

visitBelfast

REBUILDING CITY TOURISM

2021-24

**3-Year Recovery Strategy
& 2021-22 Operational Plans**

SHORTENED VERSION

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REBUILDING CITY TOURISM 2021-24

Covid-19 has been nothing short of a hammer blow to the world we live and work in.

Belfast, like other cities across the globe, has experienced the full range of negative effects brought about by the global pandemic - virtually no aspect of our society has gone untouched since its onset in early 2020. Notwithstanding the immeasurable pressures on our health services, the sector quickest and hardest impacted by Covid-19 has been travel, tourism and hospitality, halting the decades of hard graft and growth that saw the City's tourism industry at last flourish and now jeopardising the 21,863 jobs and livelihoods within it.

New variants of the virus continuing to spread means that national and international tourism is again at a standstill. However, the implementation and roll out of the vaccination programme here and in our source markets, particularly Great Britain and the Republic of Ireland, along with other mitigating measures, offers much confidence and optimism for future recovery and the enabling of international travel to safely return when it's right and safe to do so.

The importance of tourism to the city economy and Belfast to the regional visitor economy cannot be underestimated. Twenty years of tourism growth not only brought many millions of visitors to our city, but it established hundreds of new business enterprises, and with that, many thousands more job opportunities for our resident population. So it is vitally important that we begin to plan for recovery now.

The series of lockdowns have provided time to pause and allow us to reimagine Belfast as a place to live, work and visit in a 'post-Covid' world. Our ambitions remain the same, but viewed through a lens of different priorities, acknowledging the need for Belfast to 'build back better', Tourism has an important role to play.

If we want Belfast to remain relevant in a constantly changing market place, and remain attractive, we need to collectively rethink what a successful tourism destination looks like and how, as a sector, we can demonstrate that tourism can and will be a force for good - contributing not just economically but societally and environmentally.

Visit Belfast's three-year recovery plan *Rebuilding City Tourism 2021-24* sets out a new direction of travel, illustrating a step change in our approach to our marketing and visitor servicing activity, and the generation and measurement of tourism success for the betterment of our businesses, our employees, our residents and our city.

Partnership has been a central pillar of Visit Belfast; and by facing the challenges together we will succeed in restarting and rebuilding tourism to Belfast and the wider city region.

The Belfast City Region is well placed to recover – we have world-class attractions, hospitality and food, a wealth of unique visitor and cultural experiences and a determination to succeed against the odds. Resilience and innovation is in our tourism DNA.



Kathryn Thomson
Chair



Gerry Lennon
Chief Executive

1. TOURISM POST COVID-19

Market Analysis... Rethinking Tourism

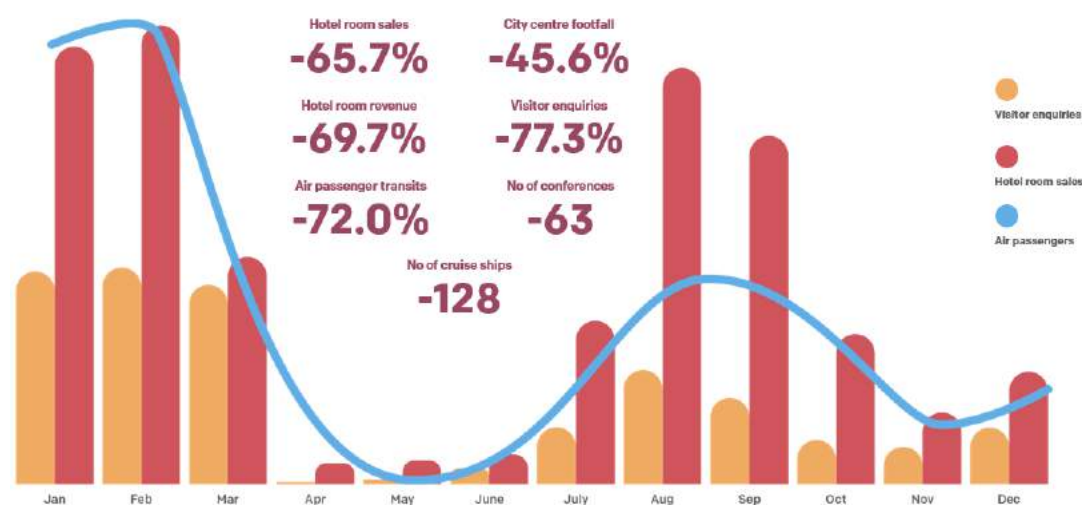
Covid-19: A Hammer Blow to Tourism

No other industry or sector has been so profoundly affected by the Covid-19 pandemic than the travel, tourism and hospitality industry.

Globally, the UNWTO estimate that international arrivals in 2020 fell by 74% amounting to a loss of \$1.3 trillion in tourism receipts. It also estimated that up to half of those employed in tourism worldwide have or will imminently lose their job. Closer to home, Visit Britain expect inbound tourism to the UK to have dropped by 76% in visits and 80% in spend whilst the Irish Tourism Industry Confederation (ITIC) estimate an 81% decrease in tourism receipts.

The picture in Belfast was no less stark. As illustrated below, little or no free movement, no conference business nor cruise ship visit from March impacted significantly on key tourism metrics - city centre footfall, hotel room sales and air passenger transits falling between 45% and 72% compared to 2019 levels.

The Impact of Covid-19 on Belfast Tourism 2020



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

Belfast Tourism Central to the Regional Economic Recovery

Emerging from 30 years of conflict, Belfast and Northern Ireland's tourism industry has arguably shown more resilience than many other tourism destinations of recent years. Generating £417m tourism spend and supporting 10% of city jobs in 2019, Belfast's tourism growth and development have seen the city's tourism industry crucially emerge both as a key pillar of the city economy, and also of strategic importance to the wider visitor economy of Northern Ireland, as shown below.

20 Years of City Tourism Growth



Sources: NISRA, STR Global and Visit Belfast

Belfast City Region's Strategic Importance to Northern Ireland Tourism



Sources: NISRA, Tourism NI and Visit Belfast

As the regional driver for the Northern Ireland visitor economy, the Belfast City Region will play a significant and important part in any regional recovery plans.

