,300	£1.6m
2028	1	750	3,000	£1.4m
2029	1	1,300	5,200	£2.5m
Total	118	51,568	198,524	£79.2m

In spite of the challenges the industry has faced, 2022 is set to be a strong year for business events, with 75 inbound conferences welcoming and estimated 30,000 delegates, 105,650 bed nights and generating an economic impact of £38.1m.

Key Trends and Themes

The mega-trends that have re-shaped the business events sector post-pandemic and will continue to impact future demand and growth levels in 2022-23 include:

Virtual and Hybrid

Virtual and hybrid meetings have provided a range of solutions for the MICE sector, some of which will remain relevant moving forward. The level of adoption for hybrid or virtual meetings will continue to vary across different event types and their requirements.

It is also predicted however that the shift to long-term hybrid working will likely create new demand for in-person events with a need for teams to come together in person, more frequently in an organised way through company meetings and conferences.

Larger conferences, particularly ones with a strong international component, are likely to require some form of virtual element to increase participation and reach, ensure inclusivity or as part of contingency planning arrangements.

The Power of Live

Research from Stanford University in 2021 reported that video conferencing causes greater stress and exhaustion than in-person meetings; and while virtual has its place, the evidence gathered from conference organisers and participants has shown it to be less effective for business meetings and events.

ABPCO's delegate confidence survey also highlighted the importance of in-person events with delegates citing that 93% of respondents missed the networking, social interaction and business connections that come from in-person events. The ICCA Association Meetings Needs Survey (2021) also highlighted the following:

- 84% felt virtual meetings impacted on networking discussions
- 70% felt you are more likely to meet new people and make connections in your field at face-to-face events
- 66% thought face-to-face offers a greater sense of community and support
- 53% said face-to-face meetings offered the opportunity to immerse into the subject, away from daily tasks
- 44% said face-to-face provided the ability to meet with a range of people in one place
- 41% said face-to-face meetings allowed delegates to experience the host destination
- 27% said they gained a better understanding of a subject matter in face-to-face meetings

Sustainability

The sustainability agenda is continuing to shape the future of business events: 90% of event organisers say that an increased focus on sustainability is critical (IMEX research). Sustainability credentials and support is now widely being used as a criteria for selecting destinations, venues, hotels and suppliers and is increasingly a pre-requisite for winning future business in this segment.

Organisers want re-assurance that the impacts of their events will be minimised as far as possible and action plans put in place. Sustainability will be a key element of procurement policy among organisers, requiring evidence of sustainability credentials in proposals and bids. CSR, legacy and impact issues are also high on the agenda, with event organisers needing to demonstrate business value and evidence of meeting responsibly.

Post-pandemic, there will likely be changes in the requirement to travel particularly within the corporate sector as organisations seek to reduce their carbon footprint. Budgets and carbon costs of travel will become much more heavily scrutinised, and travel needs and meetings are re-appraised to ensure they are important, relevant and of value to the organisation.

ICCA Global Meetings Protocol research (2022) reported one of the top five priorities for host cities is the need to balance business events growth with responsible and sustainable development. Visit Belfast, as part of the *Rebuilding City Tourism 2021-24* three year recovery strategy has placed sustainability at the heart of the organisation, transforming the way we do business going forward.

Business Impact and Legacy

The case for in-person events across corporate and association segments has to be robust and demonstrate its value in impact and legacy.

Destinations are increasingly required to take on a greater management and legacy role to assist clients with impact and legacy plans for their events. According to the ICCA Global Meetings Protocol (2021), most associations think DMMOs should make 'working with associations to achieve their legacy objectives' a number one priority. Taking a more strategic approach to better align destination strategies with client needs will be an important factor for long-term growth. In 2022-23 Visit Belfast will pivot to a more destination management role in relation to specific conferences in order to capitalise on the potential legacy impact for the city.

Sector knowledge and reputation remains a primary consideration for destination selection and therefore Visit Belfast will continue to concentrate sales research and bidding in areas aligned to Northern Ireland sector strengths, corporate base and areas of research excellence.

Market Incentives and Financial Support

Destination and host city financial support is the number one request from associations (ICCA/ABPCO) given reduced income and depleted reserves as a legacy of the pandemic. Combined with significantly increased costs of delivery, this will mean financial support and market incentives will continue to be a critical factor for the return of in-person business events going forward.

Post-pandemic, there will be intense competition from other destinations and venues. In the ROI market, Fáilte Ireland announced €100 per out-of-state delegate for new 2022 bookings, which was previously €10 per delegate. ACC Liverpool has also recently launched a campaign to pay commission upfront to venue-find companies and agencies, to support cash flow and incentivise bookings.

With aggressive competition for less business, it will be important to build on the success of the Conference Support Scheme funded by Tourism NI and Belfast City Council and delivered by Visit Belfast to ensure that the city remains competitive in key markets.

Regional and National Events

The trend towards more regional and national conferences continues and with 65% of all Visit Belfast wins typically from the GB & Ireland markets, the city is well placed in these markets. In the short to medium term, agencies and corporates are also more open to closer to home destinations than before, due to the perceived risk of international events and supported by the love local, staycation and sustainability trends.

While international conferences and events make a welcome return in 2022 with 26 European/International conferences planned for Belfast, however event organiser and delegate confidence remains cautious due to the continued uncertainty of changing Covid-19 travel restrictions.

Strategic Interventions to Drive Business Tourism and Business Events Growth

Year One of Visit Belfast's Rebuilding City Tourism 2021-24 laid the foundations for a number of strategic developments which will accelerate conference sales in future years. Implementing and driving these initiatives forward with urgency will be the focus of the 2022-23 business plan.

Ambassador Circle: Next Generation Ambassador Programme

Visit Belfast in partnership with Invest NI works with Queen's University, Ulster University, Tourism NI, Visit Derry, and ICC Belfast to strategically develop the recently launched Ambassador Circle, the next generation 'Ambassador Programme' for Northern Ireland.

With eight-in-ten business events hosted in Belfast secured through the Ambassador Programme, it continues to be Visit Belfast's single most important sales channel to drive long-term recovery and growth. In the past 20 years Visit Belfast's ambassador programme has generated £355m in economic impact and secured over 280,000 delegates for the destination.

