



visitBelfast **TOURISM** **STRATEGY**

**New Horizons for
Belfast City Region
2024-2027**



Belfast



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1. Executive Summary

Visit Belfast's New Horizons Strategy (2024-2027) has put the city on a path towards a regenerative future, positioning the visitor economy as a catalyst for positive economic, social and environmental impact. Year one has delivered significant progress, laying the foundations for further growth and innovation in 2025-26.

Globally, destinations are navigating waves of transformation driven by competing trends and shifting market dynamics. Extensive market research and analysis has informed this Year 2 business plan for 2025-26 and eight super trends have emerged:

- **Strong Tourism Demand vs. Climate Concerns:** While travel remains a top priority across all segments, this growth is tempered by increasing awareness of the climate crisis.
- **Diverging Consumer Behaviours:** Cost-of-living pressures are influencing consumer choice driving value for money, yet there's a simultaneous surge in premium and luxury travel.
- **Business Resilience Amid Rising Costs:** Hospitality and tourism businesses face escalating operational costs, though many continue to thrive through strategic investments in products and services.
- **Overtourism and Resident Sentiment:** Some destinations grapple with overtourism, while others, like Belfast, benefit from strong community support for tourism growth.
- **Sustainability vs. Value for Money:** Although sustainable tourism remains a pertinent factor, cost and perceived value remain dominant issues influencing destination selection.
- **Evolving Urban Tourism:** Cities are promoting neighbourhood tourism and regionality alongside iconic/hero attractions and the city centre to enhance the visitor experience and spread the benefits of tourism.
- **Seasonal Shifts:** Capacity constraints and high travel costs during peak seasons are driving increased demand for off-peak and shoulder season travel.
- **The Digital Frontier:** AI and digital transformation are reshaping how destinations engage with travellers, presenting both opportunities and challenges.

As Belfast's Destination Marketing and Management Organisation (DMMO), Visit Belfast is at the forefront of this transformation, carefully balancing the needs of public, private, visitor, and community stakeholders through strategic collaboration and agile delivery.

As we prepare for 2025-26, Visit Belfast is ready to navigate an evolving landscape shaped by post-pandemic recovery dynamics, economic headwinds, and shifting consumer behaviours. Our strategic approach is centred on promoting sustainable and regenerative travel experiences, forging local connections and driving economic growth. We will align our promotional activity with the values of a tech-savvy, value-driven consumer base, ensuring that our marketing initiatives resonate with the changing preferences of today's visitors. Visit Belfast will focus on promoting high quality, value driven packages that showcase the city's authentic offerings tapping into increased demand for shoulder season travel.

Younger generations, particularly millennials and Gen Z are leading the charge in the travel resurgence, favouring cultural immersion and authentic experiences. Our targeted marketing

campaigns will reach these demographics, utilising key segments identified by Tourism NI and Tourism Ireland, encouraging them to engage with Belfast's vibrant culture and local communities.

Key focus areas for 25-26:

- Growing demand by leveraging major events and infrastructure developments to enhance Belfast's appeal.
- Expanding year-round demand with a focus on shoulder season and midweek business.
- Capitalising on increased tourism demand for Belfast to spread the benefits of tourism across the city, within our neighbourhoods and wider region.
- Demonstrating sustainable leadership and innovation with greater measurable environmental and social impact.
- Promoting Belfast's emerging luxury and premium offer.
- Fostering extreme collaboration across industry partnerships.
- Driving growth and innovation through AI, digital and data-driven decision-making.
- Developing our people and next-generation talent within Visit Belfast and across our industry, ensuring our teams and partners are future-ready.

Conclusion

Visit Belfast is committed to delivering strong returns on investment through strategic marketing, sustainable growth initiatives and a collaborative approach that benefits residents, tourism businesses, funders and visitors alike.

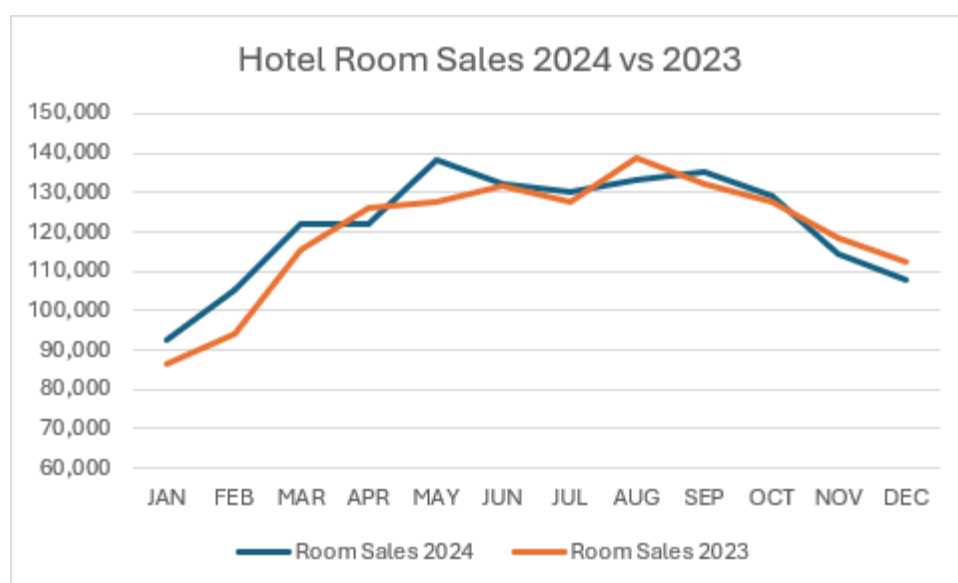
This year 2 business plan (2025-26) will be supported by **£1.9m** of commercial/project income which represents 41% of our projected budget. Visit Belfast's focus on short-breaks, business events, cruise and visitor servicing will deliver **857,328 visits, 450,000 bed nights** and **£141m** economic impact, representing a return on investment of **£30:1**.

2. City Region Performance 2024

Despite challenging operating conditions, the city region demonstrated a robust performance in 2024 with hotel, air passenger and footfall figures all ahead of 2023 levels.

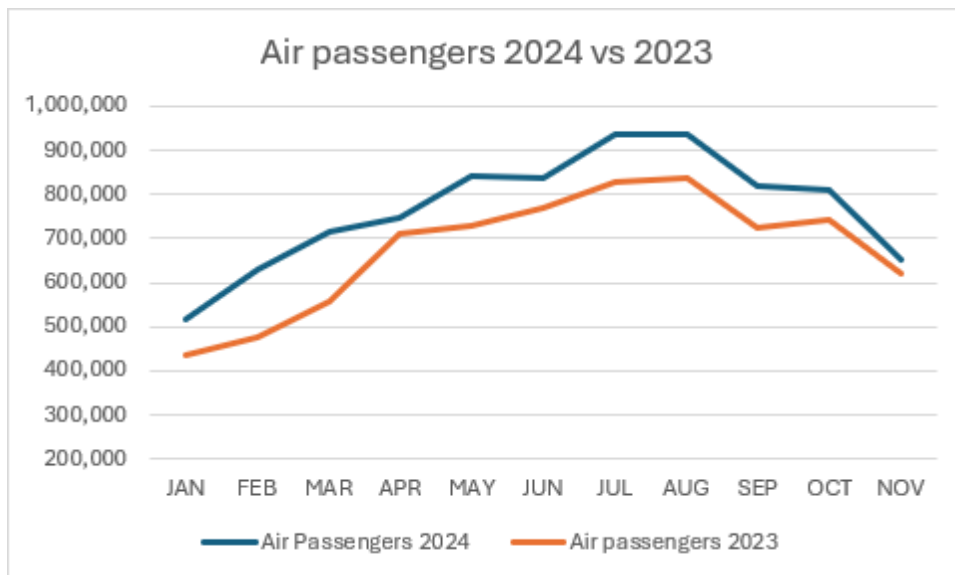
Hotel performance

1.46m hotel rooms were sold in Belfast during 2024, an increase of 1.5% on 2023. In 2024 Belfast hotel occupancy was 77.4% which was slightly behind 2023 levels (-1.1%) Crucially, revenue performance was particularly strong during the year with £168m achieved during 2024 an increase of 8.5% on 2023 performance. Inflation, rising operational and staff costs have continued to impact profit margins for some operators but overall, it has been a strong year for hoteliers. The city welcomed one new hotel in 2024, the Foundry hotel with hotel developments and expansions set to deliver between 700-1,355 additional rooms by 2027.



Air passengers and access

Both Belfast International Airport (BIA) and George Best Belfast City Airport (GBBCA) have delivered significant growth in passenger numbers during 2024. Between January and November, Belfast city region had 8.4m passengers across both airports which is an increase of 13.4% on 2023 levels without December pax included. Both airports made significant investments during the year with GBBCA completing a £3m investment in new screening technology to improve efficiency and passenger experience and BIA investing £25m of its' overall £100m investment plan.



City centre footfall

Despite significant challenges experienced in the city centre during 2024, footfall figures provided by Belfast One bid shows annual footfall performed ahead of 2023 by 2.7%. This performance held up throughout the year despite protests and unrest in August followed by traffic congestion and disruption in the October-December period. 2024 footfall is still -3.3% behind pre-pandemic performance highlighting the structural change that has taken place with hybrid working and changing consumer behaviour.



2024 Cruise, Business Events and Footfall Levels

There was a slight softening of business event economic impact, cruise visits and footfall during 2024 when compared to the record-breaking year of 2023.

- In 2024, Belfast hosted significantly more business events than 2023 (133 vs 94) and delegate numbers were on par with 2023. The mix of events in Belfast during 2024 however reduced economic impact performance YoY due to smaller, regional events taking place in the city when compared to 2023 which had more large-scale international events.
- Belfast welcomed 145 cruise calls bringing 259k passengers and crew during 2024. This is of course a strong performance, but cruise scheduling challenges impacted a number of bookings for 2024 when compared to the high-water margin of 2023 for cruise.
- Visit Belfast handled 701,800 enquiries during 2024 which is +3% on 2023 levels. While overall city centre footfall was ahead of 2023, visitor footfall was impacted by a softer Cruise season, not selling Hop on Hop off bus tickets and street sellers congesting the space outside the Visit Belfast Welcome Centre in the high season.

2023 Tourism Performance (NISRA)

2023 NISRA statistics highlight a buoyant post pandemic recovery. Northern Ireland welcomed an estimated 5.4 million overnight visitors, generating approximately £1.2 billion in revenue in 2023. This marks an increase from 5.3 million trips and £1 billion in revenue reported in 2019.

A significant contributor to this growth was the influx of visitors from the Republic of Ireland. In 2023, there were 1.3 million overnight trips from the Republic to Northern Ireland, a 46% increase compared to 2022.

Belfast, as the capital city and gateway to the region played a pivotal role in this resurgence. The city’s diverse attractions, cultural events, and hospitality offerings attracted a substantial portion of the visitors, bolstering its reputation as a premier tourist destination.

Belfast delivered £536m in tourism spend during 2023 which represents 44% of total tourism revenue for Northern Ireland in 2023 as shown below.

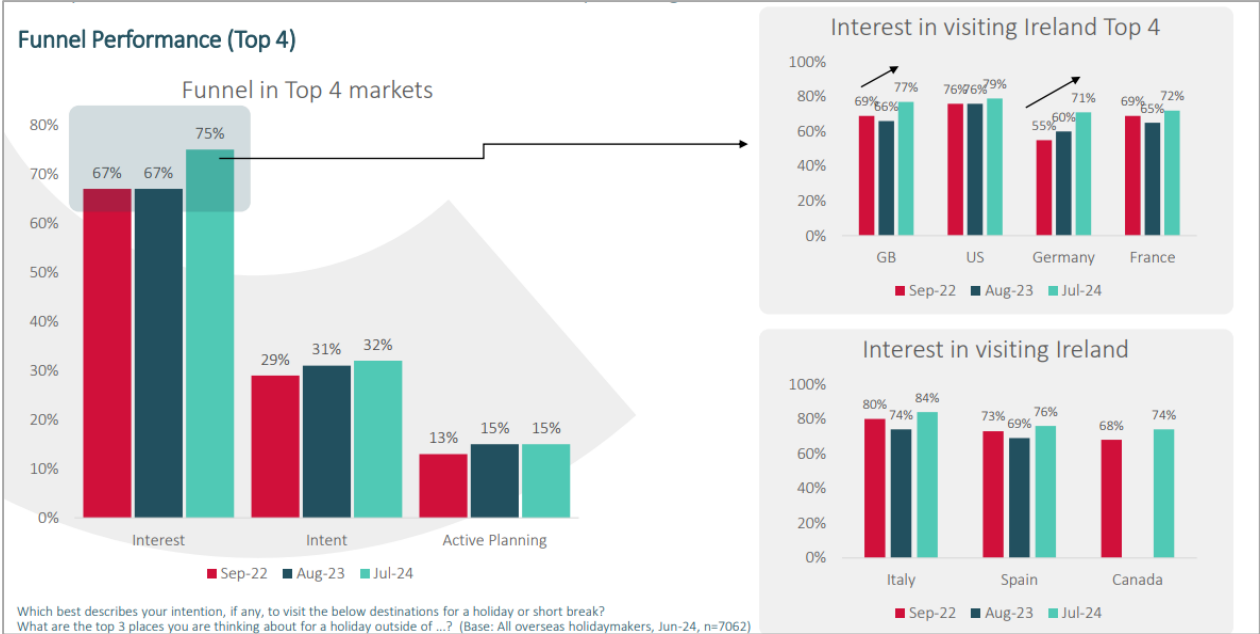
2023 Tourism Performance (NISRA)	Belfast	Northern Ireland	%
Total overnight trips	1,694,011	5,449,626	31
Total nights	5,076,144	16,501,794	31
Total spend (£)	£536,541,696	£1,211,812,613	44

Tourism sentiment 2024

In 2024 Tourism Ireland commissioned consumer sentiment research across all key source markets.

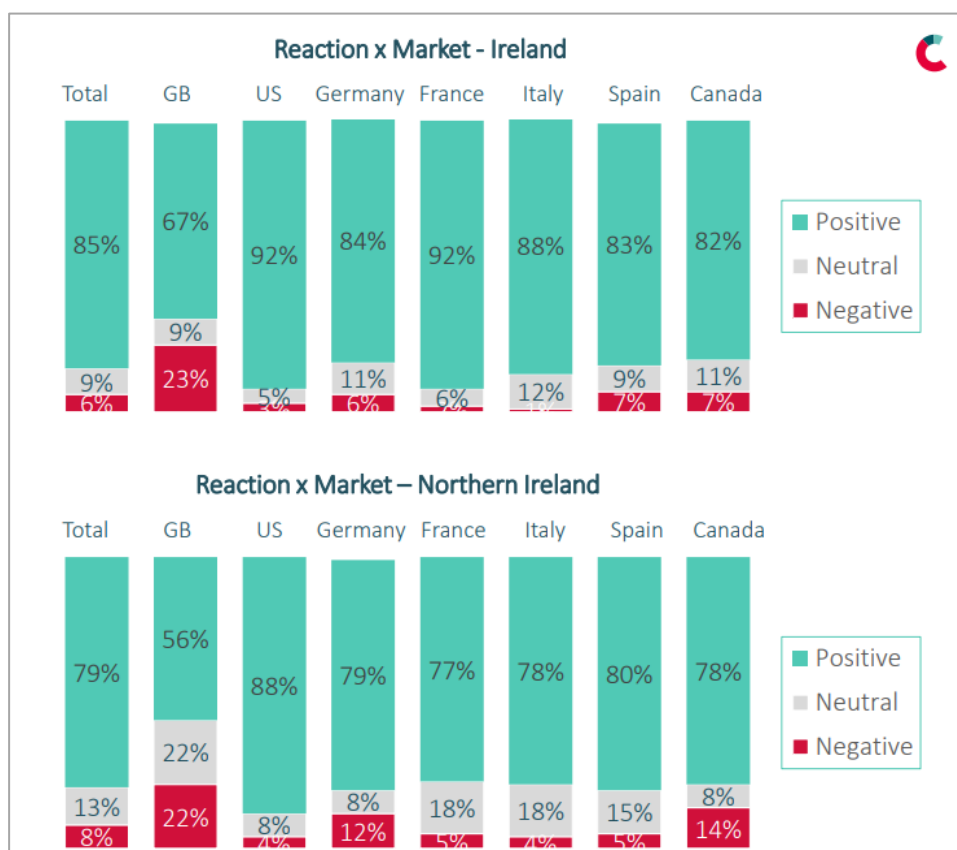
Interest in visiting Ireland has seen a significant increase since 2023. Ireland now ranks competitively with North European destinations. Interest, intent and active planning to visit Ireland have all increased. GB from 69% to 77%, US from 76 to 79% and Germany from 55% to 71%.

Figure 1: Interest in visiting Ireland vs competitor set



For those who have heard, seen or read any communications recently about the island of Ireland, the vast majority is positive, with GB more likely to have heard mixed communications. The graphs below show Northern Ireland's performance in key markets compared with the RoI which has significantly improved in recent years.

Figure 2: Communication profile by source market



The top three reasons for interest in visiting Northern Ireland were beautiful landscapes and scenery, never been before/somewhere new and great culture. The table below shows the breakdown by key source market and highlights the opportunity.