Tourism Outlook

Despite the outlook being far from certain, tourism can and will contribute to the economic and social wellbeing of the city again; and no other industry has the potential to create jobs quickly and provide the economic impetus for a wider economic recovery than tourism. Countries that were able to effectively control the spread of the virus saw a rapid recovery of both leisure and business travel, initially domestic but with additional measures, leading to the reopening of international travel.

While it remains unclear what the longstanding or permanent changes Covid-19 will inflict on the global tourism sector, growth is expected in the medium term. The UNWTO expect to see international

arrivals begin to recover by the second half of 2021 estimating a return to 2019 levels within two to four years. Whilst 'not guaranteed', HSBC Global Research concurs with this outlook.

For UK and Irish tourism, there is cautious optimism albeit caveated heavily with the ongoing successful roll out of national vaccination programmes; the need to harmonise international travel protocols essential for restoring confidence in travel; and the removal of quarantine restrictions at the earliest and safest opportunity.

Visit Britain forecast inbound tourism to remain at a very low level during the early part of 2021, followed by a gradual recovery from the summer and autumn months, estimating 11.7m inbound visits by the end of the year – despite this being a 21% increase on 2020, it is still only 29% of 2019 levels. Domestically, they forecast a greater bounce back, but still below the levels of 2019, forecasting domestic overnight spend to increase by 82% to £18bn compared to 2020 (equating to 73% of 2019 domestic overnight spend). Similarly, ITIC expect domestic travel to be the mainstay for tourism in the Republic in 2021 with 2022 the year where real recovery begins.

What is in no doubt, from the research undertaken by a wide range of agencies across the world, is the underlying want to travel again. Nearly a half (47%) of global travellers surveyed by TripAdvisor said they are planning to travel in 2021 – the most eager being travellers from Great Britain and Germany. In spite of Tourism Ireland's Covid-19 benchmarking research reporting low levels of comfort in booking a trip (particularly from Europe) their research echoes the fundamental desire to travel and the attractiveness of the Island of Ireland as a travel destination remains.

Research also shows that the leisure segments of holiday/short breaks (particularly from experienced and Gen X travellers) and those visiting friends and relatives (particularly those who were unable to do so in 2020) will be the quickest segments to recover.

The emergence of virtual technologies is likely to see an initial downward trend in business travel. However leading expert McKinsey & Company expect recovery from 2023 and beyond. Virtual technologies have also been embraced by conference organisers with hybrid models gaining popularity, reflecting the business events sector innovation and resilience. The industry has also developed Covid-secure guidelines, re-designed meeting spaces and formats, invested in technology and expertise to meet demand for virtual and hybrid meetings and played a crucial role in keeping companies and organisations connected during an unprecedented time.

There has been a slow but safe return to cruising in Europe. Two of Belfast's regular visiting lines, MSC and TUI, have invested heavily in safety and as a result were able to deliver a late summer cruise season in 2020. MSC sailed around Italy and the Canaries, safely carrying 30,000 passengers in total or 2,500 passengers on board per cruise whilst TUI offered short stay scenic cruises around Germany safely carrying a total of 40,000 passengers or 1,200 passengers on board per cruise. MSC has recently announced a return of cruises to Greece in April.

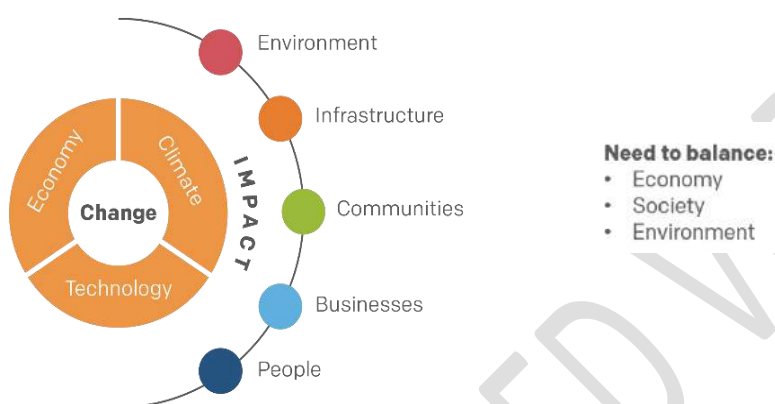
Belfast Well Placed for Recovery

Belfast's relative youth as an urban tourism destination within the global market, places the city in a more favourable position for significant recovery compared to more 'international' destinations within the UK and Ireland. Where international arrivals from Europe, North America and beyond would be the mainstay of Dublin, Edinburgh and London's arrivals, Belfast's source markets remain Great Britain and the Republic of Ireland.

Similarly as the world emerges from lockdown, familiarity of destination will help allay any lasting fears – research conducted in Britain by Visit Belfast in 2018 noted 67% of those who had visited said they would definitely return. Coupled with a third of Belfast’s overnight visitors choosing to come to visit friends and relatives (NISRA LGD Tourism Statistics 2019) there is already a significant number of potential visitors positively predisposed to Belfast.

However, the pandemic has had a lasting impact on traveller behaviour, preferences and values. Tomorrow’s tourists will be more culturally and environmentally aware, more health conscious, who seek unique, indigenous and sharable experiences in destinations that demonstrate support for its people, place and planet – representing a new paradigm in tourism development and marketing as illustrated:

The New Paradigm for Tourism



Rethinking Tourism, Building Back Better

Even before Covid-19, consumers and policy makers were starting to take a more critical look at tourism and its potential impacts. The pandemic has brought greater scrutiny on ensuring tourism recovery is not only economically sustainable but there needs to be a greater emphasis on environmental and socio-cultural sustainability too (as identified by the OECD Tourism Paper 2021/01). Developing a regenerative model as illustrated needs to be at the heart of the tourism sector and mainstream across tourism businesses, organisations and policy makers.

A Regenerative Model for Tourism



The enforced pause on tourism operations, has provided the sector with the opportunity to better align itself with city and regional plans aimed at not only economic recovery but longer term socio-cultural needs and climate action that in turn help improve the competitive positioning of Belfast in the international market place.