The 10X Economy Strategy sets out bold ambitions for economic recovery and future growth for Northern Ireland and identifies five priority cluster areas where there is an emergence of significant capability and capacity and that have the potential to drive the economy forward. The new Ambassador Circle Programme will target these cluster areas to identify and attract key business events to Northern Ireland and contribute to the 10X Economy Strategy. By attracting these events to Northern Ireland, it is a powerful way to showcase the world-leading skills, knowledge and innovation that exist in Belfast and Northern Ireland, promoting the destination as an exciting place to visit, work, study, invest and do business.

As part of the Ambassador Circle, five strategic advisory panels have been established around the priority clusters. These advisory panels bring together the key partners (Invest NI, Tourism NI, Visit Belfast, Visit Derry, Queen's University and Ulster University) and 50 high profile business and academic leaders to assist Visit Belfast in targeting and securing key business events and conferences to Northern Ireland:

- Life and Health Sciences
- Advanced Manufacturing
- Technology (Digital, ICT and Creative Tech)
- Food, Drink and Agri-Tech
- Financial, Business and Professional services (inc Fintech)

The sector experts and advisory panels will help shape event activation and legacy plans for business events in order to lever wider economic development, education and research benefits. These advisory panels will meet biannually and the Ambassador Circle Steering Group will provide strategic oversight, development and support.

Additional investment and support was provided by Tourism NI through the Tourism Recovery Action Plan to support brand development and activation, marketing and promotional collateral, sector promotional videos and a digital marketing campaign to recruit ambassadors and secure support.

Year Two will focus on activation and implementation plans to generate conference leads and increase the Visit Belfast pipeline which currently has 495 conferences leads worth a potential £538m economic impact for the city region. Year Two activation and implementation of the Ambassador Circle includes:

- Deliver sector specific ambassador events, accelerate engagement with advisory panel members
- Agree bid priorities and design sales plans for each sector
- Implement event activation and legacy activities for secured business events in key sectors
- Roll out marketing and new content to profile Belfast and Northern Ireland's sector strengths
- Drive international and regional NI ambassador recruitment and business events promotion in partnership with Invest NI, Tourism NI, regional business organisations and NI Connections for the international diaspora
- Drive recruitments of new ambassadors and generate new leads through partnership working in sector focussed organisations

In addition to the sector advisory panels, Visit Belfast will continue to develop and support our broader affiliate network of 1,200 ambassadors to maximise business event opportunities across all sectors and ensure all opportunities for business events are secured.

Belfast and Northern Ireland Conference Support Scheme

Visit Belfast administers the Conference Support Scheme on behalf of funders and it continues to be a critical tool for converting association conference business. Since 2011-12, the scheme has helped to deliver £105m of business generating a significant ROI of £48:1.

During 2020-21 an additional £200k for the Conference Support Scheme (CSS) was secured by Tourism NI through the Tourism Recovery Action Plan. This increased investment, together with annual funding from Belfast City Council has grown the fund to over £1m to support association conference bids.

Visit Belfast in partnership with Tourism NI and Belfast City Council amended and re-launched the scheme to improve Belfast's competitiveness and support recovery and growth through the following changes:

- Opening the scheme to smaller events generating a minimum of 100 out-of-state delegates for at least one night
- Increased funding award range (£5,000 to £100,000)
- Transparent funding model of £50 per out-of-state delegates
- Updating terms of funding to leverage greater legacy benefits for the destination

Destination financial support continues to be critical to drive business events recovery and ensures Belfast remains competitive in a challenging market place which will take longer to recover than many other tourism segments.

In 2022-23 Visit Belfast's will focus on implementing, embedding and managing the new Belfast and Northern Ireland Conference Support Scheme. Visit Belfast will conduct a competitor and market review to ensure Belfast and Northern Ireland has the most attractive, effective, competitive scheme in the UK and Ireland. Following the review any recommendations on further enhancements will be provided to Belfast City Council and Tourism NI for approval. In addition Visit Belfast will develop and launch a new pilot corporate and incentive support scheme as an intervention to grow corporate and incentive business subject to approval by Tourism NI and Belfast City Council.

Business Events Brand for Belfast and Northern Ireland

The Belfast brand was developed to ensure Belfast can compete on a global stage for visitors, business, investment and talent. Since its inception, Visit Belfast has been actively incorporating the city brand in its business tourism sales and marketing activities and promoting the city as the gateway to Northern Ireland for prospective event organisers and delegates.

The Northern Ireland business tourism strategy highlighted that Northern Ireland does not have a brand strategy for Business Events and that there is a need to develop a strong brand for the business events sector that works on both a destination and city specific level.

In 2022, Visit Belfast will be working with Tourism NI, Belfast City Council and key stakeholders on the consideration and development of an integrated business events brand strategy for Belfast and Northern Ireland. This strategic project will inform future sales, marketing and business development activities and aims to help support the 10 year growth ambition set out in the Northern Ireland Business Tourism Strategy.

Corporate and Agency Growth Plan

While Belfast has significantly increased its visibility and profile within the corporate and agency market in recent years, it still remains a relatively untested destination for GB agencies and corporates. The segment is one where GB agencies with multi-sector global client bases, work across a myriad of projects from B2B events, product launches, staff kick-offs, conferences through to corporate incentives and hospitality.

In 2022-23, a focused GB agency and corporate sales growth plan will encompass a range of activities targeting new agency and clients, building on existing relationships to date and drive lead generation. The plan will increase corporate and agency referrals for proposed and converted business through:

- In market GB-based Business Tourism Sales Manager
- Strengthening, long-term relationships with key decision makers within GB agencies and in-house corporate planners
- Educate, inspire, and influence key industry contacts about Belfast/Northern Ireland
- Building the brand and profile of Belfast and Northern Ireland as a credible business events destination

MICEBOOK Legacy Initiative 2022-23

To capitalise on the recent MICEBOOK Agency Leader's retreat which was held in Belfast and Northern Ireland, Visit Belfast and Tourism NI will launch a legacy initiative to build and secure relationships with future leaders in key GB agencies.