Figure 3: Reasons for interest in visiting Northern Ireland by source market

Why planning to visit Northern Ireland? (among those planning in next 6 months/12 months/3 years/in future)

Northern Ireland	Beautiful landscapes and scenery	Never been before / somewhere new	Great culture	I like Northern Ireland / It interests me	Rich history	Go sightseeing/ tourist attractions	Family and friends there
Total	28%	19%	10%	8%	8%	6%	4%
GB	14%	24%	5%	2%	5%	15%	12%
US	22%	18%	12%	9%	10%	6%	2%
Germany	35%	17%	7%	13%	7%	4%	1%
France	39%	17%	11%	6%	7%	3%	2%
Italy	31%	20%	8%	14%	6%	3%	1%
Spain	33%	22%	13%	8%	8%	4%	1%
Canada	23%	18%	11%	4%	11%	6%	7%

3. Visit Belfast Performance 2024-25

Visit Belfast's *New Horizons for Belfast City Region 2024-2027* aims to:

- **Grow** the value of tourism to the Belfast city region and its communities
- **Position** the Belfast city region as a must-see destination for leisure and business tourism
- Enhance the **experience** for visitors by showcasing the Belfast city region as a diverse and welcoming destination with iconic attractions, authentic experiences and a unique neighbourhood offer
- **Sustain** its approach to championing sustainability, pioneering impactful initiatives, inspiring sustainable choices amongst visitors and clients and telling Belfast's sustainability story.

The strategy set out ambitious targets to deliver 20% growth and cumulative economic impact of £424m to the city region between 2024-2027. This represents a return on investment of £30:1.

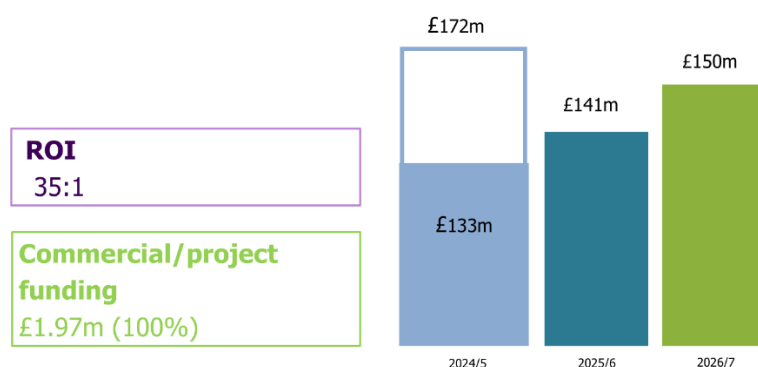
Year one progress (2024-25)

Visit Belfast's focus in year one of the New Horizons strategy was to achieve an economic impact target of £133m through leisure tourism marketing, business events, cruise and visitor servicing activity while adopting a new 'triple-bottom line' approach to measure the environmental and social impact of tourism for Belfast.

To support its ambitious growth plans, Visit Belfast secured commercial income £1.97m. As a not-for-profit, public-private sector partnership, the more commercial income and investment that Visit Belfast can secure for destination marketing and management, the greater impact it can deliver for its industry and the city region.

Visit Belfast delivered a very strong year one performance in 2024-25 achieving £172 economic impact with all KPIs achieved or exceeded. This is illustrated in figure 4 and figure 5.

Figure 4: 2024-25 Performance summary (Year one of strategy)



Note - £41m leisure tourism economic impact uplift delivered by VB as a result of additional funding support for Belfast 2024 campaigns.

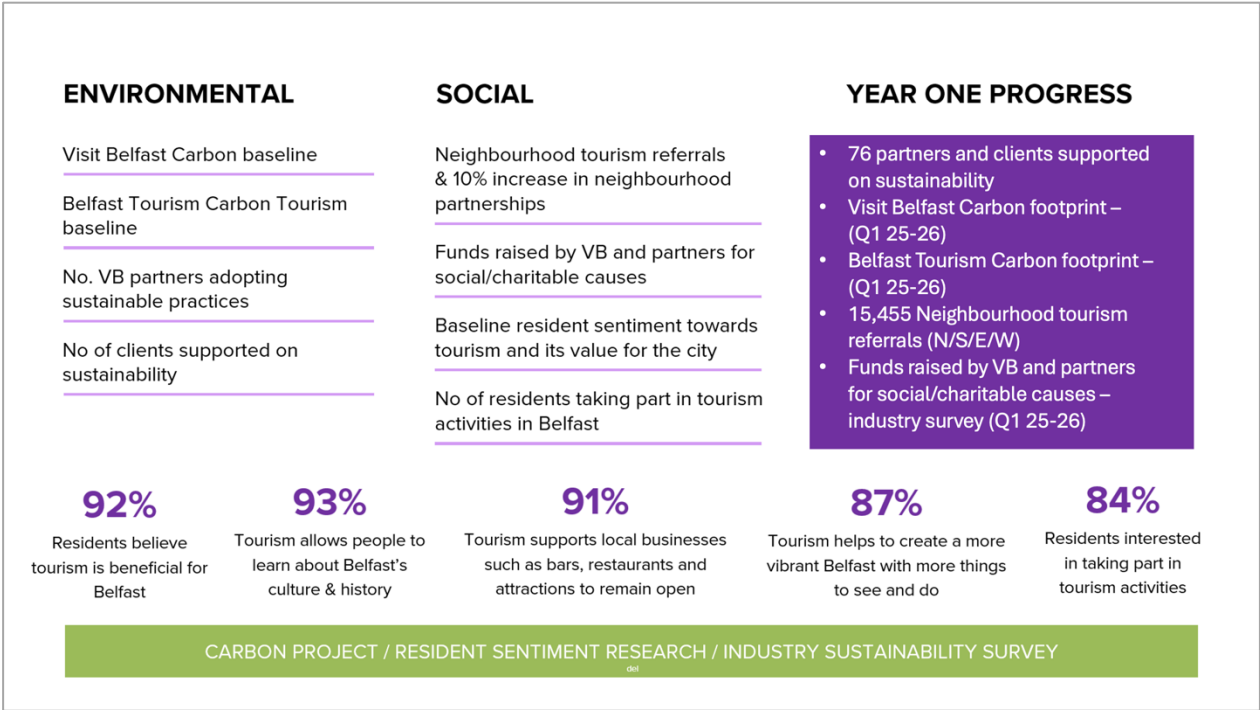
Value for Money

Visit Belfast is committed to driving efficiencies and providing value for money for our partners and funders. Over the last three years (22-25) as Visit Belfast’s costs have increased by 14%, we have driven commercial income by 53% to support the rising cost base as we acknowledge public sector budget challenges. Overall economic impact has grown year on year demonstrating value for money and increased productivity with an ROI in that three-year period of £32: £1.

Triple-bottom line approach

In accordance with the principles of sustainable tourism, Visit Belfast embraced a ‘triple bottom line’ approach to its 3-year strategy with the inclusion of environmental and social impact KPIs in its business plan. The priority for year one of the strategy in 2024-25 was to establish baseline measures across a number of environmental and social KPIs that would inform year 2 and 3 KPIs.

Figure 5: Triple bottom line KPIs and 24-25 progress



Key highlights and outcomes aligned to each of the strategy pillars are set out below:

Grow

The value of tourism to the Belfast City Region and its communities:

- £102m delivered from Visit Belfast enhanced marketing seasonal and event campaigns.
- £35m economic impact in business events delivered through over 110 wins.
- £18m cruise economic impact delivered through 145 cruise calls bringing 259,376 passengers and crew to the city region.
- £17m economic impact through visitor servicing activity.
- 720,815 bednights delivered across leisure tourism and business events.
- 701,800 enquiries handled across 4 visitor servicing sites.
- £1.97m commercial/project income delivered.

Position

The destination as a must-see destination for leisure and business tourism:

- Belfast is ranked in the Top 50 cities in the world for 2025 - Time Out Magazine.
- Web visitors are expected to achieve 2.2 million unique visitors by end of year.
- Social media engagements have already increased by 20% and are expected to reach a record high of 7m.
- Visit Belfast delivered over 300+ unique social videos featuring Belfast and achieving over 43 million video views.
- Press and influencer activity achieved an estimated 150m opportunities to see.
- Belfast is the 'Best Events Destination' in the UK for the 3rd consecutive year (C&IT Awards).
- Visit Belfast is the 'Best Convention Bureau' globally for a second year as awarded by MICEBOOK.

Experience

Enhance the visitor experience and showcase Belfast City region 's iconic attractions, authentic experiences and unique neighbourhood offer:

- Neighbourhood tourism promotion embedded across the organisation as a key focus, Year 1 action plan developed and delivered.
- 15,455 North, South, West and East neighbourhood referrals generated by VBWC Belfast in 2024-25.
- New VIC presence established at Belfast's new Grand Central station.
- Awarded the best Tourist Information Centre in Northern Ireland for the 20th year for visitor servicing (NI travel news).
- 94% Visitor satisfaction.
- 100% of event organisers supported by Visit Belfast said that they would be likely or highly likely to recommend Belfast as a conference/business events destination.

Sustain

Accelerate work on sustainability, pioneering impactful initiatives and telling Belfast's sustainability story:

- Belfast was ranked in the top 10 destinations globally for sustainability in the 2024 Global Destinations Sustainability Index ranking 9th / 100 cities. Belfast is now the highest performing destination in the UK and Ireland.
- Top 20 sustainable destinations for 2024 – Forbes.
- Top 10 sustainable destinations for 2024 – TripAdvisor Travellers Choice Awards.
- Belfast's first resident sentiment survey towards tourism was led and delivered by Visit Belfast which showed a very strong support for tourism with 92% of residents believing that tourism is beneficial for Belfast.
- Visit Belfast has undertaken the first destination carbon footprint model for tourism and events in the UK and Ireland.
- Supported the Belfast Sustainable Venue Forum led by ICC Belfast to launch the first multi-venue re-usable cup pilot project to remove 2m single use plastic cups from Belfast entertainment venues and reduce 40 tonnes of carbon.
- Secured a Green Tourism Gold accreditation for Visit Belfast.

4. Tourism Outlook and Policy Context

Tourism Outlook

2024 was the year of consolidated global tourism recovery

According to the UNWTO, International tourism virtually recovered (99%) pre-pandemic levels in 2024, with most destinations exceeding 2019 numbers. 2024 marked the consolidation of international tourism recovery from its worst crisis ever, four years after the outbreak of the COVID-19 pandemic.

An estimated 1.4 billion international tourists (overnight visitors) were recorded around the world in 2024, an increase of 11% over 2023, or 140 million more.

Total export revenues from tourism (including passenger transport) are estimated at a record USD 1.9 trillion in 2024, about 3% higher than before the pandemic and 4% more than in 2019 (real terms).

Optimism and global growth for 2025

International tourist arrivals are expected to grow 3% to 5% in 2025 compared to 2024, according to preliminary estimates from the UNWTO.

The positive outlook for the sector is reflected in the latest UN Tourism Confidence Index, with a score of 130 for 2025 (based on a scale of 0 to 200, where 100 equals similar performance).

64% of UN Tourism Panel of Experts indicate 'better' or 'much better' prospects for 2025 compared to 2024.

Local tourism ambition

In January 2025, the Department for the Economy's Tourism Vision and 10-year action plan was launched with the strategic goal that overnight visitors to Northern Ireland will exceed £2bn by 2035. This target is ambitious but achievable. 56% of the regions current £1.2bn tourism revenue comes from international visitors.

Tourism Ireland's target is to grow overnight visitor revenue by 6.5% each year until 2030. 44% of current tourism revenue comes from domestic visitors (split 50:50 between the North and South). Tourism NI estimates that expenditure from these markets can grow by 36% meaning that overall expenditure from the island of Ireland could exceed £700m by 2035.

In November 2024, NISRA for the first time published an estimate on day trips taken in Northern Ireland. It showed that in the twelve months to March 2024, there were an estimated 16.3m day trips taken with an associated £1.1bn spend.

The Belfast Agenda sets out the aim of increasing the value of tourism in Belfast from £417m in 2019 to £800m in 2030.

Cruise Belfast commissioned Oxford Economics to assess current and future cruise demand for Belfast. Some Key insights revealed in the study include:

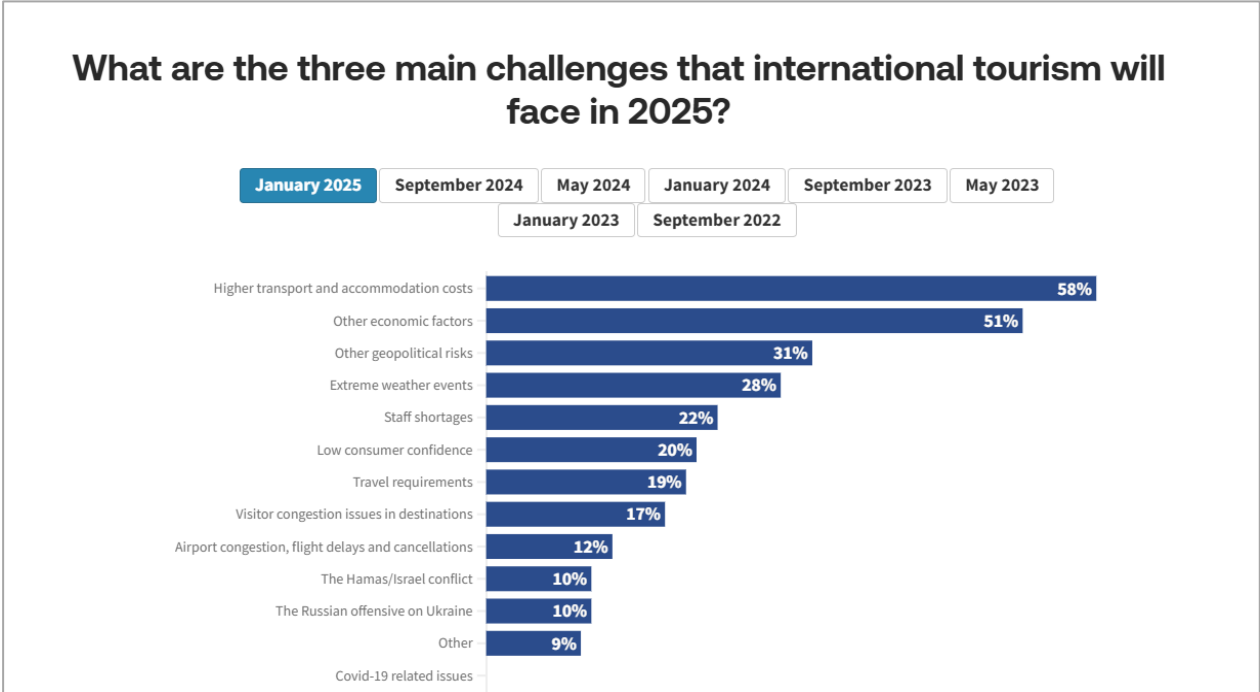
- Cruise is projected to be the fastest-growing travel sector globally over the next five years.
- Global cruise demand will outpace other international travel, with an annual growth rate of 2.7% (compared to 2.2%).
- Oxford Economics forecasts a 100% increase in cruise-related direct spending for Belfast and Northern Ireland from £23m in 2025 reaching £39.3m by 2035 and £56.2m by 2050.

Navigating economic and geopolitical challenges

Despite the positive outlook for tourism in 2025 and increasing confidence levels, the industry has to continue to navigate economic and geopolitical headwinds. The visitor economy locally operates within a broader global context.

Research by the UN global tourism panel highlighted the main three challenges impacting confidence levels in 2025 as higher accommodation and transport costs, other economic factors and geopolitical risks.

Figure 6: UN Global Tourism Panel Confidence (Jan 2025)



Locally, the socio-economic impacts of the global pandemic continue to resonate in Belfast, Northern Ireland and beyond. The city has charted a strong recovery, yet challenges such as staffing, higher costs of doing business within the tourism and hospitality sector and the knock-on impact on hospitality opening hours in the city remain.

Cost of doing business

The economic challenges posed by inflationary growth, coupled with the soaring cost of living rises have been felt by both industry and consumers. This was further compounded with the recent UK budget which brought significant changes to employer National Insurance Contributions (NICs). UKHospitality has reported that its sector will be hit hardest, due to the high number of employees working part-time or flexibly.

Currently, more than 1.2 million hospitality staff in the UK are not eligible for employer NICs. In April 2025, that number will be reduced to 450,000 people. More than 774,000 workers will be newly eligible for employer NICs which is expected to cost the hospitality sector £1 billion.

Combined with £2.4 billion of other costs hitting in April, businesses are already taking hard decisions to cut investment, freeze recruitment, cut jobs, reduce hours or increase prices.

Cost of living

Continued pressures on household incomes have put pressure on discretionary spending among consumers on hospitality and leisure, particularly in the domestic market, highlighting the importance of tourism growth to sustain these businesses.

Climate Change

There is growing pressure on governments and businesses to prioritise environmental sustainability and achieve net-zero targets. The rise of conscious travel is also influencing destination preferences amongst independent travellers. With international visits (outside the island of Ireland) necessitating access by air or sea and the growing concerns around sustainability this remains an important macro level market reality for Belfast as a city destination.

Geopolitical Instability

While Northern Ireland has benefited from the restoration of the executive in the past year, geopolitical issues globally may impact consumer confidence from European and international markets.

Consumer Demand

The travel industry continues to experience a notable resurgence, with consumers eager to explore once more with an undaunted appetite for new travel experiences. The global economic landscape, rising living costs and inflation are influencing consumer spending habits, as visitors seek more value for their money. Younger generations, particularly Millennials and Gen Z, are leading the charge in the travel resurgence, favouring cultural immersion and authentic experiences.

Consumer demand trends that are particularly relevant to Belfast's key target markets (namely, NI, ROI, GB, direct access markets in Europe and the USA) are summarised below.