In tandem with city development plans, Visit Belfast will adopt new and innovative approaches to its destination sales, marketing and communications and visitor servicing, utilising the City's core values and place branding to reposition itself, promoting inspirational experiences to enhance competitiveness to deliver growth that will benefit residents, businesses and visitors equally.

While the full impact of Covid-19 is as yet unknown, what is clear is that any city and regional recovery will need new and innovative approaches in an increasing complex set of market conditions.

2. REBUILDING CITY TOURISM 2021-24

Building Back Better

Visit Belfast: Next Generation DMO

As the city's official destination marketing organisation (DMO), and a public, private and community partnership that is not for profit, Visit Belfast will continue to work with Belfast City Council, Tourism NI and Tourism Ireland and 500 private sector businesses, our strategic and corporate partners and local community partners in the delivery of integrated and effective city marketing, sales and visitor servicing activity to rebalance the disproportionately negative impact that Belfast has suffered as a result of Covid-19 and the necessary successive lockdowns to city businesses, jobs and its visitor economy.



Visit Belfast's marketing and operational plans are focussed on supporting the sustainable recovery of tourism, promoting the digital transition and moving to a greener and more inclusive tourism model; one that re-thinks what a successful tourism destination looks like.

Guiding Principles & Objectives

Whilst Visit Belfast's objective remain the same, moving forward, sustainability and inclusive growth will be at the heart of the organisation and its outputs.

Guiding Principles

- Environmental sustainability
- Inclusive growth
- Partnership/collaboration
- Flexible/adaptable
- Visitor/citizen focussed

Objectives

- Drive**
overnight trips, day visits and spend
- Encourage**
repeat visits and increase visitor satisfaction
- Spread**
the benefits of tourism across the region
- Champion**
the Belfast destination brand

Policy Framework

The strategies illustrated below have informed and will continue to influence Visit Belfast's plans for recovery over the next three years:



In 2019, Belfast City Council agreed a new ten-year cultural strategy, *A City Imagining 2020-2030*, to drive cultural transformation in the city. For the first time, this strategy brought together under one compelling vision, a number of areas including tourism, culture, heritage, arts, events and festivals.

Following on from this, a new 10-year tourism plan is now being developed by Belfast City Council aimed at developing and supporting the economic, social, environmental and cultural values of the destination. Visit Belfast is committed to supporting the successful delivery of the plan which will set out a shared vision for tourism and support a number of strategic pillars, likely to encompass the following key areas:

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

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

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

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

Informed by the policy context above, Visit Belfast has re-purposed and re-structured its operations and activities to adapt to the changing environment and operating context it finds itself. These activities aim to maximise efficiencies and prioritisation of resources to facilitate an appropriate and rapid response to dynamic market, customer and operating challenges, including:



While survival has been the over-riding focus of the City's tourism businesses over the last twelve months, as the City's DMO, Visit Belfast has been developing carefully crafted plans in order to deliver agile and co-ordinated marketing and sales moving forward, in order to rebuild the city's tourism economy, address changing visitor behaviours and preferences and support tourism operators both large and small:

Changing Visitor Behaviour & Preferences

- Socially and environmentally conscious traveller
- Health and wellbeing
- Love local

Dial Up/ Refocus

- Compact city: walking, cycling, public transport
- Near markets are our main markets (GB, ROI)
- Familiar yet young and fresh tourism product
- Emerging neighbourhood tourism
- Access to green/open spaces
- Local talent: music, food and creative arts and culture
- Innovative digitalisation: providing seamless travel

Visit Belfast Marketing, Sales & Visitor Servicing

- Champion responsible tourism
- Promote neighbourhood tourism
- Amplify the city's emerging culture and arts sector
- Focus on NI, ROI & GB and repeat visitors
- Accelerate the safe return of conference and cruise tourism
- Supporting the return of international tourism
- Embracing new technologies

Covid-19 has presented a unique opportunity to innovate and adjust, to restart and recalibrate and in doing so:

- Build a resilient tourism economy
- Stay ahead of the digital curve
- Support the low carbon transition
- Deliver value for communities
- Re-imagine future of city tourism

Priorities for Visit Belfast's business plans include:

- Expand the city's tourism offer and stimulating consumer confidence in the urban area
- Utilise the strength of the city brand and its equity to promote unique Belfast experiences
- Re-start and sustain domestic tourism while supporting the safe return of international tourism
- Support tourism businesses, protecting jobs and contributing to economic recovery
- Achieve tourism growth from high value markets in a sustainable and inclusive way
- Support the Belfast Cultural Strategy as part of the Re-Imagined plans for tourism
- Promote and stimulate stronger, fairer and more sustainable eco practices
- Engage with local communities and amplify local experiences & stories
- Utilise and invest in digital technology and communications to increase competitiveness
- Commit to longer term initiatives including signature events, 2023 International Year of Culture and UNESCO City of Music

Change Programme Focus to Building Back Better

Responsible Tourism

Measuring environmental, community and social impact KPIs

- Develop Global Destination Sustainability action plan with BCC
- VB third-party certified DMO by 2022

Love Local

- Develop new neighbourhood and cultural tourism clusters
- Roll out new partnership scheme

Health & Wellbeing

- Positioning Belfast as a safe, welcoming city
- Providing visitor and community assurance

Demand Generation

- Flexible conference support and corporate schemes
- Next generation' ambassador programme

Acceleration of Digitalisation

- Enhance path-to purchase and visitor journey, real time personalised information and automation

As illustrated above, Visit Belfast has identified five key change areas to build back better. Two key change initiatives are detailed below and the remaining three are outlined within the Operational Plans in Chapter 3.

Responsible Tourism

In a relatively short period of time, Belfast has moved from lack of preparedness for climate change to one of proactivity, partnership working and ambition. The city has made excellent progress in developing a series of measures on climate adaptation, climate mitigation and levers to support a green economy. Belfast has launched its first resilience strategy with the goal of 'transitioning Belfast to an inclusive, low carbon and climate resilient economy in a generation.'