Each Agency Leader will nominate a high potential member of their team to take part in a talent and learning programme delivered in partnership with MICEBOOK and Visit Belfast in 2022-23. It will include an immersive programme in Belfast and Northern Ireland that includes training and educational content to prepare future event leaders for industry challenges as well as showcasing the destination, building product knowledge and creating advocates for Belfast and Northern Ireland in key GB agencies.

This initiative aims to establish high level relationships with agency leaders by investing in their future talent while also embedding Belfast and Northern Ireland champions within GB event agencies at an early stage of their career. The programme will be a pilot initiative in 2022-23 and could be extended in future years through MICEBOOK.

Destination Management: Maximising Business Events

Visit Belfast will dial up its destination management role in order to encourage conference delegates to stay longer and spend more by utilising its prime position and its relationships with event organisers and access to delegates to influence extended stays and repeat visits. Interventions include:

Campaign Pilot for 2022 conferences

Research indicates that one-in-three business delegates return to their business destination for a leisure break and Visit Britain analysis undertaken in 2018 highlights that international delegates have the highest propensity to extend their business trip for leisure purposes. As a pilot initiative, Visit Belfast will seek to partner with 2022 events with two campaigns to incentivise leisure trips.

Extender Bleisure Campaign

International conference delegates will be targeted with a digital campaign inspiring them with reasons to extend their visit to Belfast together with a bookable incentive and timed in line with the opening of event registrations. Campaign timing is likely to be the most critical factor in determining extensions as the window to influence extensions will be before flight bookings are made.

Repeat Leisure Breaks

GB/ROI conference delegates tend not to extend their conference stay as travel options make for an 'in/out' visit to the destination. National conference delegates will therefore be targeted with a digital campaign and booking incentive to return to Belfast and NI for a short break within a certain period.

This destination management approach levers Visit Belfast's relationships with conference organisers, creating touch-points with business delegates travelling to the city and represents an innovative approach to generating repeat leisure visits and extended stays for Belfast and Northern Ireland.

One Young World Legacy

In 2022-23 Visit Belfast will be working in partnership with Belfast City Council, Tourism NI and key stakeholders to facilitate and maximise the benefits of hosting prestigious One Young World Summit in 2023. The Global Forum for Young Leaders is the most international event in the world outside of the Olympics attended by delegates from over 190 countries. This is a landmark opportunity to showcase Belfast and Northern Ireland on a global stage as the city welcomes business leaders, activists, politicians and media from around the world to address global and local challenges. It also represents a once-in-a-generation opportunity for our young people to become part of the global 13,500 One Young World Ambassador network and effect positive change.

The governance and events framework for delivery is being led by Belfast City Council on behalf of funders and stakeholders and Visit Belfast is well placed to support the planning and delivery across a number of key areas (subject to resources):

- Industry engagement and briefings
- Volunteering
- Project management support
- Destination management
- Accommodation booking

- Destination marketing
- Visitor servicing
- Legacy and impact

Northern Ireland Business Tourism Integrated Strategy

The Northern Ireland Business Tourism Integrated Strategy was commissioned by Tourism NI and approved by the Independent Steering Group in June 2021 to deliver an additional £232m economic impact and £425m GDP over the course of the 10 year plan. The strategy aims to grow business tourism by 170% between 2019 and 2030, from £37.3m p.a. to £100.8m p.a.

The strategy not only delivers for the visitor economy but is an innovative and collaborative solution delivering across multiple policy areas namely economic development, research and higher education. Benefits include:

Economic development: Attracting business events to Northern Ireland brings the global ecosystem of an industry together and key decision makers to the region. They create opportunities for business that can drive trade and exports, are catalysts for accelerating innovation, support investments in the region and build our reputation in key sectors.

Higher education and research: Business events showcase and promote the world-leading education and research of our universities. They help create and grow international partnerships and income, attract academic and student talent to Northern Ireland, build global reputation and maximise research impact.

Tourism: Business tourism is a crucial part of trading mix for the tourism, hospitality, aviation and transport sector. It generates high-spending, mid-week and year-round visitors, particularly in the shoulder season where long-term intervention and growth is needed. The strategy will also utilise Belfast's gateway role to maximise regionality to generate and convert new business tourism opportunities across Northern Ireland that would not be secured otherwise.

Due to the sales cycle involved in attracting business events, Investment is urgently required to realise these benefits for Northern Ireland. A submission to the department for economy has been made by Tourism NI on behalf of the Independent Steering Group and is under consideration. Visit Belfast will continue to work in partnership with Tourism NI, Belfast City Council and key stakeholders to secure support and investment for the strategy, as a critical intervention to support economic recovery and growth.

2022-23 Sales Acceleration plan

Visit Belfast business development team will focus its sales and marketing activity on the identified and prioritised markets and segments with the greatest return. With market confidence for business events already showing signs of improvement, the focus will be on conversion activities for the city pipeline which is currently worth £538m, utilising sales research, the ambassador circle and in-market activity to generate new leads worth £150m in economic impact and secure £40m of new business for future years.

Segment	Markets	Interventions & Approach
Associations	GB & Ireland	<ul style="list-style-type: none"> - 1,600 GB & Ireland Associations, strongest market segment and 65% of business - Extensive in-market activity - Enhanced conference support scheme - Ambassador circle - Sustainability, impact and legacy initiatives
	European & International	<ul style="list-style-type: none"> - Target key sectors - Targeted in-market activity - Sector research - Ambassador circle - Enhanced conference support scheme - Sustainability, impact and legacy initiatives
Agency & Corporate	GB & Ireland	<ul style="list-style-type: none"> - GB Corporate and Agency growth plan - Extensive in-market activity - GB in-market representative focussed on agency and corporate business - MICEBOOK Legacy programme and future leaders - Ambassador Circle - Hybrid and tech - Sustainability, impact and CSR - New CSS scheme for corporates pilot
	European & International	<ul style="list-style-type: none"> - Maximise European and International sales platforms and tradeshow - Ambassador Circle – key sectors - New CSS scheme for corporates pilot
Incentive (Reactive, supporting role)	GB European and International	<ul style="list-style-type: none"> - Support reactive incentive enquiries and leads - Partner and co-ordinate with Tourism NI and DMCs, as appropriate - New opportunities post COVID with GB corporate and agency market for closer to home incentives – support Tourism NI