Opportunities

- Balancing a longer holiday with short, shoulder season breaks: As reported by Tourism Ireland, cost of living pressures are leading consumers to concentrate leisure breaks into one extended holiday in the summer and complemented by 1-2 short breaks in the shoulder season.
- Growing demand for off-peak travel: Travalyst's 2025 travel trends report highlights that online searches for May-Jun are now 50% higher than for Jul-Aug. Furthermore, 45% of consumers are now more likely to travel off-peak to secure greater value.
- Extreme weather conditions impacting travel patterns and destination selection: As a result of extreme weather conditions experienced in parts of Europe and USA a seismic shift has taken place in booking patterns. Travalyst research shows that 73% of Europeans plan to travel between Oct '24 and Mar '25 compared to just 6% during the same period in 2024 highlighting a major shift.
- Destination Dupes and 'Not hot lists': New trends such as the Intrepid travels annual 'not hot list' is making it cool for consumers to go beyond what's familiar and explore less well known and undiscovered destinations.
- Seeking frequent escapes from stress and monotony: For many, the news cycle, turbulent politics and digital overload mean that leisure time is dedicated more than ever to digital detox, rekindling social connections and engaging in activities which are fun and immersive.
- Focused on physical and mental wellbeing: The pandemic heightened consumers' awareness of maintaining both physical and mental health. These issues have become especially important for young consumers, who are shunning alcohol consumption and hedonism in greater numbers, in favour of good diet and exercise. Travalyst's 2025 travel trends research reports that 52% of consumers believe they'll be healthier in the next 5 years and increasingly these behaviours are being carried across holidays and trips.
- Continued rise of experiential tourism: Online bookings of experiences are growing three times the rate of hotel and airline bookings according to AirBnB experience research.
- Luxury Market: With the luxury travel market projected to grow rapidly, Travalyst travel trends research highlights that almost half of UK Gen Z travellers stay in 5* hotels, up from 40% in 2024.
- Travel meets AI: We can expect to see technology start to play a larger role in trip planning. flight-free holiday firm Byway, which has created its own proprietary AI engine to take the complexity out of timetables and multi-country travel, solving a significant problem when it comes to European travel. Other firms, including Tripadvisor, are employing generative AI to help build itineraries for trips, while a growing number of airports are ditching paper tags and using the technology to sort baggage more efficiently. At Hyatt hotels, an AI-powered bed can monitor your heart rate, movement and blood pressure to offer more comfort and a better night's sleep. But it's not all positive for technology. According to research from ABTA association of travel agents and tour operators, a Gen Z traveller is now almost as

likely to be flicking through a holiday brochure for travel inspiration as browsing the internet for ideas, hinting that the trend towards tech is not universal.

- City breaks are back in fashion: While many consumers sought to avoid cities during the pandemic, city breaks are now back as a favourite choice, particularly among visitors from NI, GB and ROI.
- Keen to meet the locals: Meeting local people in the places where they spend time is a key priority among travellers who see this as the best way to uncover what is most unique and authentic about the places they're visiting. As a result, cities across Europe are connecting visitors with their neighbourhoods as part of broadening their appeal and encouraging longer stays.
- Conscious spenders who expect action on sustainability: As evidence of climate change and biodiversity loss mounts year on year, consumers expect businesses and governments to take meaningful action on these issues and help them in making changes to their own individual behaviour by making sustainable options cheaper.
- Unique Food and Drink Experiences: Visitors motivated by culinary experiences tend to stay longer and spend more, enriching destination's visitor economies and creating opportunities for local communities and businesses.
- Bleisure and Multi-generational Travel: In addition, the rise of multi-generational and "bleisure" travel presents an opportunity for destinations to develop promotions that cater to families and professionals seeking a balance between work and leisure, encouraging extended stays and wider exploration of the city.

Policy Context

As a not-for-profit public, private and community partnership, Visit Belfast places significant importance on the policy context within which we operate. The strategies illustrated below have informed and will continue to influence Visit Belfast's plans as it supports growing city region tourism over the lifespan of the three-year New Horizons strategy (2024-27).

Figure 7: National and City Policies informing Visit Belfast's strategy and business plan



City Context

The city's community plan, the **Belfast Agenda (2023-2027)** and **BCC's corporate plan** sets out a joint vision and long-term ambitions for Belfast's future, as well as outlining priorities for action over the next four years. This plan sets the vision for Belfast to be a culturally vibrant city where people love to live and dream to visit. The vision, outcomes and ambitions of The Belfast Agenda are intended to improve the lives of everyone in Belfast in the long-term through five strategic themes: *Our People, Our Economy, Our Place, Our Planet, and Compassionate City*.

Through this strategy, Visit Belfast will continue to support Belfast City Council to develop the city's 'welcoming, vibrant neighbourhoods' by promoting our diverse city areas and maximising the benefits of tourism to communities across the city (Our People) and creating a more liveable, connected, and vibrant city (Our Place). Showcasing Belfast as a vibrant and welcoming city offering local and authentic experiences accessible to all (Compassionate City). We will also continue to support the tourism sector in building an innovative, sustainable, and inclusive tourism industry by promoting and facilitating access to training schemes and certification (Our Economy) and we will continue to lead innovative initiatives to support all stakeholders' efforts in creating a more sustainable, nature-positive city (Our Planet).

Visit Belfast will also continue to be a key delivery partner for Belfast City Council's '**Make Yourself at Home**' 10 Year Plan for Tourism in Belfast. We endorse and support these strategic principles of being people-centred, responsible and sustainable: increasing the benefits of tourism for visitors and the local people, businesses and neighbourhoods, to affect positive change in support of a visitor economy that will effectively serve the city and the region, and aligned to economic, social and environmental sustainable development goals.

This long-term plan is about realising Belfast's potential to become a leading cultural visitor destination and maximising the city's role as a gateway for Northern Ireland and beyond. The plan also places community at its heart. To demonstrate our unwavering commitment to this strategic approach to tourism in Belfast, we have aligned this three-year strategy around the strategic pillars identified in Make Yourself at Home: **Grow, Position, Experience** and **Sustain**. We will continue to ensure that tourism in Belfast provides a positive net benefit for the city and continue our efforts to improve the sector's sustainability practices.

The Belfast Agenda commits the city "to tackling climate change and biodiversity loss head on" while the 'top five things people want for Belfast 2035 includes desire for Belfast to be a "vibrant, attractive, connected and environmentally sustainable city", with carbon emissions reduced by 66% by 2025 and 80% by 2035. Visit Belfast will continue to support Belfast City Council in driving ambitious sustainable tourism plans and in showcasing Belfast as a sustainable city by actively promoting sustainability initiatives across Belfast (both in the city centre and in the neighbourhoods) to visitors and residents.

In January 2025, **Belfast Harbour's Advance Regional Prosperity 2025-2029** strategy outlined a comprehensive plan to enhance the ports infrastructure, support economic growth and contribute to environmental sustainability. The strategy included a transformative investment programme worth £313m which is entirely self-funded. This includes £90m investment in a new deepwater quay to accommodate the world's largest cruise vessels and expanding capacity for offshore wind turbine assembly and installation. Stage one is expected by 2027-28 which provides critical infrastructure required to deliver sustain and further grow cruise tourism to Belfast.

National Context

In January 2025, the Department for the Economy (DfE) launched a **Tourism Vision and Action Plan** to grow the sector over the next 10 years. The plan sets a Strategic Goal that tourism expenditure from overnight visitors will exceed £2 billion by 2035 from a baseline position of £1.2bn in 2023. Core Objectives set out in the plan include:

- Sustainable Growth: Develop a thriving tourism industry that enriches local quality of life and establishes Northern Ireland as a year-round destination.
- Authentic Experiences: Capitalise on the region's unique landscape, heritage, culture, and hospitality to offer genuine and memorable visitor experiences.
- Inclusive Economic Development: Ensure that tourism growth delivers sustainable and inclusive economic, social, and environmental benefits across all regions.

The action plan includes 17 critical actions to deliver its objectives including:

- Destination Stewardship Plans: Develop tailored plans for various destinations to manage and promote tourism sustainably.
- Industry Collaboration: Establishment of a Tourism Partnership Board to advise and support the development and implementation of the action plan which Visit Belfast is represented on.
- Marketing Initiatives: Launch targeted marketing campaigns to showcase Northern Ireland's attractions in international markets, aiming to double overseas tourism revenue by 2035.

- Visitor experience: expand visitor experience portfolio through the development and promotion of peace tourism.
- Business events: Delivery of the NI business events strategy to maximise the economic potential of business events and incentive travel by boosting Northern Ireland's overall share of the MICE market including attraction international conferences in key economic sectors.

The new tourism vision and action plan is shaped by the Department for Economy's sub-regional economic plan and economic vision which has four strategic priorities. The Visit Belfast Board met with the Economy Minister in December 2024 to set out how Visit Belfast's strategy is aligned to DfE's economic plan, and this is summarised below:

Productivity

- Marketing activity focused on expanding year-round demand.
- Business eventing drive high spend, midweek and year-round visitors.
- Utilising business events to deliver economic development, research and education objectives as well as showcasing the North as a place to live, work, study, do business and invest in.

Regional balance

- 47% of cruise visitors are NI-wide, 30% of Visit Belfast partners are outside of Belfast and 32% of all tourism enquiries handled by Visit Belfast are NI-wide.
- Visit Belfast established a Regional Tourism Partnership 20 years ago with bordering local authorities Lisburn and Castlereagh City Council & Ards and North Down Borough Council which has provided a strong foundation for regional collaboration and growth.
- Visit Belfast creates the opportunity for regional partners to access increased cruise, business, leisure visitors to Belfast.
- Highlighting Belfast's gateway role supports visitor demand for combined urban/rural experiences.
- Increasing regionality supports extended length of stay, increased spend and repeat visitors.

Net-zero

- Belfast is ranked 9th/100 global destinations for sustainability in the GDS Index (2024).
- 76% of Belfast hotel bedrooms have a third-party sustainability certification.
- Visit Belfast has adopted a triple bottom line approach to KPIs in new strategy.
- Belfast tourism carbon footprint model.
- Supporting industry partners to accelerate action on sustainability.
- Using Visit Belfast's 350m visitor touchpoints to drive responsible action - active travel, eco-tourism, sustainable experiences.
- Increasing the positive social impact of tourism for communities through neighbourhood tourism development and raising funds for social/charitable causes.
- 92% of residents believe tourism is beneficial for Belfast providing a strong social license to operate and indicative of positive impacts of tourism locally.

Tourism Investment and Development

The outlook for tourism in Northern Ireland, and in Belfast in particular over the coming decade is very positive. The Department for the Economy, Tourism Ireland and Belfast City Council have all set out strategic objectives of increasing the value of tourism in Belfast and landmark events and tourism investment is set to take place in the coming years.

- **Major events:** Northern Ireland is to host a series of major events and festivals, which are expected to drive a large increase in visits to the city, these include Oireachtas na Samhna 2025, The 153rd Open Championship 2025 and the Fleadh Cheoil 2026/2027. The Fleadh Cheoil is set to be the largest ever event held in Belfast attracting over 600,000 visitors per year.
- **Increased hotel room supply and development:** between 700-1,355 rooms are likely to be added to Belfast’s room stock in between 2025 – 2027.
- **Landmark tourism investment:** through the Belfast Region City Deals are set to further enhance the visitor offer including Belfast Stories, Bangor Waterfront and Destination Royal Hillsborough amongst others. In addition, Belfast City Council also revealed plans for a £100m development of Giant’s Park which is likely to be open as early as 2027.
- **Connectivity and experience:** the recent opening of Belfast Grand Central Station has provided hourly connectivity from Dublin into Belfast and provides a real opportunity for further growth in the ROI market as well as improving connectivity for international visitors arriving into Dublin. Belfast International and Belfast City Airport have both made significant investments to enhance the passenger experience.

Key opportunities and challenges for 2025/26 are summarised below:

2025/6 Outlook: Opportunities			
MAJOR EVENTS	STRATEGY	INVESTMENT	GROWTH
153rd Open	NI Tourism Action Plan	+700 - 1355 rooms	ROI, GB & US
Oireachtas na Samhna	Neighbourhood tourism	New openings	Peace Tourism
Fleadh Cheoil na hEireann	BRCD projects & regionality	Grand Central Station	Food and drink tourism
	LCC Tourism Strategy	D3 Cruise Hub & growth	Premium/luxury offer
	NI travel trade strategy		

2025/6 Outlook: Challenges

ECONOMIC

Cost of doing business

Cost of living

Belfast costs for visitors

Public finances & funding

POLICY

ETA roll out

Regional Balance

Green Claims Directive

INFRASTRUCTURE

Hotel capacity (peaks)

City centre congestion

Air connectivity

Transport & nighttime economy

Coach parking

EXPERIENCE

Staffing & service levels

Anti-social behaviour & poverty

Welcome - hop-on/hop off

Conclusion

The analysis of tourism trends, market sentiment, policy context and performance indicators underscore the huge opportunity for growth in the year ahead, despite economic headwinds. As visitors increasingly seek unique and inspiring experiences, Belfast is uniquely positioned to meet this demand through its rich history, vibrant culture, hospitality, iconic attractions and emerging neighbourhood offer.

Significant investment in major events, increased hotel room supply and tourism infrastructure, including Belfast Region City Deal projects, Grand Central Station and Cruise hub futureproof the city's appeal in both international and domestic markets.

As markets look for greater value, Belfast can capitalise on the shift towards Tier 2 destinations. Targeting priority growth segments including young professionals, couples, families, cruise and business delegates through focused innovative marketing campaigns and business development activity will drive ambitious growth targets.

We will utilise a digital led, innovative approach to highlight Belfast's unique offerings, neighbourhoods, luxury, events and festivals, and strengthen the city's reputation as a premier business, leisure and cruise destination.

Emphasising sustainability in tourism practices will resonate with the growing segment of environmentally conscious travellers, reinforcing Belfast's commitment to responsible tourism. In addition, Visit Belfast will focus on promoting high-quality, value-driven travel packages that showcase the city's authentic offerings, particularly during the shoulder seasons.

Our targeted marketing campaigns will reach these demographics, utilising the key segments identified by Tourism NI (TNI) and Tourism Ireland (TI), encouraging them to engage with Belfast's vibrant culture and local communities.

5. Visit Belfast Strategic Framework (2024-27)

Visit Belfast's key strategic priorities for the 3-year strategy (2024-2027) have been structured to reflect the four key strategic pillars of Belfast City Council's Make Yourself at Home 10-year tourism strategy and serve as a strategic framework to guide the 2025-26 business plan.

Strategic Pillar 1 – Grow		
Visit Belfast will grow the value of tourism to the Belfast city region and its communities.		
How will we do this?		
We will capitalise on the strong post-pandemic recovery of city breaks and increase the value of overnight stays and day trips from NI, ROI and GB markets, prioritising midweek, shoulder season and winter months. In addition, Visit Belfast will focus on direct access cities within Europe and capitalising on increased US market via Dublin.		
Data driven decision making and collaboration	Grow the value of business events to Belfast and NI	Grow the value and increase the profile of tourism to the city region
Strategic Pillar 2 – Position		
Visit Belfast will position the Belfast city region as a front of mind destination for leisure visits, business events.		
How will we do this?		
We will be ambassadors for the Belfast brand, proudly celebrating the city’s energy, authenticity and vibrancy whilst strengthening Belfast’s unique position as the gateway to discovering Northern Ireland.		
Enhance perceptions of Belfast	Maximise destination reach, profile & influence	Develop and nurture city and regional partnerships
Strategic Pillar 3 – Experience		
Visit Belfast will enhance the experience for visitors by showcasing Belfast city region as a diverse and welcoming destination with a unique neighbourhood offer and iconic attractions.		
How will we do this?		
We will work strategically with partners across the city region to develop and curate experiences in Belfast’s neighbourhoods and nearby coastal and rural areas, in order to connect visitors with the authentic and unique experiences that the city region offers.		
Support development of neighbourhood tourism across the city	Maximise opportunities to enhance Belfast’s experiential offer through visitor servicing and industry support	Embrace emerging technologies and innovations including AI to enhance the destination offer
Strategic Pillar 4 – Sustain		
Visit Belfast will accelerate its approach to championing sustainability, pioneering impactful initiatives, inspiring sustainable choices amongst visitors and clients and telling Belfast’s sustainability story.		
How will we do this?		
We will intensify efforts to improve Belfast’s competitive position as a renowned sustainable destination and find creative ways to tell the city’s sustainability story, engaging visitors and local businesses to engage in sustainable tourism practices.		
Be industry champions sustainability initiatives across Belfast	Ensure Visit Belfast and Belfast leads by example	Tell Belfast’s sustainability story and champion responsible tourism

6. 2025-26 Targets & Headline KPIs

The table sets out Visit Belfast's headline key performance indicators (KPIs) for 2025-26 aimed at recording our overall impact on the city's visitor economy, its environments and communities. These are supplemented with detailed departmental KPIs, and operational plans set out in section 7.