Two important city-wide structures have been established to take this work forward; a Resilience and Sustainability Board to drive delivery of Belfast's Resilience Strategy and the Belfast Climate Commission, to act as a think-tank and advisor for the city's climate action.

Global Destinations Sustainability Movement

To support the city's journey towards resilience, Belfast City Council and Visit Belfast joined the GDS (Global Destinations Sustainability) movement in 2020, the world's leading benchmarking and performance improvement programme for tourism destinations.

Belfast also took part in the GDS Index for the first time, to develop an evidence based approach upon which to develop a sustainability action plan. Belfast's sustainability performance was assessed in five areas: environmental, societal, supplier/industry and at a destination management level.

The index benchmarked Belfast's performance against other cities, placing it 47th out of 48 of the GDS cities focussed on sustainability. This result is indicative of the limited focus on sustainability within the tourism industry and Visit Belfast to date, however, it highlights the need for urgent intervention if Belfast is to realise its ambition of building back better and developing a more responsible and inclusive city economy.

Belfast response: Building Back Better

Sustainability will no longer be an area of competitive advantage for 'responsible' destinations, it is an area of responsibility for all destinations. It is an underpinning theme and commitment required for Belfast to build back better, embedding sustainability at the heart of its tourism industry and within Visit Belfast as the city's DMO.

This is the beginning of Belfast's commitment to build back better; informing the City's vision for sustainable tourism and the future 10 year action plan for tourism in the city region. The end goal is for Belfast to become a more regenerative, flourishing and resilient place to visit, meet and thrive in.

Sustainable Belfast Plan

Sustainable Belfast is a key theme in Belfast City Council's 10 year tourism plan and Visit Belfast will work closely with the Council to deliver a joint action plan. To date, the plan has identified four main themes:

1. Belfast's Journey Towards Becoming a Sustainable Destination

- Belfast will commit to becoming a certified destination by 2025 which is the status of top tier destinations within the GDS Index.
- Establish a city-wide sustainable tourism taskforce group as part of the Belfast resilience and sustainability board to drive the city agenda
- As the city's DMO, Visit Belfast will commit to becoming a fully certified sustainable DMO in 2021-22.
- Visit Belfast will establish a sustainability team across the company, develop a training programme for Board members and staff, a sustainability action plan to drive sustainability performance improvement and start to create a culture of sustainability at the heart of Visit Belfast
- Visit Belfast will develop new KPIs including social/community and environmental goals that align with Belfast Agenda, resilience strategy and UN SDGs

2. Building a Sustainable Industry

- Visit Belfast and BCC will develop and deliver a bold and ambitious certification strategy across our tourism and hospitality industry. This will include a strategic partnership with Green Tourism and a new scheme by BCC to incentivise certification across Visit Belfast partnership in 2021-22.
- Aim to have 50% of Visit Belfast's tourism and hospitality partner businesses (225) certified by 2021-22 and 80% by 2024, subject to incentive scheme approval.
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3. Inclusive And Sustainable Growth

- Create a local sustainable network of organisations and initiatives and projects that could be promoted to Visit Belfast tourism segments – event organisers, cruise, consumers and tour operators.
- Increase the benefits of tourism for Belfast neighbourhoods, communities and residents through development of outreach and partner initiatives- led by the Visit Belfast sustainability team in partnership with BCC.
- Improve perceptions of tourism as a force for good by residents and citizens by 2025 (on 2021 baseline measure).
- 30% of all inbound business events to have a sustainability plan in place (2022) with the aim of increasing this to 50% by 2023 and 80% by 2025.
- 30% of all inbound business events to have a legacy plan in place (2022) increasing to 50% by 2023 and 80% by 2025.
- Cruise Belfast sustainability plan to be developed for 2022 by Visit Belfast and Belfast Harbour.

4. Belfast: The Most Transformed Destination

- Improve GDS ranking in 2021-22 and become the most improved destination by 2022-23
- To deliver the goal of the resilience strategy, Belfast City Council's resilience team will also be focussed on targets to reduce greenhouse gas emissions, electricity consumption, and landfill waste as well as increasing recycling levels and improving scores in the social progress index.

Acceleration of Digitalisation

The onset of Covid-19 and stay at home orders increased digital marketing consumption and adoption three fold and this is set to continue with technology now seen as a basic prerequisite for safe and seamless travel.

Digitalisation in tourism services and marketing is expected to accelerate, including a higher use of automation, contactless payments, on-line purchasing, virtual experiences, digital communications and real-time personalised information. It has transformed traditional roles, relationships and business models with the increase in digital channels, platforms and on-demand functionality, accelerating the speed of transactions, market awareness and feedback.

This digitalisation, has created a new impetus for Visit Belfast's business and leisure digital marketing and visitor servicing activity to engage with aspiring visitors that, at this time or post Covid-19, are seeking to research, decide and book all aspects of their travel on line, and to maximise their stay when they arrive in destination.

Visit Belfast's digitalisation plans aim to:

- Enhance creativity and innovation in city tourism;
- Maximise on-line opportunities for visitors to purchase;
- Expand international reach;
- Improve visitor access and customised experiences;
- Increase visitor satisfaction and service quality;
- Support industry businesses and our tourism ecosystem; and
- Instil confidence and deliver value for visitors.

This will enable greater customisation and personalisation of visitor information, inspiration and experiences through planned investment in the upgrading of technology in Visit Belfast Welcome Centre and the Cruise Welcome Hub as well as utilising on-line marketing platforms to create the seamless visitor path to purchase and engagement within the destination welcome services.