Operational Activity

Key sales and marketing activities for 2022-23 will include:

- MCOCO
- CHS Show Leeds
- IMEX Frankfurt
- MICEBOOK young leaders Legacy week
- The Meetings show, client dinner and post show FAM
- M&IT Agency Challenge
- C&IT Festival of Forums
- M&IT Awards
- C&IT Awards
- EventIT
- IMEX USA

- Association Excellence awards
- MICEBOOK
- IBTM Barcelona
- IAPCO Council
- Site Visits & FAMs
- Ambassador Circle sector events
- Ambassador Circle Awards and networking events
- PCMA, ICCA, ABPCO, IAPCO and MIA industry events and platforms

3.3.2 Travel Trade

Travel Trade

Positive feedback from major global operators suggests that 2022 inbound travel to UK & Ireland is up on 2019 levels with a major boost from a 'rescheduled not cancelled' trend across the board. Travel Trade is an important segment for Visit Belfast partners particularly amongst accommodation providers, attractions, tour operators, activity providers, bars and restaurants.

While Covid-19 impacted visitor confidence and group bookings, confidence is returning within the GB & ROI, European, American and Canadian markets to travel in 2022.

Key trends and themes include:

- A marked return in confidence amongst operators and their clients
- Increased demand for FIT with "Experiential travel" being a much used phrase with visitors asking to get off the beaten track and really experience the destination, rather than just visiting
- Clear pent up demand to travel in certain markets inc. North America
- There remain a number of markets with significant travel restrictions remaining, impacting on demand from markets including China and Japan
- A consistent issue for operators throughout during the pandemic has been navigating two jurisdictions on one island. Operators having to keep up with protocols to fly into Dublin and different protocols to cross into NI have been a source of frustration
- In the recovery period, Visit Belfast has an important role to play to support the travel trade, providing a one-stop-shop for incoming operators considering Belfast and the wider region. Visit Belfast will offer guidance and support for incoming operators and groups, updates on product changes, new itinerary development and provide enhanced account management to support travel trade as they resume near normal operations

2022-23 Market Prioritisation and Key Account Management

Working with Tourism Ireland and Tourism NI, Visit Belfast has identified priority geographic markets for Belfast to focus on and develop relationships. Visit Belfast will partner with Tourism NI/Tourism Ireland to capitalise on industry platforms in order to sell Belfast and maximise opportunities for inbound travel trade.

Visit Belfast has developed a key account management structure in order to prioritise sales activity as follows:

- Gold:** 61 operators. Top inbound travel trade with the greatest volume and value, as well as operators with high growth potential
- Silver:** 119 operators. Medium volume and value travel trade, such as those bringing occasional ad-hoc business or low volume series business
- Bronze:** 494 operators. Low volume and value travel trade such as travel agents who don't specialise in the UK & Ireland region but still have potential to influence FIT and small group bookings

Re-prioritised markets for 2022-23	Rationale
GB & Ireland	High volume, high propensity, established operators with room for growth.
North America	High value, high propensity, increased Dublin access, increased demand and growth
Europe (Tier 1) Germany, Austria, Switzerland & the Netherlands	Good volume, lower spend, opportunity for Belfast to be included as part of a UK/Ireland itinerary. Markets have a strong propensity to book via tour operators & travel agents
Europe (Tier 2) France, Spain, Italy and Nordics	Lower travel trade volume, market has as strong propensity to travel independently with proactive operators who require support and deliver reasonable volumes

Sales and Marketing Activity

Visit Belfast will focus its efforts on priority sales and marketing platforms during 2022-23, in order to secure business for the city region and at the same time grow the number of operators carrying Belfast city region product.

- World Travel Market
- Explore GB
- Tourism NI Meet the Buyer
- Tourism NI Coach and Group Operators workshop
- Celtic Connections
- ETOA Britain and Ireland Marketplace
- ETOA GEM
- ITOA event
- Tourism Ireland workshops (budget permitting)

Virtual sales platforms have played an important part of remaining connected with operators during the pandemic and ensuring Belfast remains front of mind. In 2022-23 Visit Belfast will prioritise face-to-face and in-market activity with travel trade to support recovery. Visit Belfast will undertake 175 buyer engagements and generate £1.25m in travel trade leads.

Destinations like China, Japan, Australia and New Zealand which still have consumer doubts or robust protocols in place we will likely continue to engage with clients virtually.

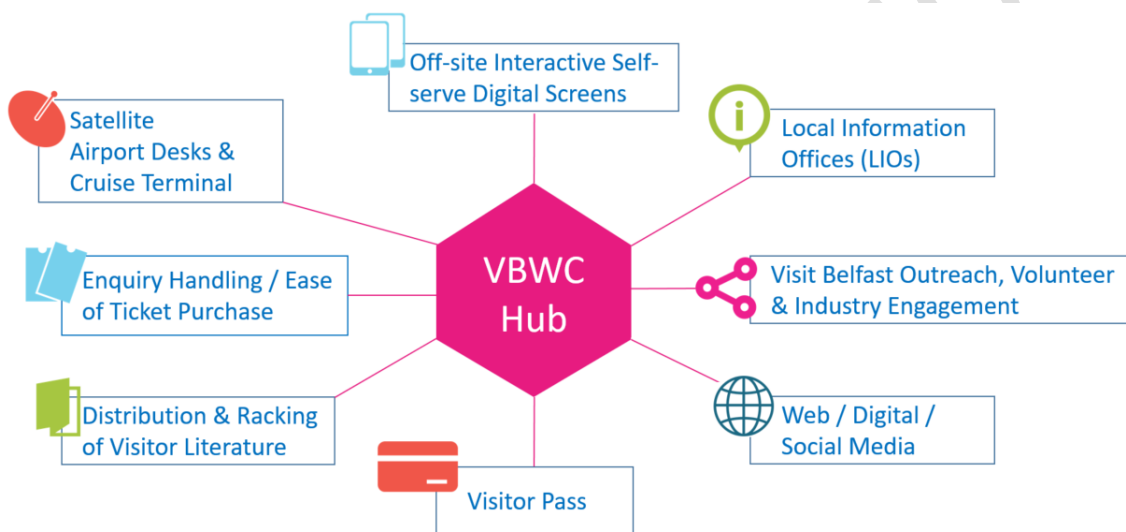
3.4 VISITOR SERVICING AND DESTINATION MANAGEMENT

3.4.1 Visitor Servicing and Destination Management

Visitor servicing is a key part of successful destination management, and both have a significant role to play in the delivery of Belfast City Council’s draft tourism strategy *Make Yourself at Home*, namely the four strategic themes: Grow, Position, Experience and Sustain.