Impact	Headline KPIs	Measurement
Economic	857,328 visits	<ul style="list-style-type: none"> • Cruise 320,328 • Daytrips 250,000 • Overnight leisure trips 250,000 • Delegates 37,000
	450,000 bed nights	<ul style="list-style-type: none"> • 350,000 leisure, 100,000 business
	£141m contribution to the city's economy	<ul style="list-style-type: none"> • Leisure £62m • Business events £37m • Visitor servicing £19m • Cruise £23m
	805,000 Visitor enquiries	
Environmental	Visit Belfast Carbon Baseline	<ul style="list-style-type: none"> • Results due Q1 2025-26
	Belfast Tourism Carbon baseline	<ul style="list-style-type: none"> • Results due Q1 2025-26
	Visit Belfast partners adopting sustainable practices	<ul style="list-style-type: none"> • Results due Q1 2025-26 (industry survey)
	100 clients and industry supported on sustainability	
Social	92% residents say tourism is beneficial for Belfast	<ul style="list-style-type: none"> • Resident sentiment survey
	84% of residents interested in taking part in more tourism activities	<ul style="list-style-type: none"> • Resident sentiment survey
	10% increase in number of neighbourhood tourism partnerships	
	17,000 North, South, East, West Enquiries	<ul style="list-style-type: none"> • Year 1 baseline – 15,455 NSEW enquiries • Neighbourhood tourism referral tracking project under development.
	Funds (£) raised by VB and partners for social / charitable causes	<ul style="list-style-type: none"> • Results due Q1 2025-26. Industry survey to inform baseline.

7. Departmental Operational Plans 2025–2026

7.1 Marketing and Communications

Approach 2025-26

The 2025-26 MarComms strategy for Visit Belfast will build on the year one elements of the "New Horizons" strategy (2024-27). This year's focus is on deepening neighbourhood engagement, enhancing sustainable practices, elevating its food and drink reputation and promoting Belfast as a vibrant, inclusive destination that celebrates its unique cultural and historical assets while positioning among top European destinations of distinction. We aim to align our promotional activities with the values of a tech-savvy, value driven consumer base, ensuring that our marketing initiatives resonate with the changing preferences of today's visitors.

By leveraging the city's rich tapestry of experiences, Visit Belfast aims to foster authentic connections between visitors and the wider city area, ensuring that the benefits of tourism are felt widely across the city, its neighbourhoods and the region. Key will be increasing self-generated income and funding streams that support our marketing activities and outputs.

Guiding Principles

Prioritising Authentic Experiences

Visit Belfast will continue to emphasise the importance of authentic experiences that resonate with both visitors and locals. By highlighting distinct areas and the diverse stories of Belfast's neighbourhoods, the marketing efforts will deepen visitor engagement and foster appreciation for the city region's unique cultural tourism landscape. This will continue to build on the positioning achieved because of Belfast 2024, events and promotion.

Building Trust and Transparency

The foundation of Visit Belfast's communication strategy will remain focused on our key values including trust and transparency. By providing accurate, timely, and relevant information, Visit Belfast aims to strengthen its reputation as a reliable source of all information for visitors. This commitment will support our visitor services delivery, and enhance the overall visitor experience, dispersion and encourage longer stays.

Strategic Partnerships

Collaborating closely with main funder Belfast City Council (BCC), our members and partners, Tourism Northern Ireland, and Tourism Ireland will be pivotal. These partnerships will enable a unified and co-ordinated approach to marketing Belfast, aligning and integrating campaign plans with key events and initiatives while promoting the city region's joint cultural and tourism experiences.

Supporting Local Communities and Businesses

Visit Belfast's MarComms activities will be designed to maximise economic benefits for local neighbourhoods and areas. Efforts will focus on encouraging visitors to explore lesser-known

aspects, experiences and attractions, thereby distributing tourism benefits and spend more equitably across the city areas.

Competitive Positioning

To enhance Belfast's appeal in the international tourism market, our plans will showcase the city's unique offerings, including an upweighted focus on its rich history, vibrant arts scene, and culinary delights. The promotion of key events and festivals, and the UNESCO City of Music designation, will be leveraged to continue to differentiate Belfast from other destinations.

Agile Marketing Approach

Recognising the need for adaptability in a dynamic tourism environment, Visit Belfast will implement a flexible marketing strategy that can quickly respond to changing market conditions and visitor preferences. This agility will ensure marketing and communications support for BCC and partners, delivered when needed and are relevant and impactful and budget allocations are well placed.

Understanding Consumer Behaviour

Continuous research/insight gathering into shifting visitor/consumer behaviours will inform our marketing strategies. By identifying emerging trends and preferences, gaps in demand, seasonality and day/night-time economy, Visit Belfast can tailor its offerings to meet the evolving needs of the city and its target audiences, ensuring engagement and satisfaction and return on marketing investment.

Comprehensive Communications Strategy

The MarComms plan will incorporate a multi-channel and layered approach, blending traditional advertising and communications and digital media, to cleverly target and reach wide audiences. This includes targeted marketing and PR campaigns that highlight the city's cultural assets and unique visitor experiences, fostering a deeper connection with potential visitors, while reconnecting with past visitors.

Market Context and Key Opportunities

Immersed in Local

Today's visitors crave genuine connections with local cultures. Visit Belfast will create opportunities for visitors to engage with the local neighbourhoods and city region areas through the promotion of cultural tours, curated itineraries, and immersive experiences, allowing them to fully appreciate the city's rich history and vibrant spirit.

Digital Influencer and Personalisation

In a technology-driven landscape, integrating AI into our marketing strategies is crucial. By investing in new technologies and new next generation website, Visit Belfast aims to personalise content, utilise new AI tools and enhance customer engagement, tailoring our offerings to meet the evolving needs and preferences of our visitors.

Luxury Market

With the luxury travel market projected to grow rapidly, Visit Belfast is committed to capturing this segment by offering curated experiences that prioritise high quality personalisation and unforgettable memories. By emphasising experiential travel, we will create unique itineraries that highlight the city's attractions, culinary delights, unique shopping brands, service quality and the destinations unique offerings.

Unique Food and Drink Experiences

Food and drink experiences are a vital ingredient in attracting visitors to Belfast, enhancing our reputation and positioning the city as a premier food destination. Visitors motivated by culinary experiences tend to stay longer and spend more, enriching both our economy and community. Our culinary offerings are an essential part of the Belfast visitor experience and play a significant role in shaping Brand Belfast. The new Food and Drink brand positioning work will provide a new impetus in our marketing and communications activity.

Green Tourism

Sustainability has become essential in the travel sector. Visit Belfast is dedicated to promoting responsible tourism practices that benefit both local businesses and the environment. By showcasing mindful experiences and partnering with sustainability-oriented local members and partners, we aim to offer visitors meaningful interactions while minimising ecological footprints.

Bleisure Travel

In addition, the rise of multi-generational and "bleisure" travel presents an opportunity for Visit Belfast to develop promotions that cater to families and professionals seeking a balance between work and leisure, encouraging extended stays and wider exploration of the city.

Key Achievements and expected outcomes from 2024-25, Year 1 of New Horizons Strategy

- Delivery of 8 leisure campaigns with a key Belfast 2024 promotional focus and funding support.
 - Estimated £102m, delivered to the local economy from Visit Belfast's marketing campaigns with additional funding support for Belfast 2024 which was integrated into VB's destination marketing Summer / Autumn activity.
- Web visitors are expected to reach 2.2 million unique visitors by end of year
- Social media engagements have to date increased by 20% and are expected to reach a record high of 7m.
- Delivered over 300+ unique social videos that captured Belfast and drove over 43 million video views.
- Estimating 200m opportunities to see across press and influencer activity.

Marketing and Communications Plans 2025-26, Year 2

Our comprehensive marketing and communications plans are designed to elevate Belfast's competitive position and enable it to grow and thrive in the dynamic tourism landscape,

fostering connections and delivering exceptional visitor experiences that resonate with today's increasingly eco-conscious consumers.

Visit Belfast's Marketing and Communications plans are principally focused around four key delivery areas, namely marketing campaigns, web and digital, content and publications and communications and PR:

Marketing Campaigns:

- Develop timely campaigns targeting identified and prioritised best prospect market segments, focusing on authentic experiences and local culture.
- Promote city breaks and day trips within the Northern Ireland, Republic of Ireland, and Great Britain and international markets
- Develop thematic marketing initiatives aligned with the key cultural and tourism themes, events, festivals and broader tourism strategies
- Achieve buy-in from members and use of the brand guidelines, that support campaign plans and strengthens the city's overall marketing.

Web & Digital:

- Deliver a new future facing, next generation visitBelfast.com website and significantly increase our digital footprint, consumer engagement, visitor conversion, business promotion and maximises commercial benefits.
- Deliver new visitbelfastpartners.com with the Partnership and Commercial Team to create an asset bank and resource for our membership base and strategic and corporate partners, key agency funders and supporters.
- Optimise Visit Belfast's new websites to enhance user experience and increase and convert online interactions into actual visits.
- Utilise our social media channels to promote local stories, events, and experiences, increasing engagement and reach.
- Creation of authentic and credible videography, photography that aligns with the city's brand values and positioning.

Content & Publications:

- Produce informative and inspiring publications and marketing materials that showcase Belfast's diverse, authentic variety of visitor experiences.
- Develop digital content, supporting key themes that highlight local voices and stories, encouraging visitors to explore beyond traditional tourist paths.
- Support company-wide delivery of publications as required (including Fleadh Cheoil na hEireann)

Communications & PR:

- Implement a revised robust PR strategy that highlights sustainability and neighbourhood engagement, positioning and differentiating Belfast as a welcoming and green destination.
- Provide consumer PR support for BCC's events and festivals as required.
- Engage with local and national media and influencers to amplify messaging and increase visibility.

- Develop more agile and new approaches to the promotion of our successful business events and cruise sectors
- Manage the implementation and assist with the delivery of Visit Belfast's Stakeholder Engagement Strategy

Key Objectives 2025-26

- Promote Belfast city region's event and seasonal calendar to ensure longer stays and shoulder season visits.
- Promote unique and authentic experiences in Belfast's neighbourhoods and city areas to encourage wider exploration.
- Develop inclusive marketing strategies that promote accessibility and sustainability.
- Develop and utilise data-driven insights to inform marketing decisions and enhance marketing & campaign effectiveness.
- Elevate the profile of Belfast as a premier destination for cultural and business events.
- Prioritise and utilise a key thematic approach to our promotion and positioning, history, maritime, food and drink, touch of luxury, gateway city, events and festivals.

Key themes to be used in 2025/26

The key themes for Visit Belfast's marketing and communications activity can be summarised as follows:

- **History & Heritage**

Celebrating Belfast's unique character and rich past through its iconic landmarks, cultural traditions, and compelling stories. Showcasing the city's renowned maritime legacy, heritage attractions, political murals, and the contributions of the people who shaped its history offering an authentic and vibrant experience rooted in its distinctive identity.

- **Arts & Culture**

As a designated UNESCO City of Music, Belfast is recognised globally for its rich musical heritage, offering impressive musical experience to visitors. This combined with its vibrant hub of arts and culture, contemporary art galleries, theatres and festivals positions Belfast as a must-visit destination for cultural exploration and inspiration.

- **Food & Drink**

Uniquely Local - Showcasing Belfast's rich culinary offerings, including local restaurants, food markets, distilleries, and tasting experiences. Promoting the city's diverse food scene, unique flavours, and traditional cuisines.

- **Events & Festivals**

Promoting the city and region's annual events calendar, including both seasonal and local activities. Highlighting major festivals, sporting events, cultural gatherings, and community celebrations that take place throughout the year.

- **Neighbourhoods & Local Connections**

Homespun Pioneers - Curated stories, history, and heritage: Focusing on the unique character

and stories of Belfast's neighbourhoods. Highlighting the rich culture and history, heritage attractions, local traditions, and the contributions of famous people and the people who call these neighbourhoods their home.

- **Multi-Destination Activity Trips**

Promoting Belfast as a gateway to the natural beauty of the surrounding seascapes, hills, and landscapes. Highlighting outdoor activities, hiking trails, scenic drives, and opportunities for nature exploration in the city region. Showcasing Belfast as a hub for both Slow Tourism and Extreme Day Trippers, offering immersive, unhurried experiences alongside high-energy adventures. Inclusion of planned itineraries and thematic activities with multiple locations, from Parkrun tourism to multi-stop outdoor excursions, creating a richer and more varied travel experience.

- **Family Adventure**

Belfast is packed with family-friendly activities, offering a mix of history, outdoor adventures, hands-on experiences, and fun for all ages. From exploring the city's cultural heritage to enjoying green spaces and seasonal events, Belfast provides endless opportunities for memorable family days out.

- **Sustainable Itinerates**

Embodying our dedication to climate change and sustainable practices through focusing on eco-friendly practices and authentic experiences. By encouraging visitors to explore lesser-known areas, use sustainable transport, support local businesses, and engage in low-impact activities, these itineraries help reduce environmental footprints while enhancing the overall visitor experience.

- **Luxury Travel**

Carefully curated experiences, partnerships and marketing initiatives positioned to align with the preferences of the aspirational luxury traveller and target those seeking unique, bespoke and luxe travel experiences.

- **Accessible and Inclusive**

Reflecting the diversity of a welcoming, safe, fair, and inclusive city for all visitors. Emphasising Belfast's accessibility features, inclusive attractions, and efforts to create an inclusive and welcoming environment (LGBTQ+, Disabled persons, minority groups.)

By incorporating these key themes as appropriate into our marketing and communications activities, Visit Belfast can effectively promote the city's unique offerings, attract a diverse range of visitors, provide reasons to stay longer and enhance the overall visitor experience.

Key interventions for 2025/2026

Activity: Marketing Campaigns

Approach: Our marketing campaigns are strategically designed to promote the city region as a forward-thinking place to live, work, visit and invest, aligning with BCC's strategic pillars: Grow, Position, Experience and Sustain, as outlined in the draft tourism strategy.

Using an integrated marketing approach, we will focus on destination-led, seasonal campaign activities. By leveraging consistent messaging and insights-driven media, we will inspire city breaks and day trips from our prioritised target audiences and markets.

We are committed to supporting our industry partners BCC, TNI and TI and will continue to work closely with them to enhance tourism, arts, cultural and heritage experiences. These efforts will help to elevate these initiatives, driving greater awareness and engagement among our key audiences and markets with plans that are designed to remain flexible, enabling us to execute swift, strategic and tactical activities as needed.

By leveraging our key themes and staying tuned to emerging consumer trends, we will continue to enhance Belfast's appeal as a destination of choice. This approach ensures we remain relevant, responsive and competitive, strengthening Belfast's position as a leading tourism destination.

Summary – areas of focus

Destination marketing campaigns:

Themed around the seasonal calendar, our approach will incorporate integrated, targeted campaigns inspired by strategic insight driven media plans, strong place-based content, key themes and consistent messaging to invite and inspire our audiences and markets. Our campaigns will endeavour to be inclusive of diversity, accessibility and sustainability, while working collaboratively with partners and stakeholders to promote the city region.

Key campaign themes:

- **Hidden Gems:** Spotlighting local hidden gems and unique experiences within our neighbourhood and city region areas, creating deeper connections and elevating local connections within the city brand.
- **Arts & Cultures:** Elevating awareness of cultural festivals and events that take place within the city as appropriate.
- **Food & Drink:** Showcasing Belfast's rich culinary offerings and promoting the city's diverse food scene, unique flavours, and traditional cuisines

Key Markets:

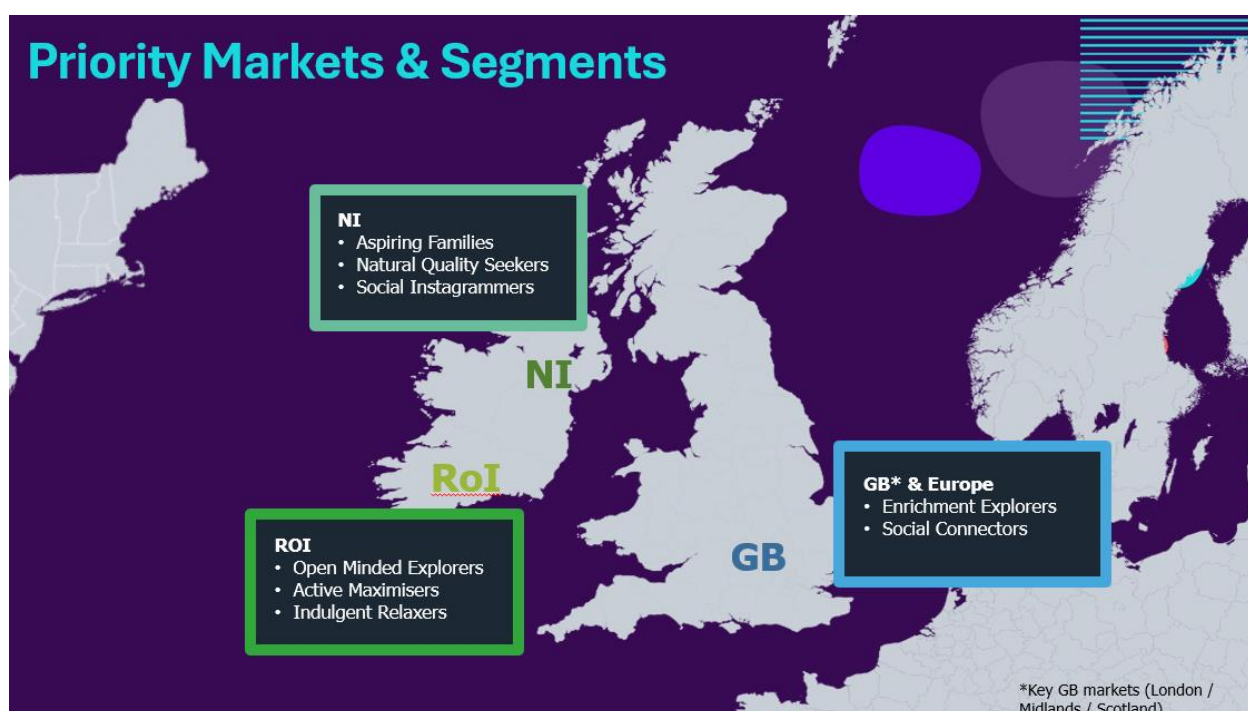
Attract city breaks, day trips and short stays from local, national and international markets; GB, ROI, NI and direct access European markets.