3. OPERATIONAL PLANS 2021-22

3.1 Marketing, Communications, Partnership and Commercial

Digital, Marketing & Communications Plans

Marketing Situational Overview

Visit Belfast's largest visitor markets have hitherto derived from Great Britain and Ireland, with significantly less reliance on international markets compared to other UK and Ireland destinations. While expectations are low overall for recovery in 2021, Visit Belfast forecasts a meaningful tourism restart from summer from these domestic-near source markets. These assumptions are based upon travel within the Common Travel Area (CTA) being permitted, hospitality and tourism businesses reopening and the ability for Belfast to tap into the pent up demand for overnight staycations, Visiting Friends & Relatives (VFR) and repeat visits to a known and familiar destination. Although recovery from overseas international markets is expected to be slow, they remain a vital element of the City's future tourism growth plans and something which Visit Belfast will not lose sight of. None-the-less, Visit Belfast's marketing plans have and will continue to promote Belfast as an attractive and safe 'local and international' destination, keeping the brand alive in the minds of audiences at home and abroad and positioning Belfast well in converting interest into actual visits. While 2021 recovery plans will focus on near source markets, Visit Belfast's range of promotional activity also aim to support, restore and reactivate city tourism across all key markets over the next three years.

Preparing for Recovery and Shaping Tourism for Tomorrow

The objectives of Visit Belfast's marketing plans will focus on:

- Promoting Belfast City Region in a trusted, safe and responsive way increasing social, cultural and environmental awareness;
- Utilising and adopting a place based approach to the marketing of city neighbourhoods;
- Identifying priority city break and leisure markets that can make the most impact in the short term;
- Re-positioning Belfast in a fiercely competitive and cluttered market, utilising coherency of anchor experiences and place stories;
- Rebuilding consumer and community confidence and promoting clear and trusted communications on safety measures and protocols;
- Sustainable demand-led marketing that drives inclusive growth;
- Pivoting marketing activities to cater for new market opportunities and partnerships; and
- Upscaling digital and mobile first communications and service development using personalised data.

Rebuilding Belfast's Tourism Economy: Visit Belfast's Marketing Approach

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

It is also crucial that Visit Belfast's marketing plans are ready and prepared; and based on a variety of scenarios and market conditions moving forward; with leisure and near source markets offering the most potential in the short to medium term. The agility and responsiveness of the marketing plans will be key to effectively adjusting to the changing Government and PHA guidelines, necessary for cautious re-start of tourism with the potential of stop-start cycles as part of the mix.

Visit Belfast's ability to continually engage with consumers is key to not only keeping the Belfast brand visible to visitors but also in creating the connection between them and tourism partner businesses and ensuring market readiness through appropriate and creatively articulated communications and campaign activity. Scenario plans, alongside content creation plans, are being formulated to enable agile and responsive communications in order to deliver efficient and effective outputs during these challenging times.

Visit Belfast's marketing and communications will embrace the vision of a *City Imagining* and support Belfast City Council's cultural strategy, championing, nurturing and developing content that will provide unique selling propositions and promotion of unique visitor experiences found in Belfast and which need amplified in ways that will set us apart from other destinations and distinguish our marketing.

The visioning narrative and themes in *A City Imagining* provide a broad consensus on a long-range vision for interpretation and visitor experience in Belfast – these will be reflected, challenged and reinvigorated in Belfast's positioning, marketing and communications:

Tell me more (A city of stories)

Most cities claim their people are the best, however we truly believe that it's our incredible people who give character and charm to Belfast. A city where people love to talk, to tell and share stories, to banter and make the visitor feel like they belong – that's Belfast. Conversations are nourished as much by wonderful food as they are flavoured by local voices. You might have heard one story about Belfast but you certainly haven't heard them all.

Not what it seems (A city of contrasts)

Belfast has an intriguing and complex history stretching back thousands of years. Contrasts and endurance are etched into the character of the place. This is evident topographically from the high ground of the hills to the depths of the waterways; creatively from the spontaneous expression of street art to the considered curation of our museums and socially through the compelling stories of our recent past. Intrigue and curiosity are part of the fabric of our place.

Hidden depths (A maritime city)

It has been said that the people of Belfast walk on water. Beneath the streets, the Farset and Blackstaff rivers determined the shape of the city that grew up around them. Waterways, rivers, lagoons and shores have shaped the culture and character of Belfast since ancient times; they have provided inspiration for our poets and opportunity for the city's industrialists and visionaries. The city's dockland now hosts the iconic Titanic Belfast which pays homage to the Olympic-class liners built in Harland and Wolff by the White Star Line. This is one chapter in a settlement story of tidal currents and crossings.

Homespun (Made in Belfast)

Creativity combined with hard work and ambition can be traced through the city's industrial heritage and beyond, from rope-making to ship building, whiskey distilling to the artisanal expertise of the mill workers in the linen mills. Belfast also abounds with unique cultural venues and experiences which are testimony to a city steeped in creativity and innovation. From quirky cinemas to established theatres, from incredible visual arts to a music scene that will leave the city ringing in your ears, Belfast has the edge.

Marketing Communication Touchpoints and Themes 2020-21

The following themes and consumer touch points will provide key messaging and help shape planned marketing and communications activity for the three year period of this plan:

Outdoors, Green Spaces and Nature

Trends in consumer confidence suggest that access to outdoor and green spaces will be increasingly important in a post-Covid environment. Visit Belfast will therefore integrate messaging promoting the Belfast city region as a safe and green destination, highlighting the ease of access to, and green assets across, the Belfast City Region.

Reimagine Belfast: Culture, Art and Music

Belfast has a rich history and a vibrant contemporary culture. Communications messaging will reflect this through promotion of the city's arts, music, literary and theatre scenes, as well as promoting historical visitor attractions and tours. This will include early messaging about the new Belfast Destination Hub, as plans are developed this year.

Visit Belfast will incorporate the language and themes from Belfast City Council's new Cultural Strategy "A City Imagining" into our cultural messaging.

Health and Wellness – luxury and spa experiences

Higher-spending visitors will be important to recovery, particularly if there is any threat to the potential volume of visitors from reduced air/sea capacity. Messaging will support high-end product such as five-star hotels, Michelin dining and spa experiences and retreat packages in the city region.

Iconic Waterfront: Maritime and History

The Titanic story and Belfast's maritime history continues to draw visitors to the city. With a growing portfolio of products within this area, Visit Belfast will work with Maritime Belfast, Titanic Belfast, the Maritime Belfast Trust and Belfast Harbour as well as extending out to our RTP partners to promote this key theme.