Visit Belfast’s visitor servicing and destination management activity is based around a constantly evolving hub-and-spoke model with the Visit Belfast Welcome Centre (VBWC) representing the information and resource hub and the supporting spokes at key visitor touch points including the airports and cruise visitor information centres (VICs).

Visitor Information: Visit Belfast Hub & Spoke



Visit Belfast visitor servicing management activity in 2022-23 will focus on the following key themes:

Growing Tourism

For Belfast to be a successful destination, we know that we need to work hard at enhancing and enriching the visitor experience. Utilising our visitor servicing network our actions will be aligned to key success factors that help develop the destination by providing a wealth of information, personalised itineraries and inspiration to encourage repeat visits. The Visitor Servicing team has a proven track record in upselling and cross selling to extend visitor stay and spend which will be an important contributor in achieving the city’s stated aim of doubling the value of tourism by 2030. Research conducted in VBWC in 2021 indicated that:

- 79% of visitors to Visit Belfast VIC’s said that their visit would make them more likely to spend more in Belfast/Northern Ireland
- 56% said that their visit to a VIC would encourage them to stay longer
- 74% said that it would make them more likely to visit somewhere they had not thought of before
- 90% said their visit would encourage them to come back to Belfast/Northern Ireland as a repeat visitor

Positioning Belfast

Over a third (34%) of all enquiries handled by Visit Belfast relate to the rest of Northern Ireland demonstrating that important role visitor servicing has in spreading the benefits of tourism across Northern Ireland. The three VIC's and the Cruise Welcome Hub will continue to support the positioning of Belfast as the primary visitor gateway to the rest Northern Ireland by promoting the wealth and variety of visitor experiences through face-to-face, digital and immersive communications, promoting culture, events and stories.

Enhancing the Visitor Experience

Today's visitors are motivated by authentic, meaningful and local experiences unique to the city and region. Visit Belfast visitor servicing activity provides a focal point to inform and engage with local and international visitors as well as supporting our local tourism, culture and community partners. Our focus will be to enhance the connectivity between our 'hero' anchor attractions and smaller, lesser known tourism experiences that will extend the visitor experience beyond the city centre and into the local neighbourhoods and wider city region.

Working with a range of organisations including Translink, Sustrans, Belfast Bikes, city BIDs, Visit Belfast will promote sustainable ways for visitors and residents to explore the city on foot, bike and public transport.

Capacity Building

Tourism at its heart is a 'people' business and the success of any visitor experience is highly dependent on the personal interactions and outputs of those who work within the industry. Belfast's tourism industry was hugely impacted by the pandemic and as a result, skills, knowledge and people were lost, yet tourism business across the City Region need to be ready to meet the uplift in demand required to rebuild city tourism to pre-pandemic levels by 2024. A focus therefore on capacity building among our industry partner is of critical importance and three areas where Visit Belfast can assist include:

City Wide Box Office: after more than 18 months of closure, concerts, festivals and events are expected to quickly bounce back to or even surpass pre-pandemic levels (Ticketmaster reported that tickets sales for 2022 events are currently exceeding 2019 levels which had been a record year for the company). Visit Belfast is working with our local events and cultural community to support their events programmes through our box office services.

Our ticketing services can provide a track and trace service for operators as well as the latest guidance to both organisers and the public on entry requirements, we also have systems in place to contact customers via mass emails/text messaging. Delivering an affordable ticketing solution for all providers is critical moving forward – and our role as the city box office can be further developed to support local cultural tourism events, experiences and local communities. Identified growth areas for ticketing will be: events and festivals, coach and taxi sighting seeing tours of Belfast and gateway areas and transport ticket sales.

Industry Engagement Programme *Get the Knowledge*: the programme aims to increase and improve destination product knowledge among visitor-facing front-line staff so they can 'upsell' the wide range of experiences across the City to visitors, improving the overall visitor experience that supports capacity building. The visitor servicing team will further develop this programme to widen its reach and impact.

A comprehensive information service will be provided to all front line staff, other NI visitor information centres and transport providers (inc. Eastside Visitor Centre, An Chultúrlann, Queens

Visitor Centre, Translink and Ferryline), showcasing products, experiences, events, festivals and other local tourism initiatives such as food, drink, music and crafts.

This programme aligns with the “Love Local” concept which is a key element of Visit Belfast’s Business Plan and Belfast City Council’s *Make Yourself at Home* 10-Year Tourism Plan, ensuring that the economic and social benefits of tourism are delivered across the city and into all neighbourhoods e.g. one example of Visit Belfast supporting the love local concept, this year to date we have had sales to the value of £250,000 in Belfast Restaurant Vouchers delivering additional spend to over 73 hospitality businesses across the city.

The enhanced programme will include:

- Seasonal briefings every quarter in VBWC
- Three fam. visits to key attractions and experiences (one dedicated to Ferryline staff)
- Monthly guided walking tour of City highlights
- Monthly guided walking tour of Neighbourhood area
- Weekly What’s On e-zine to industry front-of-house database
- Monthly Belfast City Region update to NI VIC network
- 8 ‘Pop-In and See’ events (4 of which will be neighbourhood tourism focused)
- Access to online library of key product and experience collateral
- Learning materials uploaded onto **visitbelfastpartners.com** for exclusive partner access
- Recognition event – possibly with awards

Volunteer Programme: Visit Belfast is committed to extending its current 8-strong volunteer team in order to increase the range and type of support required for the effective delivery of visitor information services. This will enable the team to meet increased visitor demand levels, particularly during peak summer months and during the cruise season. The recruitment of volunteers will be open to those who are seeking useful experience in tourism and hospitality, building important skills, and provide a pathway to employment in the sector as well as to those who want to connect with communities and share their local knowledge and passion for the city.