Collaboration:

Working closely with our industry partners and BCC, TNI and TI.

Priority Markets & Segments:

Visit Belfast continues to focus on best prospect direct access markets, prioritising identified segments and source markets with the strongest potential to convert to visits and revenue growth. Priority tourism markets are GB, ROI, Domestic and European. Our marketing activity focuses on key market segments identified through the TNI and TI's segmentation strategy. These are illustrated in the graphic below.



Campaigns Calendar* 2025 / 2026:

Visit Belfast's marketing will focus on prioritised opportunities to position and grow Belfast's tourism including key events and festivals within the city, strengthening and deepening visitors' connections with our neighbourhoods and wider city region and using seasonal and regional experiences that differentiate the city offer from competing destinations. Incorporating various strands of our marketing and campaign themes, the table below sets out an early illustration of our topline draft campaign calendar for the year.

	2025								2026			
	April	May	June	July	August	September	October	November	December	January	February	March
Key Festivals / Events						Maritime Festival 6th & 7th September						
Campaigns			Maritime Teaser	Maritime Campaign								
	Spring / Summer Campaign					Autumn / Winter Campaign	Christmas Campaign				Spring Campaign	

**This draft calendar is for illustration purposes and may be subject to change.*

Activity: Web and Digital

Approach: Visit Belfast adopts a forward-thinking, data-driven approach to digital marketing and communications to effectively engage key audiences and position Belfast as a leading travel destination. Visit Belfast will accelerate its digital capabilities to remain at the forefront of digital trends, with a continued focus on:

- Developing and transforming **visitbelfast.com** into an accessible, user-centric, and interactive platform with enhanced SEO and personalisation.
- Prioritising **short-form video content** such as Instagram Reels, TikTok's and user-generated content to drive engagement and authenticity.
- Implementing a robust **social media strategy**, balancing organic and paid campaigns to maximise visibility on platforms like Instagram and Facebook.
- Leveraging long-term creator partnerships to build lasting audience connections.
- Developing impactful **email marketing campaigns** with personalisation, automation, and seasonal alignment.
- Utilising **AI tools** for content optimisation, personalised user experiences, and enhanced search capabilities.
- Embracing a **test-and-learn culture** to experiment with digital channels, messaging, and content formats, ensuring continuous improvement.

Summary – areas of focus

Visit Belfast Digital Strategy 2025-26

The Visit Belfast Digital Strategy will focus on leveraging emerging trends, data-driven insights, and innovative technologies to enhance engagement, drive traffic, and position Belfast as a leading travel destination. This forward-thinking approach emphasises user-centric experiences, authentic storytelling, and seamless integration of digital platforms to deliver impactful, engaging content.

Key Pillars of the Strategy

Social Synergy & Authentic Narratives

- Maximise engagement through user-generated content (UGC) powered by CrowdRiff and dynamic short-form videos like Instagram Reels and TikToks.
- Balance organic and paid media to optimise reach and year-round engagement on key platforms such as Instagram and Facebook.
- Collaborate with influencers and creators for authentic, long-term partnerships that foster deeper audience connections.

Virtual Gateway

- Transform visitbelfast.com into an accessible, interactive, and user-centric platform with personalised recommendations, SEO optimisation, and tools like itinerary planning.
- Conduct monthly SEO audits to ensure high-performing keywords and consistent traffic growth.
- Prioritise integration with social platforms to create a cohesive digital ecosystem.

Strategic Inbox

- Develop personalised, mobile-friendly email campaigns using automation and segmentation to deliver timely and relevant content.
- Align campaigns with seasonal trends, special events, and audience preferences to drive conversions.

Intelligent Insights

- Leverage AI tools to optimise content delivery, refine search experiences, and improve personalisation strategies.
- Share AI-driven insights across teams to align strategies and foster a cohesive digital approach.

Test and Learn

- Adopt a culture of continuous experimentation across all digital channels, testing formats, messaging, and strategies to adapt to evolving trends.
- Utilise real-time data analytics to optimise performance and audience engagement.

Strategic Focus Areas

- SEO and Discoverability: Increase high-performing keywords, enhance social search opportunities, and align website and social content.
 - Content Innovation: Invest in dynamic, engaging formats like short-form videos and employee-generated content (EGC) to humanise the brand.
 - Audience Engagement: Prioritise authentic storytelling and transparency to build trust, loyalty, and meaningful connections with target audiences.
 - Digital Commercial Opportunities: Enhance partner visibility through sponsored placements, advertorials, and dynamic profiles while maintaining a seamless user experience.
-

Activity: Content and Publications

Approach: Visit Belfast is committed to the development of engaging and reliable content tailored to resonate with our diverse visitor audiences. As an extension of our digital content our portfolio of literature serves as both sales and marketing tools for the city, as well as supporting our visitor servicing requirements.

Summary – areas of focus

Digital Content Planning

A continuous and dynamic activity and key contributor to our marketing success. We will create a range of inspiring content that highlights the unique themes and experiences Belfast has to offer. This curated content will be thoughtfully adapted for use across all platforms, including our website, social media channels, and newsletters, as well as traditional PR and campaign efforts.

By focusing on effective communication and engagement strategies, we aim to foster a deeper connection with our audience, ensuring that Belfast remains a top-of-mind destination that continually inspires exploration and appreciation of our vibrant city and its rich cultural offerings.

The Belfast City and Region Guide

Produced three times a year and includes inspirational editorial features and a directory of partner listings for key activities, attractions, tours and food and drink experiences. It is distributed widely throughout the city via guest accommodation, key transport hubs in Northern Ireland and Dublin, Stena Line onboard guest services and the Visitor Information Centre network across Northern Ireland.

The Belfast Student Guide

Produced and distributed annually during September's Freshers' Week via welcome events, faculty departments and student accommodation.

Other miscellaneous and campaign specific brochures will be produced as and when appropriate whilst taking available budgets into consideration, For example, updates to **Visitor Maps, Restaurant Voucher Scheme, Marketing Opportunities and industry support materials**. All literature will be made available in digital formats and introducing sustainable options for print (FSC approved paper and carbon balanced.)

Activity: PR and Communications

Approach: Visit Belfast is committed to enhancing its reputation and increasing awareness of its sales and marketing plans, visitor servicing, and commercial activities among key consumer and corporate audiences. Our Public Relations (PR) and Strategic Corporate Communications team will drive positive reinforcement through local, national, and international media relations.

Through effective stakeholder management strategies and well-executed media relations, Visit Belfast will utilise the power of PR and Communications to elevate city and organisation's reputation, and strengthen competitive positioning and influence.

Visit Belfast will actively seek collaborative and mutually beneficial PR opportunities with partners that support our goals and those of the wider tourism sector.

Summary – areas of focus

- **Position** Belfast in the minds of our visitors as an easy to access place of interest. A place where there's a story to be explored through its history, experiences and people. Belfast is a must-see city ideal for a break or day trip.
- **Utilise** our key themes through a calendar of integrated PR activity for the whole Visit Belfast organisation and our partners. Utilise our USPs and key themes for the year – our people, neighbourhoods, communities, advancement in sustainable tourism, success stories and local tourism trends.
- **Generate** coverage through a multichannel approach. Through media, influencers and online channels, generate stories, emotion and tell compelling stories through narratives, storytelling, imagery and video.
- **Collaborate** through collaboration with our partners, funders and stakeholders (Tourism NI, Tourism Ireland, Belfast City Council and strategic and corporate partners) and maximise exposure and positive share of voice for the city region.

Influencer engagement

Influencers provide a level of authenticity above traditional advertising with 70% of consumers trusting user generated content more than traditional marketing methods. Authenticity and impact are heightened further in travel and tourism, with 75% of travellers being influenced by social media when choosing travel destinations and 60% of travellers using other guest experiences before choosing their hotel.

The growing reliance on social channels as search engines further underscores the importance of influencer content. Notably, 64% of Gen Z audiences now use TikTok as a search engine to discover new content, relying on shared recommendations and intentional searches. To maintain a credible and competitive presence on these platforms, it is essential to prioritise influencer content and engagement, ensuring it aligns with our mission to inspire visitors and elevate awareness of the city region.

Our approach will focus on two key elements:**1. Seasonal campaign influencer activity**

Aligning with Visit Belfast's seasonal marketing campaigns, pinpoint complimenting content creators to further promote the campaign messaging and key themes.

2. Always on, content partnership

With a predicted shift to long-term creator partnerships and 2025 seeing brands opting for ongoing collaborations, Visit Belfast will contract a yearlong content ambassador.

Influencer activity objectives:

- Enhance brand discovery among key audience segments
- Increase awareness and engagement for seasonal campaigns
- Foster long-term creator partnerships for sustained growth

PR metrics and reporting

Traditional PR metrics, such as Advertising Value Equivalent (AVE), are increasingly outdated and no longer recognised by the CIPR as valid measures of PR activity. As the media landscape continues to evolve with a shift towards online publishing and social media, it is essential that Visit Belfast adopts modern measurement tools and approaches to evaluate and demonstrate the value of our public relations activity.

Effective PR measurement requires focusing on metrics that combine both qualitative and quantitative approaches. It's about leveraging advanced tools, methodologies, and frameworks that delve deeper than surface-level data to deliver meaningful insights.

In line with the globally recognised Barcelona Principles for PR measurement, Visit Belfast will look to make a shift towards the following measurement and reporting metrics across all activity:

- Reach and Impressions
 - Opportunities to See
 - Engagement
 - Share of Voice (SOV)
 - Sentiment Analysis
 - Message Penetration
-

Marcomms KPIs for 2025-26

Area	KPIs
Overnight visits	250,000
Day trips	250,000
Bed nights	350,000
Marketing Campaigns	100m impacts over 6 campaigns
Publications	6 publications with 1.5m readership
Leisure spend	£62m
Web visits	2.6m
New email subscribers	18,000
Social media followers	495,000
Social media impressions	49m
Engagements	3.8m
Video views	26.9m
OTS (Opportunities to see)	150m

7.2 Visitor Servicing and Destination Management

Introduction and context

Visitor Servicing is central to successful destination stewardship, supporting Belfast City Council's 10-year tourism strategy 'Make yourself at home' and delivering regional visitor spend. Visit Belfast's Visitor Servicing and Destination Management activity has been based around a hub-and-spoke model with the Visit Belfast Welcome Centre (VBWC) representing the information and resource hub. The supporting spokes include key visitor touch points e.g. Belfast International Airport, Grand Central Station and the Cruise Welcome Hub. Our main aim is to enhance the visitor experience by inspiring visitors to see more, do more and spend more while in the city, its neighbourhoods and the wider NI Region.

In year 2 of the New Horizons strategy, we will continue to promote the themes of Sustainability, Accessibility, Regionality, Neighbourhood Tourism and promoting local experiences for residents and visitors. At the same time, we will continue to focus on promoting our 'Hero' anchor attractions e.g. Titanic Belfast, Crumlin Road Gaol, City Hall, Ulster Museum, Belfast Zoo and Belfast Castle as key places to visit when in the city.

Our front-line staff will tailor guidance based on the needs of visitor, focussing on an extended portfolio of key attractions and hidden gems in Belfast, the wider city region and provide information on connectivity and sustainable travel options.

Neighbourhood Tourism remains an important element of the three-year strategy. While overall responsibility rests with the Director of Visitor Experience and Destinations Initiatives, delivery of the Neighbourhood Tourism action plan continues to be supported across the organisation by all departments.

Work will continue within the Industry Engagement Programme "Get the Knowledge" to train and offer first hand experiences to front-line staff from across the industry who regularly engage with visitors, to enhance their confidence and knowledge of visitor attractions, events & festivals in Belfast and beyond. To spread the economic and social benefits of tourism, it is essential they have strong destination product knowledge and are comfortable encouraging visitors to explore more.

In 2025-26 we will extend our outreach visitor servicing activity, with Travel Advisors and volunteers on the ground at key festival and business events. This approach will permit greater engagement with visitors at off-site locations. Enhanced visitor servicing will be available at the following events:

- The 153rd Open at Royal Portrush (17-20 July)
- The All Ireland Fleadh Cheoil na hEireann (Wexford 3 – 10 August)
- Belfast Maritime Festival September (dates TBC)
- The Oireachtas na Samhna (29 Oct – 2 Nov)

Underpinning all activity is the need to maintain and grow our commercial focus to support operational costs. This is especially important for retail and ticketing and the commercial sales of platforms across our VICS.

Key achievements 2024-2025

- 701,800 enquiries handled generating £17m into the local economy.
- Opened a shared desk facility with Translink covering tourist information & transport enquiries at Grand Central Station in September 2024.
- Overall commercial income generated to support VS is projected to be £794k
- 8% growth in retail income target due to commercial focus at VBWC and Cruise.
- Provide Box Offices services for 60 businesses.
- Installed a suite of localised visitor information welcome walls in North Belfast York Street and South Belfast Botanic Railway Station.
- Installed full length internal panels promoting city centre, Maritime Mile and neighbourhood visitor attractions on the fleet of the new low emission buses operating the route from George Best Belfast City Airport – City Centre.
- Provided Neighbourhood Tourism training to 26 front line industry staff including Translink and all Visit Belfast front of house staff.
- Collaborated with BCC and TNI to deliver the first Embrace an Inclusive Spirit Conference in Feb 2025.
- Most successful Industry Engagement Programme to date with tourism industry representatives attending 3 neighbourhood-focused FAMs (to date) and average attendance of 46 at quarterly briefings.
- Winner of Best VIC for the 20th Year for the NI Travel and Leisure Awards.

Visitor Servicing Objectives 2025-26

- Service 805,000 visitor enquiries, delivering an economic benefit of £19 million.
- Handle 252,000 gateway enquiries, ensuring the economic benefits of tourism are extended into the City Plus area and the rest of Northern Ireland.
- Strengthen commercial focus. The Visitor Servicing team will generate net commercial revenue of £878,437 (64% of all visitor servicing costs).
- Maintain visitor satisfaction levels of our services to 85% very satisfied, 15% satisfied.
- Provide a warm and reassuring welcome to up to 320,328 cruise passengers across 144 ships.
- Cruise ships delivering £23 million into the local economy.
- Capture data across key visitor touch points and through Visitor Satisfaction surveys and new VIC tracking system to establish and inform important trend data and insights.
- Champion Neighbourhood Tourism across the organisation, ensuring it is a focus in key areas of delivery across: Visitor Servicing, Marketing and Communications, Partnership, Travel Trade, and Business Development referrals.
- Establish a baseline for referrals by VIC team to the city's neighbourhoods, and a baseline of footfall to Neighbourhood attractions.
- Develop sustainable messaging for VIC teams e.g. Explore the City by foot, bike, boat, public transport to promote local products and Neighbourhood experiences.
- Extend and enhance Visit Belfast's Industry Engagement programme, updating and briefing front line tourism and hospitality staff on city and wider region, so they gain the knowledge to "upsell" the destination to their customers.
- Continue collaboration with Belfast City Council to deliver on destination initiatives: including accessibility, city connectivity, ticketing, event support Neighbourhood/ Community Tourism.
- Support Belfast City Council and Belfast's bid to host the Fleadh.
- Co-ordinate the inter-agency forum working towards a Code of Conduct for the city's Hop on Hop Off Bus Tours and Sightseeing Services.
- Work with agencies and or private sector to provide secure overnight coach parking and additional city centre drop off / pick up location for visiting coach operators.
- Data and insights - New streamlined methods in place to capture/ record data for profiling customers, Neighbourhood referrals, Gateway enquiries and Visitor Satisfaction.
- Accessibility – Continue to work with BCC, TNI, NITA and Open Arts in delivering the Belfast Access and Inclusion Implementation Plan 2023- 2026.

Key Areas of Visitor Servicing Activity

Key areas of visitor servicing activity are set out below, together with their respective KPIs:

Activity: Grow and harness the power of visitor servicing, to increase length of stay, visitor spread, and spend across all Visit Belfast's VIC's and visitor touch points, including Translink's new Belfast Grand Central station

Aim: Grow Visitor enquiry levels to deliver more visitor spread and spend across the city, its neighbourhoods, Regional Partnership areas and the rest of Northern Ireland.

Context: Growth in demand over the next three years is expected to come from:

- Cruise – Over 1 million cruise visitors projected over the next three years, with 320,328 pax and crew projected for 2025.
- Leisure visitors coming for short breaks, day trips, events, festivals, and cultural activities
- Conferences and business events (98 conferences, 37,000 delegates in 2025)
- Major events including the 153rd Open at Royal Portrush, Oireachtas na Samhna & All Ireland Fleadh Cheoil na hEireann 2026 and 2027 (TBC)
- Demand/Growth will be supported by increased air and sea access, improved transport links (hourly train service from Dublin) and increased bus connections between Dublin and Belfast.
- Increased marketing by TI, TNI and VB, and partners in key markets
- Ferry Connections remain buoyant between N Ireland, Scotland and England with P&O, Stena Line
- Increased marketing by TI, TNI and VB, and partners in key markets

Key productivity measures 2025-2026

- 805,000 enquiries (5% Increase on 2024-25 target)
 - 546,000 visitors through the door at VBWC, BIA Airport Desk and Grand Central Station Desk (+10% increase on 2024/ 25)
 - 186,000 enquiries at Cruise Hub and off site at business/ Leisure events (+7.5%)
 - 252,000 gateway enquiries
 - Total enquiries generate an economic impact of 19 million (+5.5%)
-

Activity: Positioning Belfast as the Gateway to Northern Ireland and promoting regional spread

Aim: To service visitors and provide Belfast and NI wide visitor information.