Homespun - People and Stories

In line with Belfast City Council's Cultural Strategy, Visit Belfast's marketing communications messaging will reflect the unique character of Belfast's people, culture, arts and history, showcasing authentic experiences to stimulate interest in the destination.

Food and Drink

Following the success of events and initiatives including Taste the Island, the Twilight and Christmas Markets at St. George's and Belfast Restaurant Week, Visit Belfast will continue to support the hospitality sector's recovery through promotion of Belfast's vibrant food and drink experiences and food and drink scene.

Events, Festivals & Sport

Events, festivals and sport have always been an important generator of tourism demand. The City's virtual calendar of events will continue to be promoted by Visit Belfast in advance of live events and festivals restarting.

Belfast City Region Experiences

Visit Belfast will work with regional tourism partners to augment the city break experience by highlighting the array of attractions and experiences available within the Belfast City Region. This messaging will provide stand-out within the city break market.

LGBTQI+

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

Belfast Brand / Embrace a Giant Spirit

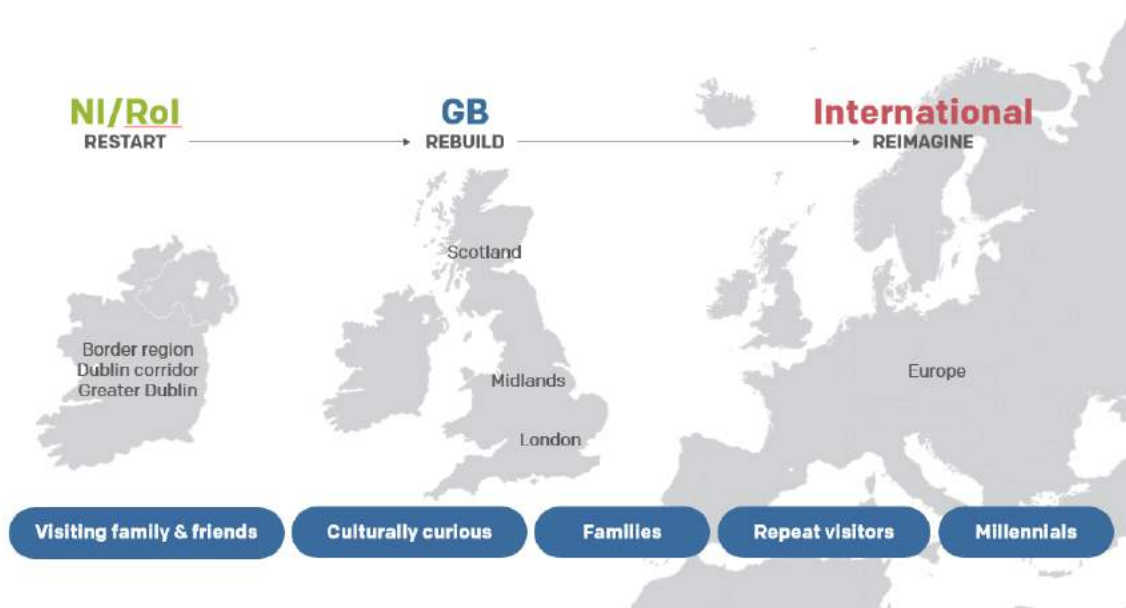
City branding enables cities to be competitive and own a positioning and narrative that expresses what makes the city unique and special.

Pre-Covid, there was a real sense of confidence, attitude, ambition, infectious enthusiasm and above all energy in Belfast that was driving the city forward. As Belfast communicates on so many levels and in so many ways, the city brand provides a mechanism for communicating Belfast via one visual identity and tone of voice. Belfast is natural, bright, original and assured.

The Belfast ‘Starburst’ is the city’s visual identity for projecting the positive, distinguishing associations and symbolises the city’s renewed energy. ‘Starburst’ is a shape that takes its inspiration from a satellite view of Belfast, complete with arms radiating into North, South, East and West neighbourhoods. The starburst has a dramatic indent that symbolises the point where Belfast Lough flows in to meet the historical heart of the city. The city brand enables Belfast to compete on a global stage for visitors, investment, students and talent and locally for its citizens. Since its launch Visit Belfast has been actively incorporating the new city brand in its destination marketing campaigns and communications informed by the brand tourism narrative which has been developed out of the agreed cultural strategy. While Covid-19 has impacted on the approach to city marketing, the attributes and core values of the brand have remained strong and even more relevant – *our heart is big and our spirit is strong*. Visit Belfast will continue to support Belfast City Council as ambassadors for the tourism strand of the Belfast brand, rolling out a newly updated tourism-specific brand book for industry partners with guidance on utilising the brand identity, tone of voice and key values and attributes of the Belfast brand.

Tourism NI has developed an experience brand to promote Northern Ireland on the island of Ireland and by Tourism Ireland internationally. *Embrace a Giant Spirit* (EAGS) is designed to communicate unique and high quality experiences to visitors that are distinctly Northern Irish, comprising two concepts – firstly, a land built by a Giant Spirit reflecting consumer research and feedback that says Northern Ireland is warm, engaging and big-hearted; a land built by pioneers and entrepreneurs with a rich cultural history, reflected through words, music and craft and woven together by a unique elemental beauty. The second concept invites visitors to awaken their spirits based on insights on visitors that have shown an interest in Northern Ireland, namely, embracing culture and heritage, connecting, discovering and refreshing. A collection of Belfast experiences have already been included in itineraries as part of this new experience brand. Visit Belfast and Belfast City Council and Tourism NI are committed to working together to align and integrate the EAGS proposition into Belfast’s own, unique, city place brand.

Key Markets and Segments



Targeting those segments from local, domestic (NI), (GB) and (ROI) markets most likely to visit for day/overnight as and when restrictions are lifted, will be vital to maximising marketing efforts and investment. The domestic market as well as the ROI (depending on easing of current restrictions) will be a critical part of early recovery plans for Belfast and Northern Ireland tourism. Market and segment selection will be in line with Government and PHA guidance for NI and ROI and will inform campaign content and scheduling.