Digitalisation of Visitor Servicing

Recent investment made possible through TourismNI funding has enabled a digital upgrade to the hardware and software in the VBWC, providing improved visitor experience including access, navigation and information acquisition. This includes utilisation of **QR codes** to access new content, top reasons to visit, images, videos, and offers which can be easily downloaded to mobile and tablet devices, and facilitate instant booking. This upgrades support the commercial sales platforms within VBWC.

Interactive Belfast Map is being developed to display information and key content on the city, its neighbourhoods, key attractions, hidden gems, and supporting connectivity across the city and encourage people to explore more.

Digital City Pass will provide an opportunity to drive demand and spend to our tourism businesses by encouraging visitors to do and see more, and by doing so, it aligns to key elements of BCC’s draft tourism strategy. Visit Belfast is working with Belfast City Council and Tourism NI to deliver this next generation pass which will provide many of the City’s seasonal cultural and tourism experiences with a tailored niche/cultural pass options to sit alongside the main City Pass.

Other Digital/Online projects for 2022-23 include the creation of an online Gift shop – which will hero local “Made in Belfast” products, digital version of Visit Belfast’s Cruise “What’s on Today” and a smarter digital or Smart Card option for Belfast Restaurant Vouchers.

Accessibility

Visit Belfast will ensure that accessibility is a priority for services provided in all three VICs and the Cruise Welcome Hub and staff are fully trained to welcome people with a disability.

We will continue to support the Belfast Agenda’s vision of making Belfast the first JAM city helping make the city a safe, inclusive area for all. All visitor-facing staff are fully aware of the JAM card that allows people with a learning difficulty, autism or any communication barrier to tell others that they need ‘just a minute’, discreetly and easily. VBWC is one of 1,800+ businesses across the UK who have signed up to the scheme which currently has 85,750 app users.

As part of our visitor servicing development programme, we will be extending our language skills training to include British Sign Language (BSL) to our core team of visitor advisors.

2022-23 Projected Visitor Servicing Footfall and Enquiry Levels

With most travel restrictions being lifted locally, nationally and internationally, the return of a city events programme including the World Irish Dancing Championships Cathedral Quarter Arts Festival, Eastside Arts Festival, Féile, Belfast International Arts Festival, alongside 75 conferences and 150 cruise arrivals we are expecting a significant increase in the demand for visitor services.

Key productivity measures will include the following:

- 516,000 enquiries (+98% on 2021-22)
- 327,675 visitors through VBWC and two airport desks
- Visitor satisfaction levels (85% very satisfied/15% satisfied)
- Generating an economic impact £10.8m

VBWC projections

- 342,996 enquiries (+75%)
- 198,425 visitors through the door
- Generating £7.5m additional spend to the local economy

Airport VIC projections

- 109,500 enquiries handled at BIA (+82% on 2021-22)
- 63,800 enquiries handled at GBBCA (+200% on 2020-21)
- Generate £3.3m into the local economy

Visitor Insights

Engaging with 516,000 visitor enquiries provides the opportunity to gather a rich source of visitor data and insights, visitor profiles, destination interest and transactional data as well as conducting the quarterly Visitor Satisfaction Survey across the three VICs and the Cruise Welcome Hub.

Commercial Income

Pre Covid-19, the commercial success of Visit Belfast's business model saw 49% of all visitor servicing running costs met by its commercial and sales activities. This meant that Visit Belfast was able to meet a 70% increase in the demand for visitor servicing and a 58% increase in gateway enquiries over the last six years without requiring an increase in public sector funding. However, due to the decrease in visitor footfall as a result of Covid-19, and estimated visitor numbers in 2022, the projected commercial income of £401,000 will be only 68% of 2019-20 levels. This is driven by net retail sales £143,350, ticketing commissions £56,092, services charged out and desk sales £72,410, other commissions and airport support £45,836, and sales of advertising platforms in the three VICs and Cruise Welcome Hub £82,436.

Given the expected income levels for 2022-23, the following operational changes across the VIC sites will be implemented:

- Reduced Sunday opening in low season in VBWC
- Extended opening times in VBWC from July to September only
- BIA opening 6 days per week in shoulder season
- GBBCA opening 6 days per week in peak and 5 days per week (Jan, Feb and Nov)

To help meet the expected demand for visitor servicing activity and to provide the welcome, orientation, information and inspiration required by visitors in 2022-23, Visit Belfast will be enhancing the volunteering and ambassador programme to help deal with peak demands.

Summary of Visitor Servicing Key Aims

- Positively engage and provide welcome and assurance to approx. 516,000 visitor enquiries, delivering an economic benefit of circa £11m.
- Handle 162,000 gateway enquiries, ensuring the benefits of tourism are extended into the City Plus area and the rest of Northern Ireland.
- Generate net commercial revenue of £401k through services provided.
- Maintain visitor satisfaction levels with our services at 85% very satisfied, 15% satisfied.
- Provide a warm and reassuring welcome to cruise passengers on up to 144 cruise ships.
- Maintain quality visitor servicing at key visitor touch points, including cruise and city conferences encouraging visitors, passengers and delegates see, do and spend more, visit places they had not previously considered and encourage repeat visits, and for those who can lengthen their stay.
- Reinvigorate the volunteer team to support Visit Belfast when demand levels increase.
- Bring the "welcome" to key areas of demand, in the city centre and at events, by using our volunteers and working in partnership with City Council and the BIDS.
- Support local tourism businesses by providing sales, profiling opportunities, ticketing and connectivity.
- Support local tourism and Cultural/ Heritage attractions and experiences and connectivity.
- Continue to work with partners on City destination management projects including Cruise, Event support, Code of Conduct for City Tours Bus operators, Coach Parking.
- Extend and enhance Visit Belfast's Industry Engagement Programme, informing front-line tourism and hospitality staff on all there is to see and do across the city region in order to encouraging the "Upselling" of the visitor experience.
- Support Belfast City Council's 10 Year Tourism Plan *Make Yourself at Home* and in particular the strategic themes of Grow, Position, Experience and Sustain.