Context: Just under one third (32%) of all enquiries handled by Visit Belfast relate to the rest of Northern Ireland, demonstrating the importance of visitor servicing in spreading the benefits of tourism across the region.

Key productivity measures 2025-26:

- 252,000 gateway enquiries across all visitor servicing touch points driving regionality throughout Northern Ireland.
 - Generate an additional £6 million into the local economy.
 - ROI for TNI £1: £50 into the local economy.
-

Activity: Grow Visit Belfast's commercial income

Aim: To support Visit Belfast's operational costs by adopting a strong commercial approach to our operations, with a particular focus on retail sales across VBWC and Cruise.

Context: Resources and commercially focused staff are in place to drive this growth. Income targets for Retail and Ticketing are based on a volume-based model on either visitor footfall (VBWC), cruise visitors (Cruise Hub) or Airport Passengers (BIA), set against a conversion factor for financial transactions, and average transaction value based on the previous year's outputs.

Commercial Income – Projected performance figures and context:

- Commercial income from visitor servicing targeted at £878,437 (+9%) which equates to 64% of running costs.
-

Key Retail productivity measures 2025-26:

- Target sales across VBWC and Cruise Hub, (+18%).
 - Recruit seasonal retail focused sales team.
 - Careful selection of product lines for each retail outlet, VBWC and Cruise Hub.
 - Managing Stock, effective merchandising and presentation.
 - Achieve good discounts from supplier's and target GPM of 54%.
 - Increase locally sourced products from 50 to 55 suppliers.
 - Deliver three local suppliers market day events at Cruise Hub.
 - Further develop the corporate gift guide and corporate gift sales.
-

Activity: Develop Visit Belfast's box office services

Aim: To support operational costs by further developing Visit Belfast's box office services.

Context: Visit Belfast box office plays a critical role in supporting and promoting the city's rich cultural, heritage festival & event programme, including our burgeoning food / drink and music scenes, and cultural offerings. VICs have a key role in promoting the array of activity across the city to visitors and residents. Similarly, they enable a variety of user-friendly booking methods and payments for customers.

Key productivity measures 2025-26:

- Increase ticketing income to £98,448 net sales. (+10.5%)
 - Expand the provision of Box Office services from 54 clients to 64
 - Grow commission levels, where feasible.
 - Provide a key Box office role for Belfast International Arts Festival, Northern Ireland Science Festival.
 - As part of our B2B development and supporting role we will aim to further extend our services to smaller community-based initiatives.
 - Building on year 1 Neighbourhood Tourism Focus (10 new Neighbourhood experience providers) support an additional 10% new neighbourhood product providers across the city.
 - As agreed with NI Science festival as part of their CSR scheme sales will go towards Visit Belfast's chosen charity The Peoples Kitchen (0.5% of our commission).
-

Activity: Enhance the current joint Visitor Pass with Translink

Aim: Improve and Enhance the Current Joint Belfast Visitor Pass with Translink

Context: A key focus of 2025-26 will be to work with Belfast City Council and other stakeholders to enhance the connectivity between our 'hero' anchor attractions and smaller, lesser-known tourism experiences. This will extend the visitor experience beyond the city centre and into the local neighbourhoods and wider city region thereby extending the visitor spend across the city.

Belfast Visitor Pass

In the current financial climate, a digital version of the Belfast Visitor Pass (BVP) is no longer an option. Efforts will now focus on enhancing the current pass, in collaboration with our partner Translink. The BVP, a transport pass with discounts, remains popular with visitors, however there is no mechanism to track visitor journeys or what attractions they visit.

We will work with Translink to better understand their ticket tracking facilities and advocate for a solution that will provide the valuable data and insights needed e.g. a breakdown of BVP journeys across the City and Belfast neighbourhoods. This intelligence would be beneficial in securing new business from neighbourhood providers e.g. to confidently say "x" journeys using the Belfast Visitor Pass were made to North/ South / East/ West Belfast. Robust data

such as this would provide a useful source of credible data and information to attract new offers for the Visitor Pass, which ultimately will create a better visitor experience.

- Engage with Translink to scope greater profiling of neighbourhood areas.
 - Work with Translink to investigate ticketing technological solutions and options to track visitor pass journeys.
 - Conduct a scoping exercise with Translink to assess the feasibility of extending the reach of the pass into RTP areas that are accessible by public Transport.
 - Joint promotion and PR with Translink.
-

Key Destination Management Initiatives

Activity: Industry Engagement Programme “Get the Knowledge”

Aim: To build destination product knowledge amongst front of house tourism & hospitality staff who are in daily contact with visitors.

Context: This programme will have an added focus on neighbourhood tourism. This capacity building programme aspires to ensure the economic and social benefits of tourism are spread across the city into our neighbourhoods and wider Belfast City Region, through knowledgeable, confident and informed front of house staff.

Key outputs:

- 4x seasonal Industry briefing updates for information sharing. Invited industry representatives speak directly to front of house staff about their product. Regular contributions from strategic, neighbourhood and Belfast Plus partners (Translink, Lisburn and Castlereagh City Council and Ards & North Down Borough Council).
 - 2-3 familiarisation Trips aimed at front of house staff and VIC network to increase product knowledge and confidence in promoting the destination. Messaging to include front of house staff role in shaping the visitor experience.
 - 2 Regional Tourism Partnership Fam Trips to include VIC Network.
 - 4x neighbourhood guided walking tours with focus on community products and stories.
 - Weekly What’s On ezine to industry front of house database.
 - Scoping exercise with local tourism partnerships to identify area ambassadors across Belfast and assess the possibility of implementing a neighbourhood greeter scheme by year 3.
-

Activity: Volunteer Programme

Aim: To enhance the welcome for visitors and provide support to our front of house staff via a signposting service.

Context: Volunteers can provide a very useful extension of our visitor information servicing activity, helping Visit Belfast enhance and extend our services and providing the welcome at all our visitor touchpoints.

Key outputs:

- Consolidate volunteer pool always having a minimum of 15 active volunteers in peak season.
- Primary role is to welcome, signpost and orientate visitors across locations e.g. the cruise hub, Belfast Welcome Centre and conference venues and “off-site” events
- Volunteers to have a role in promoting Neighbourhood tourism by sharing knowledge and passion for their part of the city.
- Increased capacity to enable facilitation of a wider range of visitor servicing support e.g. wrap around services at key city events.
- Contribute to our CSR (volunteering provides residents, from all backgrounds, with the opportunity to give something back to their city. This brings with it a sense of purpose, increased civic pride, brings communities together, which in turn brings about improved mental and physical health).
- End of season review and recognition event.

Activity: Sustainable Destination Messaging

Aim: Engage with visitors to promote the city’s sustainable credentials, and recommend sustainable transport options, local products, neighbourhoods etc.

Context: Visitors are more likely to make sustainable choices in destination if it is easy for them to do so and it is important that conscious travellers are aware of and able to access sustainable options.

Key outputs:

- Staff and volunteers to receive internal training and briefings on how to communicate to visitors about the efforts being made towards Belfast’s Sustainable City Journey and the practical steps they can take to make more sustainable choices.
- Continue to monitor visitors interest and support of Sustainable tourism and experiences through our Visitor Satisfaction surveys.
- Adapt TNI’s new Visitor Print reuse scheme, informing visitors and encouraging uptake.

Activity: Visitor Insights and data

Aim: To strengthen research, intelligence, and insights to aid Visit Belfast with decision making and to share information with stakeholders and partners.

Context: Visit Belfast can provide via its VIC base and outreach activities a rich source of visitor data and insights through both the quarterly Visitor Satisfaction surveys and the completion of customer profile information through our staff referral tracking process. Key findings can be included in the Tourism Barometer and shared with stakeholders and partners.

Key outputs:

- Target 2,000 surveys across key visitor touch points
- Additional tracking of visitor spend at cruise through visitor satisfaction surveys
- Put in place VIC pilot tracking referral process to enhance visitor profile insights
- Capture sales and booking information
- Capture neighbourhood referrals / baseline footfall to Neighbourhood experiences.
- Capture visitor satisfaction levels through surveys
- Baseline figure for footfall to neighbourhood tourism experiences

Activity: Accessibility and inclusion

Aim: Improve visitor information provision and servicing for all.

Context: Visit Belfast will continue to support the delivery of Belfast City Council's three-year Belfast Access and Inclusion Implementation Plan (2023 – 2026) to help ensure our city welcomes all visitors on an equal basis. Visit Belfast will communicate training opportunities to its partners and encourage engagement in the programme, and further development of tools to assist all visitors with accessible needs.

Key outputs:

- Further development of the new Digital Accessible Guide for Belfast housed on VisitBelfast.com.
- New AccessAble portal in place, work with BCC and AccessAble to encourage an increase in the numbers of Belfast partners having good accessible guides on the platform
- All Visit Belfast Front of House teams to undertake Inclusivity training including the Jam Card and Deaf awareness course.
- All Visitor servicing staff and volunteers to keep abreast of key developments, assets and tool kits delivered by City partners, particularly BCC and TNI.
- Collaborate with BCC/ TNI and partners to strive for best practice across the city in terms of access and inclusivity.
- VBWC Accessibility review complete. Key action to replace Lift or install a ramp.
- Visit Belfast's new Simpleview web platform will provide additional accessible tools leading to a more inclusive visitor experience.

KPIs	
Total visitor enquiries handled	805,000
Visitor footfall at VBWC, BIA, Grand Central Station	546,000
Maintain visitors' satisfaction levels	85% very satisfied and 15% satisfied
Gateway enquiries as a proportion of all enquiries	252,000
Income generated through commercial activity	£878,437
Visitor servicing economic benefit	£19m
Productivity Measures	
Increase ticketing clients	from 54-64
Increase locally sourced merchandise	from 50-55
Maintain volunteer numbers	Maintain a minimum core of 15 volunteers Aim to grow to 20-25 in year 3 to assist with Fleadh
Good participation in the VB's Industry engagement programme	Participation Targeted at: <ul style="list-style-type: none"> • 170 attendees at Quarterly Briefings. • 48 attendees on Neighbourhood walks. • 130 attendees across Neighbourhood and RTP fam trips.
Explore further use of new technology, such as AI to enhance visitor servicing	<ul style="list-style-type: none"> • Relevant visitor servicing staff (7) to undertake TNI Training on Introduction to AI for Tourism. • Three staff participate in Webinar for AI for Data Analysis. • Participation in CityDNA AI for destinations programme.
Promoting Belfast's sustainable story via our VIC teams	<ul style="list-style-type: none"> • All front of house visitor services teams (12) seasonal staff and volunteers to receive sustainability training and refresher sessions.
Enhancing provision of information on accessibility	<ul style="list-style-type: none"> • 10 visitor servicing staff to participate in Open Arts Accessibility awareness workshops.
Number of neighbourhood tourism referrals	<ul style="list-style-type: none"> • Baseline for year 1 was 15,455 specific referrals into North/ South/ East and West. • 17,000 target for 25-26. • More granular system being piloted in Feb/ March 2025 for roll out in April- which will also capture referrals to NT experiences / Product providers.

Neighbourhood Tourism

Neighbourhood tourism focuses on creating visitor experiences that connect people with the authentic character of city districts. It provides opportunities for visitors and residents alike to engage with local culture in a way that goes beyond traditional tourist attractions. These neighbourhoods, which are not necessarily on the outskirts of cities, showcase diversity and distinctiveness, adding depth to a city's overall tourism appeal.

By encouraging exploration beyond the main visitor hubs, neighbourhood tourism supports longer stays and helps distribute the economic benefits of tourism more evenly across the city. Just as importantly, it has a social impact, celebrating the unique identity of different areas, fostering civic pride, and encouraging local people to see their own city through fresh eyes.

The Belfast Context

Our strategy highlights an emerging trend that travellers today are increasingly looking for meaningful experiences that allow them to connect with local communities and uncover the authentic spirit of a place. Across Europe, cities are integrating neighbourhood tourism into their strategies to enhance visitor engagement and extend stays.

For Belfast, this presents a major opportunity. Strengthening the appeal of its neighbourhoods as part of the wider tourism offer is a key priority for Visit Belfast. By promoting neighbourhood experiences, visitors are encouraged to explore beyond the city centre, engage with local culture, and discover what makes Belfast unique.

Visit Belfast, in partnership with Belfast City Council, Fáilte Feirste Thiar, Eastside Partnership, and potential tourism clusters in South and North Belfast, as well as other key stakeholders, is committed to developing neighbourhood tourism in a responsible and sustainable way.

Neighbourhood tourism is a core focus across Visit Belfast, in the first year of the strategy significant progress has been made with positive outputs achieved. Reporting to Visit Belfast's Operations Committee, as well as BCC's Neighbourhood City Connections partners, this initiative will continue to evolve in Year 2. The focus will be to further embed neighbourhood experiences into mainstream activities, enhance promotion across all departments, build awareness across our own and industry teams on not just the key visitor attractions, but the hidden gems and authentic experiences found within our neighbourhoods.

Key achievements 2024- 2025

- Installation of prominent neighbourhood wall graphics and dedicated literature area in VBWC, and the Cruise Hub.
- Updated Neighbourhood content on digital screens across 20 locations.
- Neighbourhood tourism training for VIC, cruise, volunteer and external Front of House staff including familiarisations.
- Pilot of a new referral tracking system to establish neighbourhood baseline (City Centre, North, South, East and West) with a baseline of 15,455 enquiries.

- More granular referral process on Neighbourhood referrals – to individual experiences across North, South, East, West will be introduced in April. Target 17,000 referrals.
- Dedicated member of VIC team appointed to a new Neighbourhood Liaison role.
- Regular engagement with neighbourhood tourism partnerships.
- Neighbourhood messaging the focus of Welcome Walls at York Street and Botanic Railway stations plus buses operating the route between George Best Belfast City Airport and City Centre.
- Dedicated neighbourhood profiles across suite of visitor publications, ezines, blogs and press releases.
- Seasonal campaign activity included neighbourhood products.
- Influencer visits to neighbourhoods generated social content.
- Neighbourhood video content filmed for dedicated digital marketing and social media campaigns.
- Neighbourhoods included in extensive round of travel trade and cruise marketing sales calls.
- Neighbourhood Travel Trade Webinars to be delivered by year end.
- Neighbourhood products showcased during USA Cruise Sales mission in October.
- Inclusion of neighbourhood tourism experiences in delegate promotional offers (conference and cruise crew).
- Business tourism referrals to unique neighbourhood venues.
- 4 industry Marketing Opportunities workshops delivered in neighbourhood areas.
- Neighbourhood Tourism presentations as part of the launch events across the city of Belfast City Council's Neighbourhood investment fund.

Strategic focus – Year 2 Organisation Wide Neighbourhood Tourism Outputs

<p>Visitor Servicing: Disperse visitors across the city and Into Neighbourhoods</p>	<ul style="list-style-type: none"> • Build on enhanced neighbourhood profiling in VBWC, BIA and Cruise Hub and continue with product knowledge training for Visit Belfast teams and front of house industry staff. • Strengthen links and collaborative working with Eastside, Failte Feirste Thiar, emerging clusters in South and North and product providers. • With Visit Belfast web and Digital teams further develop neighbourhood curated itineraries using new Digital Mapping tools “You Smart thing” to disperse visitors into neighbourhoods and wider city region. • Develop a mini “Great Days Out” programme and market unique neighbourhood ideas for day trips to the coach market/ local groups. Through targeted segmental marketing we can raise the profile of neighbourhood products as attractive places to visit. • Collaborate with Translink to strengthen the neighbourhood proposition in the Belfast Visitor Pass and their Glider and Metro publications (digital and print). • Work with key neighbourhood attractions / experiences to track visitor numbers, share centrally for future measurement purposes building a baseline. • Implement year 1 pilot referral tracking system in year 2.
<p>Marketing & Communications: Deepening the promotion of Belfast’s neighbourhoods as authentic tourism experiences, to attract visitors seeking unique “love local” engagements</p>	<ul style="list-style-type: none"> • Integrate neighbourhoods within the overall marketing campaigns to strengthen the authentic local Belfast city and region offering. • Focusing on the theme of Homespun Pioneers, their stories, history and heritage, highlight and profile the unique experiences our neighbourhoods offer including historical sites, local cuisine and cultural attractions. • Develop tailored itineraries that highlight key attractions and experiences within the neighbourhood areas. • Showcase neighbourhood experiences within the new Visit Belfast website and across Visit Belfast social channels supported by the new Digital Marketing Strategy. • Where appropriate, engage with influencers and visiting press to amplify the authentic and unique experiences of the city’s neighbourhoods. • Through measures such as data analysis, social media engagement and visitor feedback, monitor and evaluate marketing activity.
<p>Partnership: Foster collaborations with local businesses, tourism organisations, community groups to work on marketing initiatives and events,</p>	<ul style="list-style-type: none"> • 10% increase in number of neighbourhood tourism partnerships. • Host a series of 4 Marketing Engagement workshops in Neighbourhood areas • Generate 20 new leads / sales calls to businesses in neighbourhood areas • Extend the profiling of City plus (RTP partners) areas to include some of the local “hidden gems”

enhancing the visibility of neighbourhood offerings	
Business Development Through Business Development outreach, use business and sales opportunities for cross promotion and support for the Neighbourhood tourism Initiative	<ul style="list-style-type: none"> • Continue to develop a range of Neighbourhood focused offers and experiences for business delegates for inclusion in VB delegate offers and marketing content. • Monitoring – through Salesforce track and monitor referrals made to neighbourhood areas and individual product providers with regards to Venues, site visits for partner and delegate programs, and bookings.
Travel Trade & Cruise Working with local Neighbourhood Tourism Suppliers and Travel Trade and Cruise Contracts to include more local and neighbourhood experiences in their itineraries and programmes for Belfast	<ul style="list-style-type: none"> • Identify tourism projects to be profiled in VB's business legacy and impact guide. • Neighbourhood promotion to be included at all sales calls to Trade at Exhibitions, showcases and webinars. • Develop additional Neighbourhood content for Trade Ezines and annual Neighbourhood ezine to Visit Belfast's Travel/ Trade Cruise database, consolidate and continue to develop on the year 1 curated neighbourhood itineraries. • Develop Neighbourhood content for Trade Ezines and annual Neighbourhood ezine to Visit Belfast's Travel/ Trade Cruise database. • Joint Cruise Fam trip with Cruise Ireland and Belfast Harbour for USA based cruise lines for Sept 2025, with neighbourhood experiences forming part of the Belfast offering. • Enhancement of Cruise Belfast website on Visit Belfast's new Simpleview platform to include profiling of neighbourhood experiences and itineraries.
Sustainability & Impact	<ul style="list-style-type: none"> • Sustainable travel and Sustainable choices featuring in communications related to promoting the City's Neighbourhoods.