As set out in Tourism NI's March 2020, Domestic Tourism Strategy, Visit Belfast will align its proposed campaign activity to target the following priority segments: Aspiring Families, Social Instagrammers and Short Break Enthusiasts.

Tourism NI's Toolkit for the ROI Market is currently being refreshed and Visit Belfast will take on-board all adjustments required once this information becomes available. Based on existing ROI identified priority segments, Visit Belfast campaign plans will focus on *Open-to-Ideas* and *Open-Minded Explorers*.

Additionally our campaign will connect with VFR and repeat visitors with familiarity with the destination. Promoting authentic and real experiences and 'instagrammable' experiences will be a key element in our creative approach

Covid-19 has changed people's behaviour, preferences, travel choices and motivations with more traditional approaches and segments re-emerging. Alongside positioning, segmentation Visit Belfast's marketing will prioritise and target the following market types and identified segments:

- Staycations, day trips and repeat visitors
- Visiting Friends and Relatives
- Families & couples
- Culturally Curious younger demographic
- Millennials seeking authentic and real experiences
- Local and GB visitors who typically travel further afield

Scenario Planning: A Phased Approach to Marketing and Communications

Adopting a scenario and phased marketing approach, Visit Belfast's digital marketing & campaign plans will encompass smart, simple and tactical activity sensitive to the evolving recovery situation and aligned to supporting a shared vision for tourism. **Restart, Rebuild, Reimagine** are the three key stages of recovery and these will inform and align marketing activity with current thinking and approaches by national tourism organisations; and ensure that Visit Belfast's plans continue to adapt and adjust as the Covid-19 situation requires:

Scenario 1 FULL LOCKDOWN	Scenario 2 LOCKDOWN RESTRICTIONS PARTIALLY LIFTED	Scenario 3 LOCKDOWN RESTRICTIONS SIGNIFICANTLY EASED NI regional travel to Belfast allowed	Scenario 4 UK AND TRAVEL FROM CCE ALLOWED (but international borders closed)	Scenario 5 UNRESTRICTED TRAVEL WITH SAFETY PROTOCOLS AND MEASURES
Dream Now & Travel Later / Stay at Home & Stay Safe Inspirational/PHA messaging, at home activities, content, puzzles, jigsaws and competitions, keeping brand alive and destination awareness				
	Shop local, Support Local, Welcome Back Belfast / We're Ready, Are You? Reactive and selective marketing & comms supporting reopened businesses safely, agile digital only marketing and day trip focus supporting PHA guidance. Welcome back messages, offers/updates			
		Home-Aways in Belfast / Our City's Your City / Belfast in Blooming High intensity, close to normal marketing, bolster campaign activity and seasonal destination marketing driving demand - day & overnight trips. Upbeat messaging, reassuring/inspirational, confidence building: providing reasons to visit Belfast		
			Uniquely Belfast, Only in Belfast / Belfast is Home / Wish you Were Here New video and content. Intensified & heavyweight Destination Belfast creative integrated tactical campaign approach to drive bookings: GB focus and IOI for staycations/repeat visits. Partnering industry, TI & TNI to integrate/maximise results	
				Building Back Better: <i>Our City, Your Planet / Greening Belfast/ Better in Belfast</i> Position Belfast as a Future City. Rebuilding Belfast profile as a leisure/business destination, promotion that stimulates demand, achieves growth & builds back business

Digital Approach

Digital activity has been an increasingly important aspect of Visit Belfast's overall marketing and communications and visitor engagement activity in recent years. In response to restrictions, lockdowns and industry partner requirements together with increased consumer demand, the digital team has stepped up to provide constantly updated, reliable, trusted information and engaging content across all customer facing web and social channels. A variety of new tools have been developed to entertain, educate and inspire 'at-home' audiences and office workers to 'dream now travel later' in order to keep Belfast experiences alive in the mind as well as keeping followers up to date with the latest travel advice, city openings or closures, PHA and safety messaging and sharing stories and wish lists for future visits. This included website content, blog articles, social media, email marketing and paid digital advertising - the level of productivity and consumer engagement is expected to increase further with the return and restart of travel creating further digital demand and opportunities to engage and convert to visits.

Young and less risk-adverse travellers are likely to jumpstart the tourism sector in its early recovery stages, therefore successful digital engagement with this segment requires new and different ways to capture their attention and imagination. Experimenting with new channel features such as TikTok challenges, Instagram Reels, Twitter Fleets, and Instagram Guides will have a multiplier effect from positive social reports that influence demand among other new-adopter segments, as well as getting the destination trending.

Visit Belfast will implement a varied and dynamic digital marketing and content approach that adapts to changing restrictions, different segments and consumer sentiment, to ensure appropriateness of digital activity and selection of channels that our audiences are using. Key aspects will include:

At Home Travel Experiences: deploy campaigns quickly and creatively, aligned content marketing and integration of digital communications into all aspects of their stay at home lives, including e-commerce, entertainment, travel bucket lists and itineraries that inspire future visits.

Engage Customers with Empathy: re-assure followers and potential visitors, provide trusted information on protocols and inspire confidence in the destination and its people. Utilise real-time data to validate and better understand their current situation and needs.

Personalise Digital Communications: accelerate digital channel adoptions, deliver the right message, to the right person, at the right time. Experience tourism is on the rise so off the beaten track and lesser known suggestions will gain more traction. Amplify real stories from neighbourhood communities.