3.5 CRUISE BELFAST

Cruise tourism has been one of Belfast and Northern Ireland success stories of recent years with Cruise Belfast (the sales, marketing and visitor servicing partnership between Visit Belfast and Belfast Harbour) establishing strong and profitable working relationships with cruise lines and operators since 1999.

3.5.1 Cruise Belfast Marketing and Sales

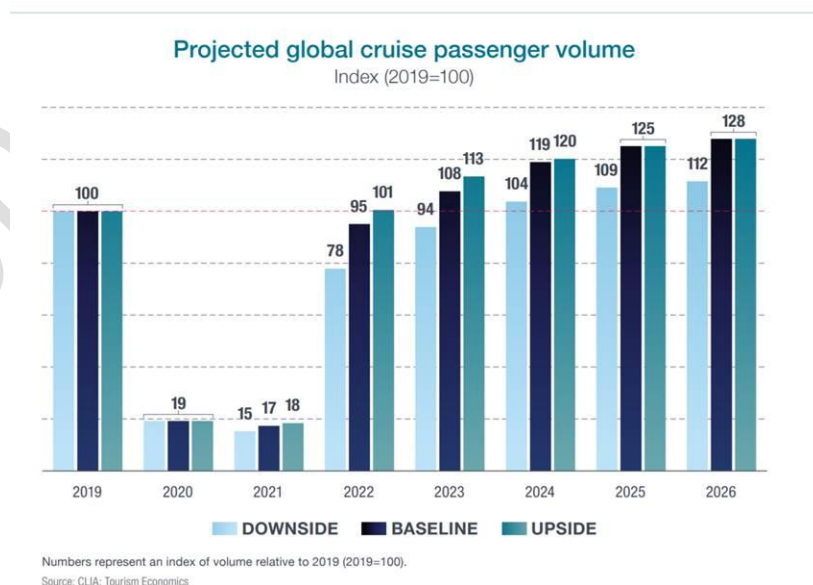
In spite of the immense challenges faced by the global cruise industry as a result of the pandemic, cruise tourism has successfully navigated its safe restart with better than expected passenger figures.

For the 2022 season, there are currently 144 calls booked bringing a potential 328,000 cruise visitors between February and November, generating an estimated £14.8m in tourism spend, compared with the 146 ships and 275,000 cruise visitors welcomed in 2019.

Cruise Market Outlook

The 2022 State of the Industry Report by Cruise Lines International Association, highlights an industry that is building back, with strong prospects for future growth. Since the first cruise restart in July 2020, 86 countries have reopened to cruise and over five million passengers have sailed. The restart has been well received by loyal cruise passengers with nearly 80% of travellers who have cruised before, saying that they will cruise again (the same percentage as before the pandemic).

CLIA research indicates 2022 will be a transition year for the global cruise industry with full recovery predicted in 2023. In the baseline forecast, global passenger volume is expected to recover and surpass 2019 levels by the end of 2023, while the upside forecast, passenger volume is suggesting it will recover to 101% of 2019 levels a year earlier. In all three scenarios, passenger volume is projected to increase by 12 percentage points by the end of 2026 compared to 2019, as illustrated below.



3.5.2 Cruise Ship Visitor Servicing

Safe Return of Cruise Tourism

The safe resumption of cruise tourism to Northern Ireland took place in June 2021 with the arrival of MSC's new flagship MSC Virtuosa.

This followed many months of close collaboration between Cruise Belfast, the Public Health Agency (PHA), Port Health Authority, and Belfast City Council Emergency Preparedness Group and cruise industry partners to implement a robust Covid-19 Port Management Plan. Financial support was secured through the Tourism Recovery Action Plan (TRAP) administered by Tourism NI with additional investment provided by Belfast Harbour which enabled full safe-guarding measures to be in place for the first cruise arrivals, providing as safe an environment as possible whilst delivering a warm and informative welcome for guests. To support longer term cruise recovery additional visitor servicing and business development funding was secured through the TRAP.

Cruise Belfast safely welcomed 72 ships in 2021, initially restricted to UK based passengers, and also marked a major milestone for the partnership, celebrating the 1,000th cruise call to the destination with the arrival of MS Queen Elizabeth. These arrivals brought more than 55,000 passengers to Belfast, with 15 cruise lines, with 6 ships making inaugural calls to Belfast during the season. Testament to the collective efforts of all involved. These efforts reflect the strength of the relationships with international cruise operators and the development of Belfast and Northern Ireland as an exciting and vibrant cruise destination.

Research carried out in September and October 2021, indicated that 98% of cruise visitors were very satisfied with their visit 86% were from GB, with the remaining 14% from North America and the rest of the world. Of those surveyed 69% said they would have gone somewhere in the destination they had not previously considered as a result of engaging with our Cruise Welcome team and 97% said they were encouraged to spend more, 93% were visiting Belfast and Northern Ireland for the first time, with 99% said they would be encouraged to visit again.

2022 Cruise Season

Currently there are 144 cruise calls booked bringing a potential 328,000 visitors between February and November 2022 spending £14.8m in the local economy. It is expected that Belfast will welcome 54 different ships from 32 cruise lines, of these, 18 will be inaugural calls to the city:

- 22 will visit on a Sunday, and 3 on a bank holiday
- 7 days with three ships in a day, across three different berths
- 19 days with two ships
- 40% will stay in the city after 8pm
- From April to September we have an average of 5 ships per week

Cruise Arrival Management

The cruise welcome is a key part of destination management and plays a significant role in the success in maintaining and sustaining inbound cruise tourism. The importance of resourcing this area of operations with trained and informed visitor advisors who work closely with the Belfast Harbour team ensures a warm welcome and maximises the benefits that cruise visitors can bring to the region.

Visit Belfast recruits a new seasonal cruise team each year, who will be trained and ready from the start of the season. Visit Belfast will engage with the main cruise excursion companies and shipping agents, Belfast Harbour Police and Harbour Security, experience, tours and transport providers, all of whom have a key role to play in delivering a high quality tourism experience.