7.3 Cruise

Introduction and context

Cruise tourism continues to be one of Belfast and Northern Ireland's success stories. Cruise Belfast, the sales, marketing and visitor servicing partnership between Visit Belfast and Belfast Harbour, has developed strong and profitable working relationships with cruise lines and operators for over twenty-nine years.

As an award-winning cruise destination, Belfast is one of the UK and Ireland's most welcoming and vibrant destinations. Over 1,400 ships and 2.25 million cruise visitors have experienced our friendly welcome since the first ship arrived in 1996. As number one Cruise Transit Port in the British Isles cruise visitors are a valued and crucial part of the growing tourism economy. Cruise tourism continues to be a catalyst for regeneration and economic growth in Belfast, supporting jobs and creating opportunities for our businesses and communities across the region. The significance of the cruise industry to Belfast and the wider region has been recognised in is two key areas:

- For the first time, cruise tourism is included in the Department for Economy's Tourism Action Plan (January 2025), recognising its role as both an economic driver and a means of distributing visitors across the region.
- Belfast Harbour has announced a £90 million investment in a new deepwater cruise and offshore wind facility at D3. This will support the growth of the cruise sector, attract larger vessels, and enhance the region's economic impact.

Cruise Belfast commissioned Oxford Economics to assess current and future cruise demand for Belfast. Some Key insights revealed in the study include:

- Cruise is projected to be the fastest-growing travel sector over the next five years.
- Cruise demand to Belfast will outpace other international travel, with an annual growth rate of 2.7% (compared to 2.2%).
- Oxford Economics forecasts a 100% increase in cruise-related direct spending from £23m in 2025 reaching £39.3m by 2035 and £56.2m by 2050.
- Belfast is the UK's busiest transit port, with embarkations projected to rise from 3.6% to 5.4% (2024–2027).
- Belfast is projected to welcome 180–200 ships annually by 2050.

The Cruise Welcome offered by Visit Belfast is a key part of the destination management and plays a significant role in the success of maintaining and sustaining inbound cruise tourism. The importance of resourcing this area of operations cannot be underestimated. In our Destination Management role, the Cruise Welcome team will work collaboratively with Belfast Harbour, local shipping agents, and Cruise Excursion companies to ensure the smooth running of operations at the Port and wider destination.

Key achievements 2024 Cruise Season

- 145 ships April – October (110 at D1).
- 1 large turnaround / 6 partial turnarounds.
- 6 Inaugural Calls including Cunard's Queen Anne.
- 259,376 passengers and crew.
- Regional dispersal, approx. 47% of all Cruise excursions were to the rest of Northern Ireland.
- Delivering £18 million to the local economy for the 2024 season based on passenger and cruise line spend.
- Signing of an MOU with Cruise Britian and Cruise Ireland.
- Enhanced Shore Side Welcome delivered 11 local cultural performances.
- Outreach day for careers in Cruise for Belfast Met students delivered with Ambassador line
- Successful sales mission to the States, meetings 8 major Cruise Lines and Cruise Excursion Company (SMS Marine).
- Attended 2 major Cruise Trade Shows (SeaTrade Med and SeaTrade Global).
- Delivered year two of Cruise Belfast's Cruise Sustainability Plan delivered.
- High cruise visitor satisfaction levels: 100% of cruise visitors surveyed were satisfied with their visit to Belfast/Northern Ireland.
- Strong propensity to return, 94% of cruise visitors surveyed would be keen to return to Belfast Northern Ireland.

Cruise: Key areas of activity 2025 -26

- Nurture relationships with cruise lines to encourage new and repeat calls.
- Provide warm welcome and Visitor Servicing for 144 ships and 320, 328 cruise visitors.
- Expected economic impact £23 million to local economy.
- Visitor servicing shore side "Welcome".
- Drive commercial sales to support operations.
- Lead on Cruise in destination management.
- Support the local cruise supply chain.
- Strategic planning on B2B sales activity for future cruise tourism growth on a UK/ Ireland, and Northern European basis.
- Delivery of a 'Cruise Ready' industry event in partnership with Belfast Harbour and Excursions Ireland ahead of the 2025 season.
- In partnership with Cruise Ireland deliver a Cruise fam trip to promote Belfast & N Ireland to key USA operators.
- Further develop authentic and immersive itinerary experiences for excursion companies.
- Deliver the gateway role through Visitor Servicing and B2B activity, with a focus on city attractions, neighbourhoods and the RTP areas.
- Deliver Year 3 of Cruise Belfast Cruise Sustainability Plan.

2025 Cruise Season overview:

- 144 ships between March – November.
- 31 Cruise lines berthing in Belfast.
- 7 Partial Turnarounds.
- 10 Inaugural Calls.
- 320,328 passengers and crew generating £23 million into the local economy.
- 74% of ships staying after 6pm - evening economy.

Actions by area of activity

Business Development

Aim: Developing and nurturing relationships with cruise lines to increase the number of Cruise calls.

Context: Work with Belfast Harbour to deliver a targeted sales plan with existing lines to increase future calls to Belfast, Northern Ireland. This will include tradeshow and calls to the major cruise lines in the USA, Europe and the UK, and in the delivery of a Cruise Fam for USA operators in September 2025.

Key outputs:

- Enhance relationships with existing and prospective cruise lines.
- Target new lines to position the destination as a new port of call through virtual sales calls/presentations, FAMs and attendance at Sea Trade USA and Europe and other industry platforms.
- Grow the number of full and partial turnarounds.
- Work collaboratively with Port of Liverpool to target additional calls through collectively working to provide more flexibility for accommodating Cruise lines itineraries.
- Work collaboratively with Cruise Ireland/ Cruise Britain to optimise scheduling of Cruise calls within the British Isles.
- Create and develop product updates, destination marketing support and curated itineraries for shore-ex and itinerary planners, incorporating more local and neighbourhood products and immersive experiences.
- Refresh of the Cruise Belfast website in 2025 on the new Simpleview platform.
- With Cruise Ireland deliver a Cruise Fam Trip to Belfast & Northern Ireland with major USA Cruise lines
- Belfast Harbour delivering a European Ports Event in Belfast in July 2025.

Visitor Servicing & Destination Marketing

Aim: Provide a warm welcome and world-class visitor information service to cruise visitors arriving in Belfast in 2025, working with Belfast Harbour and Cruise partners to deliver an excellent visitor experience on arrival, departure and in the destination.

Context: Continue to engage with the main cruise excursion companies and shipping agents, Belfast Harbour Police and Harbour Security, experiences, tours and transport providers, all of whom have a key role to play in delivering a high-quality tourism experience on the ground both in the Port, the city and the wider destination.

Key outputs:

- Maximise footfall and spend to tourism partners across Belfast and Northern Ireland; and by doing so, optimise the economic benefit from the 144 cruise calls generating £23m spend into the local economy.
- Work with the local cruise supply chain to facilitate the delivery of a best-in-class cruise experience.
- Ensure that Visit Belfast maximises commercial income streams to support Visitor Servicing operating costs.
- A visitor focused approach will ensure high visitor satisfaction levels which will impact on customer feedback measured by the cruise lines.
- Visit Belfast to oversee landside operations including the management of the Cruise Shuttle service and the team of Cruise Welcome Ambassadors.
- Provide a shore side welcome for first time visits, and some key larger ships, providing entertainment that highlights local culture and music.

KPIs 2025-2026

2025 Support Belfast Harbour in retaining and growing cruise calls to Belfast and NI.	<ul style="list-style-type: none"> • 144 ships. • 320,328 Cruise Visitors. • £23m economic impact.
Generate commercial revenue from cruise retail and commercial platforms in 2025	<ul style="list-style-type: none"> • Included in the overall Visitor Servicing target of £878, 437.
Maintain cruise visitors' satisfaction levels.	<ul style="list-style-type: none"> • 86% very satisfied and 14% satisfied.
City, Neighbourhood & Regional spread of visitors	<ul style="list-style-type: none"> • Work with cruise lines to develop itineraries that include gateway and neighbourhood experiences.
	<ul style="list-style-type: none"> • Meet with cruise supply chain partners. • Organise pre and post season briefings.

Collaborate with the local Cruise Supply Chain	<ul style="list-style-type: none"> • Organise a Cruise Market Educational webinar.
Cruise Sustainability Plan	<ul style="list-style-type: none"> • Deliver year 3 action plan.
Accessibility & Inclusion	<ul style="list-style-type: none"> • Ensure shuttle buses are fully accessible. • Taxis at cruise taxi ranks are required to accommodate accessible needs of passengers. • Accessibility and inclusion training for all Visit Belfast staff servicing cruise ships.

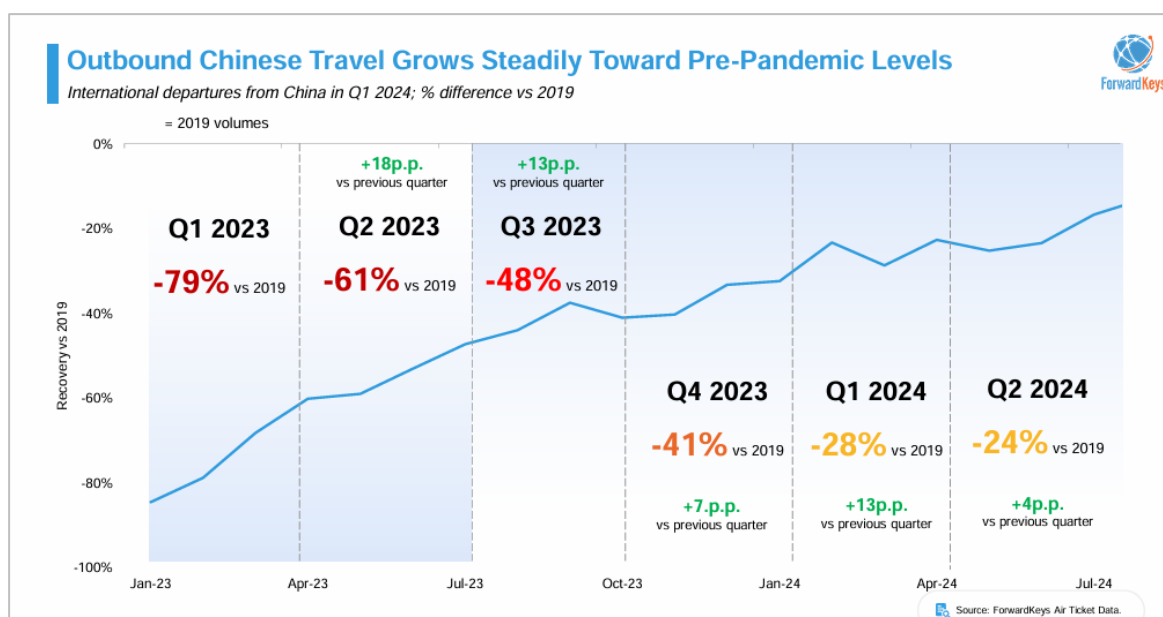
7.4 Travel Trade

Introduction and market context

2024 was a stable year of growth for the UK's global inbound sector. UKinbound research shows that 2024 group travel numbers to the UK were 95% of pre-pandemic levels by visitor volume and 92% of spend when adjusted for inflation.

The USA continues to be one of the best performing destinations for the UK, with 30% of UKinbound operators continuing to experience growth from this market, however this has slowed down slightly over the course of 2024.

Additionally, the Chinese market showed signs of recovery for operators, with 12% (just over 1 in 10) members reporting growth from this market in 2024. This is supported by research from ForwardKeys that shows the steadily return to growth from the Chinese market.



A steady influx of business during 2024 has bolstered confidence levels amongst the sector with 63% of UKinbound operators reported feeling confident about 2025 demand. This is down slightly from the peak of 73% in 2023 and when asked to consider key barriers to growth, 59% of UKinbound respondents stated economic conditions, such as rising costs, while 29% cited the UK's international competitiveness. Staff recruitment and retention also ranked highly, with 23% stating it was a key concern.

Rising flight, accommodation, F&B and staff costs for operators have been compounded by the introduction of the ETA (electronic visa authorisation) and more recently the 60% proposed price increase from £10 to £16 per person which could impact the UK's competitiveness for global inbound business.

Outlook

Tourism Ireland estimate that Global Inbound visitors to GB and Ireland are estimated to be worth £200m per year and 500,000 visitors to the island of Ireland per annum. ITOA (Irish Tour Operator Association) operators also deliver over 730,000 annual visitors to Northern Ireland. It is likely that these figures underestimate the total value of group travel and Tourism NI is undertaking further research in 2025 to measure the current value and potential growth of the travel trade market for Northern Ireland.

Demand for group travel into Belfast city region remained strong during 2024 with over £2m of travel trade leads generated from Visit Belfast's leisure trade sales manager which is ahead of target for the year.

The Belfast city region has strong 'destination appeal' amongst key travel trade markets however operators have increasingly expressed concerns around availability and costs of accommodation in the city which has the potential to impact the level of group business placed by key operators. Visit Belfast will have to work closely with operators and industry to strike the balance between profitability and viability of travel trade itineraries and programmes into the city.

In 2025, the global tour operator industry is experiencing several notable trends driven by evolving traveller preferences and technological advancements:

Sustainability and Eco-Friendly Travel

Travellers are increasingly prioritising environmentally responsible options. Tour operators are responding by offering eco-friendly packages, such as modern coach tours that provide luxury and significantly lower carbon emissions compared to air travel. Premium operators have upgraded their services to include spacious seating and onboard entertainment, making coach travel a more attractive and sustainable choice.

Personalised and Immersive Experiences

The growing trend for personalised and immersive travel experiences is here to stay. Travellers are seeking unique, culturally rich activities that allow deeper connections with destinations. Tour operators are curating specialised itineraries that cater to these desires, offering authentic local engagements and off-the-beaten-track adventures.

Integration of Artificial Intelligence

Tour operators are utilising AI to enhance customer service, personalise travel recommendations, and optimise operations.

Growth of Small Group and Niche Travel

There's an increasing preference for small group tours and niche travel experiences. Travellers are seeking more intimate and personalised journeys, often focusing on specific interests such as culinary tours, wildlife safaris, or wellness retreats. Tour operators are catering to this trend by offering specialised packages that provide deeper engagement and unique experiences in order to drive revenue growth and profitability.

Expansion into Emerging Destinations

Tour operators are developing their programmes to include emerging and affordable destinations. For instance, companies like TUI are increasing their presence in Asian countries such as Vietnam, Malaysia, and China and other boutique operators are tapping into the 'destination dupe' trend in order to deliver greater value and experience and to avoid overcrowding.

Overall, the outlook points towards more responsible, personalised, and technologically integrated travel experiences, as tour operators adapt to meet the evolving preferences of modern visitors.

Visit Belfast - Key Areas of Activity

Travel trade remains an important market segment for Visit Belfast and its industry partners. The Leisure Trade Sales Manager is responsible for cruise and leisure trade, promoting the Belfast city region as a must visit destination for the group market and generating and referring opportunities to Visit Belfast partners.

Visit Belfast has an important role in promoting the depth and breadth of group product on offer across the city region; in particular, the small-medium sized experiences, attractions and suppliers. Working at a destination level is a much more effective way for smaller partners to gain visibility and traction with tour operators. For the large attractions and hotels with established relationships and contracted rates in place, Visit Belfast has as secondary role providing destination support where required.

Visit Belfast also has an important destination management role for current and prospective inbound operators seeking advice acting as a single point of contact for destination queries and updates, introductions to partners, itinerary planning, promotion and delivery.

In addition to in-market activity, ezines and enquiry management, Visit Belfast has an account management structure in place to manage its key operators, divided into gold, silver and bronze and an engaged travel trade database of over 4,500 contacts across more than 2,400 accounts.

Key travel trade activity include:

- Representing Belfast city region and Visit Belfast partners at in-market tradeshow, exhibitions and buyer events for travel trade – e.g. Britain and Ireland Marketplace, World Travel Market, Meet the Trade Dublin, TI Germany, BeNe / Nordics workshops, TI/TNI Meet the Buyer and ITOA events.
- Destination marketing and promotion for groups – itineraries, presentations, product updates, quarterly travel trade ezine.
- Lead generation and partner referrals.
- Account management of key operators - destination management support and enquiry handling.

Key aims for 2025-26

- Key account management of travel trade partners, supporting on accommodation queries, product knowledge and refreshed itineraries that appeal to the discerning traveller.
- Market development to capitalise on increased demand from the US, Canada and China and creating opportunities to showcase smaller Visit Belfast partners.
- Curation and promotion of Belfast city region's luxury and premium offer in collaboration with Tourism Ireland, Tourism NI and industry partners.
- Further development and promotion of Belfast city region's neighbourhood offer for the group market.
- Redevelopment of the Travel trade section of the visitbelfast.com website as part of the company digital plans.

Travel Trade KPIs 2025/6	
Travel trade leads value	£2m economic impact
	20,000 bednights
	8,000 daytrips
Travel trade buyer engagements	200
Travel trade partner referrals	175
Travel trade database	2,468 tour operators 4,700 contacts (of which 3,882 are emailable)

7.5 Business Events

Introduction and market context

The PCMA (Professional Convention Management Association) 2025 Forecast report points to solid growth for the industry with increasing budgets and an optimistic outlook amongst meeting professionals, despite challenges such as rising costs and geopolitical uncertainty.

CWT GBTA 2025 Global forecast reports robust demand for meetings and business events during 2024 spend now exceeding 2019 levels and with an annual compound growth rate of 7% expected between 2025 and 2028.

There are, however, variables and market shifts at play – from rising costs, organisations measuring the environmental impact of their global travel and events, and executives prioritising wellbeing post-pandemic.

Sustainability remains a key driver for all MICE segments incentive, corporates and associations but in a more recent development, US planners are now also prioritising sustainability. PCMA research shows that 60% of US event organisers now include sustainability in RFPs, a significant increase on 31% in the prior year.

AMEX GBT Global forecast for meetings and events reports planners will increasingly look to second and third-tier destinations in an effort to economise and counter rising travel, venue, F&B and accommodation costs.

Rising event costs are also a growing concern for associations with ICCA research highlighting 74% of event organisers consider cost as the most crucial factor in destination selection followed by venue and accommodation capacity at 61%.

Highlighting Belfast's high quality but affordable business events offer alongside the city's strong sustainability credentials will be key to capitalising on market growth opportunities in 2025-26.

Key areas of activity

Visit Belfast is the city and region sales team responsible for attracting and hosting business events into Belfast and Northern Ireland. In broad terms, activities cover:

- Destination promotion for business events.
- Lead generation/business development.
- Sales/conversion activities.
- Destination management (after-sales).

Area of Activity	Actions include:
Destination promotion for business events	<ul style="list-style-type: none"> • Destination Marketing – development of the Belfast business events brand positioning, destination presentations and ezines, management of the business events website and social media channels. • In-market promotion – promoting Belfast as a business event destination at tradeshow, exhibitions and industry events, organising client events and sales missions - GB, ROI, Europe and North America. • Ambassador circle network management – recruiting new and developing relationships with existing ambassadors (business, academic and medical leaders) to attract strategic events to Northern Ireland – (1,400 ambassadors, 5 sector advisory panels).
Lead generation and business development	<ul style="list-style-type: none"> • Lead generation and sales research. • Bids/Proposals/Enquiry management – development of city bids, proposals, RFPs and presentations as well as management of inbound business event enquiries/referrals. • 20% increase in corporate/agency RFPs.
Sales and conversion activities	<ul style="list-style-type: none"> • Secure business events for the city worth 37,000 delegates, 100,000 bed nights and £37m in economic impact in partnership with industry. • Sales/pipeline management – prospecting and sales calls, developing relationships with key event organisers, customer relationship management and pipeline management. • Site inspections and FAMs – hosting and organising site visits and FAMs for prospective clients. • Promotion and management of the Belfast and NI Conference Support Scheme – scheme promotion, preparing applications for panel decision, liaising with clients, issuing of letters of offer, management of claims and post event evaluation.
Destination management (after sales)	<ul style="list-style-type: none"> • Provide a destination and account management service for all forward booked events into Belfast (approx. 150-200 events) acting as a single point of contact for all destination enquiries from incoming event organisers. Support includes: <ul style="list-style-type: none"> – Delegate marketing and information – Visit Belfast blogs/guides/content on tours/attractions things to do, extend your stay, welcome video to promote the conference, FAQs, tours/attractions, getting here and getting around. For larger events, pop-up visitor servicing desk to support the event when it arrives in Belfast. – Working with industry partners on delegate offers and promotions to encourage delegates to explore Belfast and NI when here for the

	<p>conference, plus extender / repeat visit hotel offers and delegate literature.</p> <ul style="list-style-type: none"> – Sourcing local suppliers and partners to service business events (as well as dinners, entertainment). – Coordinating requests for local speakers, potential sponsors, delegates and exhibitors working with the ambassador circle and local stakeholders. <ul style="list-style-type: none"> ● Sustainability and impact: <ul style="list-style-type: none"> – 1:1 guidance with clients providing advice and ideas to make their conference in Belfast more sustainable. – Development of the Visit Belfast sustainable events framework and legacy/impact guide – Sustainability resources and toolkits, carbon measurement and offsetting options. ● Post event evaluation surveys and feedback. ● Conference support scheme application post event claims management ensuring T's and C's of the Letters of Offer are met.
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Key areas of strength to build upon

- **Leveraging the region's sector strengths** to attract the 'right' events to Belfast and Northern Ireland – focusing on those sectors where NI is leading, the most likely to convert; with the greatest potential to deliver economic, research and legacy benefits for the region.
- **Maximising our strong GB market position for associations and corporate business**
- **Capitalising on increased US and European in-market and FAM activity** through Tourism Ireland role in business events for meetings and incentive business.
- **Harnessing Belfast's largest sales channel for business events** – The Ambassador Circle network of 1,400 leaders and five sector advisory panels. (79% of all NI business events are confirmed with support from an ambassador).
- **Promoting Belfast's sustainability credentials and support** – which is a critical element of Belfast's business events proposition and a USP over other destinations in its' competitor set.
- **'Above and beyond' approach to destination management support** – which is frequently cited as a USP by event organisers given that Belfast is an unfamiliar destination to them, and they lack the local knowledge and established supplier relationships. As their destination partner, Visit Belfast also uses the destination management role to upsell and cross-sell, promoting local suppliers and experiences.
- **Data driven sales management and business development** – as a target-driven team with a comprehensive CRM system and sales management processes in place, Visit Belfast can leverage its sales pipeline, 7,500 strong database of PCO's, agencies, associations, DMCs, ambassador network and its social media following to drive destination awareness and consideration levels and support sales activity.
- **Continuing to develop strong partnerships and collaboration with industry partners involved in business events.**

Key aims and development areas for 2025-26

In 2025-26, Visit Belfast will deliver a comprehensive calendar of sales and marketing activities to secure and service business events for the region in partnership with industry partners, Tourism Ireland and Tourism NI. Strategic areas of focus include:

1. Supporting Tourism NI/TI in the development of an **action plan for delivery of the NI business events integrated strategy** as set out in the 10-year tourism vision and action plan
2. **Growing demand from the corporate and agency market** – Increase RFPs and buyer engagements by a further 20%
3. **Increased in-market activity in Europe and North America** – growing buyer engagements in these markets working in partnership with Tourism Ireland/Tourism NI.
4. **Harnessing the power of the ambassador network to increase leads, engagement and strategically develop the network** – targeting underrepresented areas (NI wide ambassadors, future/emerging leaders, technology, food/drink and business and professional services sectors.
5. **Investment in digital and content marketing to increase awareness and engagement around Belfast as a business events destination** – Increase social media followers, ezine subscribers and digital engagement on business event channels.
6. **Strategic development of key partnerships** with key business event stakeholders including ICC Belfast, Queen's University, Ulster University, Invest NI, Tourism NI, Tourism Ireland, Titanic Belfast and wider industry.

The value of business events

To develop a robust measure of economic impact for business events for Northern Ireland requires significant investment in research. Tourism NI has partnered with Visit Britain on a delegate expenditure research project to better understand business visitor spending. The final delegate spend figures are not yet finalised but preliminary findings have highlighted the significant opportunities to maximise spend and visits from business developments:

- 77% of business visitors to Belfast would definitely return as a leisure visitor = Bleisure opportunity.
- 72% of business visitors to Belfast would definitely return to invest or grow relationships = economic impact and legacy opportunity.
- 78% of business visitors to Belfast said they would definitely return to attend another business event = repeat business opportunity.
- 9% of business delegates to Belfast brought a partner, friend or spouse = additional spend opportunity.

Visit Belfast will work with its digital team and TNI in 2025-26 to investigate how innovative use of digital could allow the destination to target business delegates with extender and returner campaigns to maximise spend for the region.

Visit Belfast will also work with TNI and industry on phase 2 of business events research to better understand the total economic impact of business events. The current multiplier used by Visit Belfast, TNI and BCC accounts for direct spend only. It does not factor in event organiser spend in the destination such as venue hire, gala dinner costs, transport and entertainment. As a result, it is likely that the economic impact of business events is being unreported.

There is also a need to work with event organisers, local ambassadors, Invest NI and both Universities to better capture the non-tourism benefits of business events in Northern Ireland.

While this research is ongoing, an interim economic impact multiplier is being used by TNI/VB/BCC and ICC Belfast.

KPIs and measuring success in 2025-26

The team will focus on further increasing YoY sales performance by 9%. In addition, a number of additional KPIs are proposed to drive delivery of the strategic aims set out above.

Headline KPIs – Business event sales	
Delegates	37,000
Bed nights	100,000
Economic impact (SRI multiplier)	£37m
Productivity KPIs	
Leads generated	£130m
Bids/proposals submitted	£100m
Buyer engagements	2,000

7.6 Sustainability and Impact

Introduction and Context

The commitment and leadership shown by Visit Belfast, its board, Belfast City Council and industry partners has been transformational in Belfast's journey towards a more sustainable tourism model. Belfast is now ranked 9th globally and the highest ranked destination in the UK and Ireland for sustainability as assessed by the Global Destination Sustainability (GDS) Index 2024. There is now widespread buy-in from the industry on sustainability issues with a critical mass of businesses taking and accelerating action in this area.

Through its three-year New Horizons strategy (2024-27) Visit Belfast has adopted a triple-bottom line approach to the measurement of tourism economic, environmental and social impact. It has taken bold steps towards a more regenerative tourism model, leading pioneering initiatives including the Belfast Tourism Carbon project and delivering the first resident sentiment survey towards tourism. It has also developed an industry sustainability survey to establish new measures of success for tourism including funds raised for charity and social causes alongside the number of businesses adopting sustainable practices. These projects will help inform Visit Belfast's operational plans for the remainder of the strategy to 2027.

While sustainability was previously considered a key competitiveness issue for B2B segments such as business events, travel trade and cruise operators, there has been a notable rise in consumer expectations around sustainability as well as growing niche eco-tourism segments driven by rising numbers of Gen Z travellers.

Visit Belfast has now embedded sustainability into all of its decision making and continues to build sustainability capacity across the organisation to inspire action across all areas of its business.

25-26 will see Visit Belfast continue to accelerate action on sustainability with bold leadership, creative solutions and thinking regeneratively about the role that tourism can play in our economy, environment and community.

Key achievements 2024-25

- Belfast is ranked 9th/100 destinations globally for sustainability (Global Destination Sustainability Index - GDS 2024).
- Belfast is the highest performing destination in the UK and Ireland in 2024 according to the GDS Index.
- Top 10 sustainable travel destination in the world – (TripAdvisor 2024 Travelers Choice Awards).
- Top 20 sustainable destination for 2024 – (Forbes).
- Developed Belfast's first ever resident sentiment survey which showed very strong support for tourism amongst locals. 92% believe that tourism is beneficial for Belfast, 93% say tourism allows people to learn about the city's history and culture, 91% agree tourism supports local businesses to open/remain open, 87% say tourism creates a more vibrant

Belfast with more things to see and do and 84% of locals interested in taking part in more tourism activities.

- 95% of business delegates to Belfast in 2024 felt that city supported them very/fairly well to have an environmentally responsible stay (Visit Britain/TNI/Visit Belfast delegate spend research 2024).
- 98% of business delegates to Belfast in 2024 reported that the venue and event organisers have done very/fairly well to make the event as sustainable as reasonably possible. (Visit Britain/TNI/VB delegate spend research 2024)
- 76 event organisers, travel trade, cruise and industry partners provided with 121 sustainability support by Visit Belfast.
- Maintained high certification levels in the accommodation sector with 76% hotel bedrooms in Belfast holding a third-party sustainability certification.
- Secured a Green Tourism Gold award for Visit Belfast.
- Supported the Belfast Sustainability Forum led by ICC Belfast to launch the first multi-venue re-usable cup pilot project to remove 2m of single use plastic cups for Belfast's entertainment venues and remove 40 tonnes of carbon for the city. This initiative is also key to supporting Belfast's competitiveness in attracting global artists and working with entertainment promoters.

Key activities

Visit Belfast's sustainability and impact manager and director undertake a wide range of activities in partnership with other departments, BCC and industry partners including:

- Championing and supporting sustainable tourism practices across our industry partners and city.
- Leading the annual Belfast GDS Index assessment process with input from BCC and industry partners.
- Providing 121 sustainability support, guidance and resources to influence Visit Belfast's event. organisers, tour operators, cruise lines and industry partners.
- Developing and promoting Visit Belfast's Changing the Menu for Good initiative.
- Development of the Visit Belfast's impact and legacy guide for business events.
- Creation of sustainability content and resources for destination marketing and supporting digital.
- Development and delivery of the Cruise Belfast sustainability plan (year 3) in partnership with Belfast Harbour.
- Supporting ICC Belfast's Sustainable Venues Forum on pilot projects and development work to accelerate collaboration and action on sustainability amongst city venues.
- Supporting industry and clients on carbon measurement and reduction
- Adopting new ways of measuring impact (economic, social & environmental) across the breadth of the organisation.
- Build sustainability capacity and embed sustainability knowledge throughout Visit Belfast.
- Developing and promoting Belfast's sustainability story (across leisure, cruise and business tourism) woven into leisure content, digital comms, the new visitbelfast.com website and key visitor servicing touchpoints.

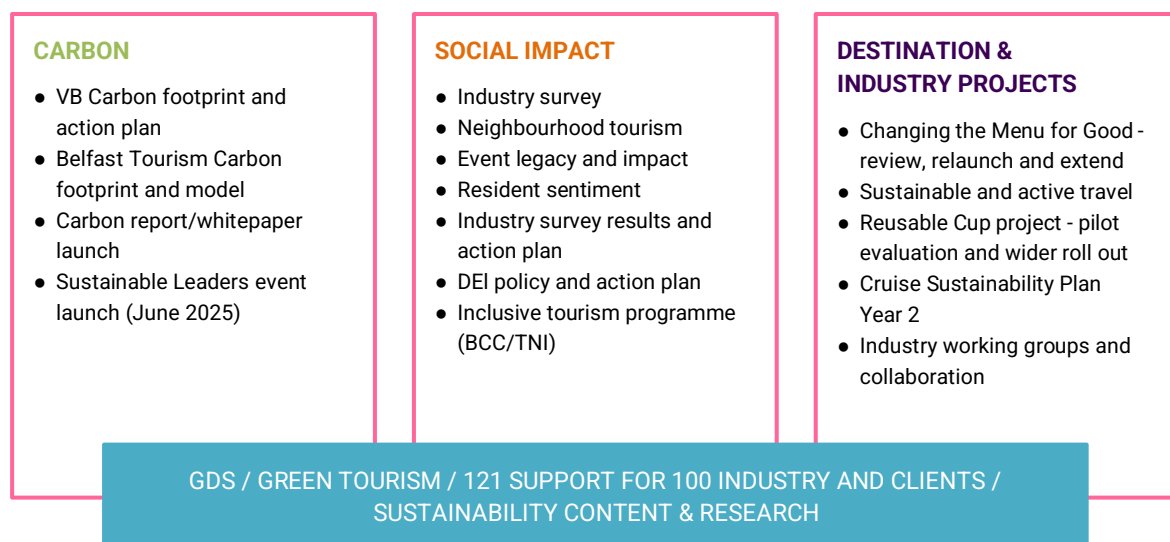
- Promotion of responsible visitor behaviour through curated itineraries, local sustainability heroes, easy ways to reduce environmental impact e.g. sustainable travel options, events and maximising social benefit.
- Prioritising neighbourhood tourism across the organisation and delivery of a company-wide action plan.
- Better measurement and communication of our impact with key stakeholders in line with Visit Belfast's sustainability policy.
- Delivery of Visit Belfast's DEI policy and championing DEI best practice across our industry.
- Baselining the environmental, social and economic actions being undertaken by our industry and promoting and celebrating best practice.
- Delivering the carbon baseline study in partnership with BCC and industry to inform decarbonisation interventions and plans.
- Baseline Visit Belfast's carbon impact and put in place improvement plans.

2025-26 Key Priorities

Many of the strategic priorities and deliverables within the New Horizons strategy require multi-year delivery. Three major projects were launched in 24-25 (Belfast tourism carbon project, resident sentiment survey and industry sustainability survey) which will work their way into 25-26 plans.

As a DMMO, a measure of sustainability success is that sustainability and impact KPI's are now fully embedded in in Visit Belfast's companywide headline KPI's as part of a triple-bottom line approach to measuring success. Sustainability initiatives and deliverables are also referenced across the organisational business areas but the diagram below summaries our key focus for 25-26.

2025-26 Focus



visitBelfast