In addition, Visit Belfast has applied for funding support from Belfast City Council's Community Festival Fund to deliver a *Cruise Welcome Festival of Music and Dance* in August. Visit Belfast will work with Féile Belfast, Eastside Arts and Mela to develop the programme and it will form a key part of our shore-side welcome showcasing the vibrant music and dance scene found across the city.

2022-2023 Priorities:

Cruise Belfast will ensure the delivery of a world-class welcome for the ships and their guests arriving in 2022; and by providing an excellent visitor and destination management service build on the on-going success of Cruise Belfast secure sales for 2023 onwards. Key activity will include:

- Provide a warm welcome and world-class visitor information service to the 328,000 cruise visitors arriving into Belfast in 2022
- Maximise footfall and spend to tourism partners across Belfast and NI; and by doing so, optimise the economic benefit from the 144 cruise calls
- Enhance relationships with the 32 cruise lines visiting Belfast in 2022
- Ensure high visitor satisfaction levels as measured by the cruise lines
- Develop and deliver a shore-side welcome programme showcasing the city's music and dance
- Deliver targeted sales plan with existing lines to increase future calls to Belfast/Northern Ireland
- Position the destination as a new port of call to cruise operators not currently calling in Belfast: through sales calls/presentations, fam trips and attendance at key cruise exhibitions
- Create and develop destination sales marketing propositions with suggested itineraries for shore-ex and itinerary planners
- Develop PR opportunities throughout the season
- Develop a cruise sustainability plan with Belfast Harbour

4. VISIT BELFAST 2022-23 OUTCOMES

VISIT BELFAST TOTAL OUTPUTS	2022-23 Target
Leisure Tourism Bed nights	150,000 bed nights
Leisure Tourism Day trips	100,000 day trips
Business Tourism Bed nights	82,000 bed nights
Cruise Visitors	345,000 pax & crew
Visitor Enquiries	516,000 enquiries

VISIT BELFAST ECONOMIC IMPACT	2022-23 Target
Leisure Tourism	£30m
Business Tourism	£40m
Cruise Tourism	£16m
Visitor Servicing	£11m
Visit Belfast Economic Impact	£97m
Budget	£3.6m
ROI	£1:27

Visit Belfast Change Projects – 2022-23 Outcomes

- Visit Belfast to achieve silver level accreditation with Green Tourism
- Aim to have 90% of hotel bedrooms certified with Green Tourism
- Maintain top 20 ranking in Global Destinations Sustainability Index
- Devise an impact measurement plan to measure the impacts of tourism beyond visitor numbers and visitor spend
- Implement key aspects of the Northern Ireland Business Tourism Strategy
- Aim to grow the capacity and skills of front line staff in the City by enhancing Visit Belfast industry engagement programme
- Review Visit Belfast IT infrastructure and develop IT strategy by Q2
- Development and rollout of Visit Belfast podcast channel “Pure Belfast”
- Investment and development in Visit Belfast website, city guide app and QR codes
- Development of a digital city pass to support local attractions and experiences enhancing city connectivity
- Ensure that VBWC is accessible to all and modernise accessibility equipment

5. CONCLUSION

Visit Belfast's *Rebuilding City Tourism 2021-24* Three-Year Recovery Strategy set out a new direction of travel, demonstrating a step change in our approach to marketing, sales and visitor servicing.

As with many other global destination organisations, the series of lockdowns created the opportunity for Visit Belfast to pause, re-evaluate and rethink how we influence sustainable tourism recovery and support the 500+ tourism businesses we represent. The development and implementation of our *Rebuilding City Tourism 2021-24* recovery strategy was the start of that process. 2022-23 Business and Operational Plans represent year two of this three-year recovery strategy.

Visit Belfast aims to return to pre-pandemic levels of economic output by 2024 by delivering a series of targeted demand generation projects across our leisure, business and visitor servicing activity, driving the programme for sustainable and transformational change and meeting changing visitor consumer behaviours.

The pace of tourism recovery on a global scale remains slow, uneven and unpredictable. However, Belfast has already demonstrated that it has the right balance to recover with the city's core closer-to-home markets of Great Britain and the Republic of Ireland offering the strongest growth opportunities. Overseas international markets remain a vital source for the city's longer-term tourism growth and something which Visit Belfast will not lose sight of in its recovery plans to 2024.

As the city's official destination marketing/management organisation (DMO/DMMO), and as a not-for-profit public, private and community partnership, Visit Belfast will continue to work with Belfast City Council, Tourism NI, Tourism Ireland and our 500 private sector businesses, our strategic and corporate partners and local community partners in the delivery of integrated and effective city marketing, sales and visitor servicing activity aimed at rebuilding city tourism to pre-pandemic levels.

Visit Belfast sales, marketing and visitor servicing across city break, cruise, group tour operator and business events includes a degree of destination management. Visit Belfast in its role as a DMMO is therefore well placed to support Belfast City Council in the delivery of key destination management functions in order to advance the City Council's ambition to **grow, position, experience** and **sustain** tourism across the city region and deliver three catalyst legacy projects which will see Belfast become a culturally vibrant and welcoming city.

The 2022-23 business and operational plan is fully aligned to the City's strategic priorities as set out in the Belfast Agenda, Inclusive Growth Strategy, Belfast Resilience Strategy, A City Imagining Cultural Strategy, and the *Make Yourself at Home* Future of Tourism Plan and also the Northern Ireland Tourism Recovery Plan, The Northern Ireland Business Tourism Strategy, Tourism NI's Republic of Ireland Market Strategy 2021-26 and the Northern Ireland 10X Economy Strategy. Using outcome-based accountability, Visit Belfast is clear in how its targets, KPIs and operations will contribute to the achievement of these city and national strategies and are in line with their ambitions of doubling tourism revenue by 2030.

The 2022-23 Business and Operational Plans aim to deliver £97m in the local economy, a return on investment of £27:1, supporting tourism businesses, sustaining local communities and creating social wellbeing by driving demand, creating bookings and welcoming visitors.