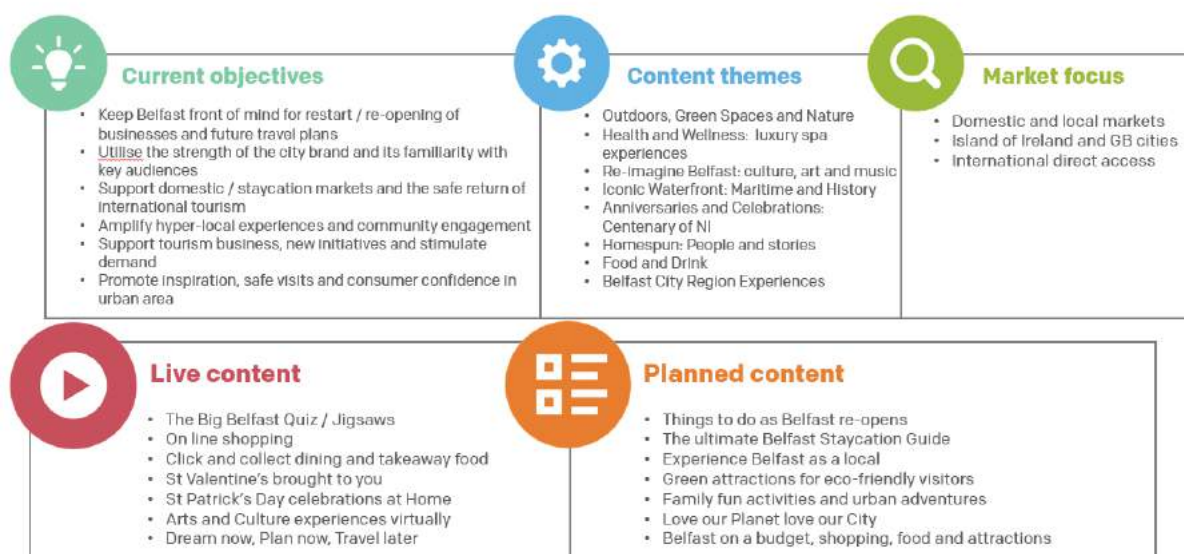
Optimise Budget Spend: unified digital marketing and channel advertising to geo-targeted consumers, aligned with campaign marketing and content plans.

Content Planning

In order to respond to the needs of local communities and visitors, the content created and promoted through Visit Belfast digital channels will instil confidence in the urban destination, promote local business and motivate visits to the city and its neighbourhoods. Key to this will be communicating engaging experiences and attractions through the heritage, culture and the stories of Belfast. Championing Belfast City Council's Cultural Strategy Themes: Tell me more (a City of stories), Not what it seems (a City of contrasts), Hidden depths (a Maritime city) and Homespun (Made in Belfast), Visit Belfast will deliver carefully curated content to facilitate every stage of the visitor's journey from wanderlust > purchase > itinerary.

Visit Belfast's content plans illustrated below, will constantly evolve in line with city positioning, sentiment research, key themes and with experiences and products that will effectively engage with today's and tomorrow's 'travel later' visitors across different stages of their pathway to purchase. This will ensure Belfast is well positioned to benefit from the pent-up-demand with audiences primed and ready to book.

Digital Content Plan



Web and Digital Development

Search Engine Optimisation

Search Engine Optimisation continues to be at the forefront of digital technology. It is important that Visit Belfast continues to maintain its position as the top ranking website for visitor information on Belfast, particularly as 71% of traffic comes to VisitBelfast.com through search engines with only 10% coming direct. Visit Belfast also continues to develop its strong SEO offering to ensure it appears top of organic searches including working on Google my Business, Google Maps, Google Events and Google imagery to ensure that not only are we 'feeding' Google to ensure the website is kept at a high level in rankings but also to ensure that when searched for, the City of Belfast has relevant, reliable and quality content at the forefront.

Responsive Technology

In 2020 analysis indicates that 70% of visitors to VisitBelfast.com utilised a mobile device, with tablet devices contributing 5% and desktop contributing 25%. Visit Belfast will continue to provide strong, visual content to ensure the best possible user-experience whilst on the website, whether on mobile or desktop but ensure usability in the build and design of the website works for multiple devices. Improved digital infrastructure and speed with the introduction of 5G will allow users to handle bigger and better websites allowing for more interactive and image heavy content.

Innovative Design & Immersive Technology

With 65% of consumers now using Quick Response (QR) codes on a daily basis for payment, signage or PDF downloads (Beaconstac 2021), Visit Belfast will utilise new immersive technology to develop innovative ways to interact with visitors. Initial projects include interactive maps and augmented/virtual reality, with use of QR codes. Visit Belfast aims to provide a personalised and informative experience to key audiences as well as of developing a seamless automated visitor journey, minimising touchpoints in a post Covid-19 environment. Development and usage of AR

technology will further enable visitors to have unique and immersive experiences and tours utilising their own devices.

Videography & Photography

In order to deliver the best user-led content experience, Visit Belfast will further develop and enhance its shared asset library with new video and photographic content that addresses a post-pandemic Belfast. The content curation will highlight and illustrate unique and home grown products alongside anchor products that can promote and position Belfast as a vibrant, cultural tourism destination to our virtual audiences. This will highlight Belfast, not only as a safe and resilient city, but also enable visitors to immerse themselves in our culture, environment and community. Visit Belfast will continue to work with Belfast City Council, Tourism NI, Tourism Ireland and partners to acquire and augment the City's content assets.

New Digital Projects

Visit Belfast will continue to develop new and innovative ways to engage and inspire customers across digital channels, before, during and after their visit. New initiatives include:

- **Digital Map:** working with Tourism NI to integrate the new NI digital map in the Visit Belfast Welcome Centre utilising existing feed via the Visit Belfast website. Development of a partner based map on VisitBelfast.com segmented into categories for Eat & Drink, Retail, Sport, Outdoors etc. visitors will be able to create personalised itineraries.
- **QR codes:** these will be utilised to increase contactless touchpoints that assist visitors in the Visit Belfast Welcome Centre seeking information on all that Belfast has to offer, QR signage will direct users to selected areas on the VisitBelfast.com mobile friendly pages to provide more information on places to visit, things to see and cultural experiences to explore.
- **Augmented Reality (AR):** utilisation of AR to enable visitors to sample Belfast through their own devices, with a primary focus on immersive culture art and heritage, as well inspiring new and repeat visits. Off-the-beaten track, community and hidden gems, and personalised suggestions on where to visit next can all be tailored into this type of digitally assisted experience.
- **Interactive web initiative:** working with Belfast City Council, Visit Belfast will develop 'People Make Belfast' experiences that enable visitors to engage with Belfast's cultural providers, and really 'get' behind the scenes and understand 'what we're all about'.
- **Experience Belfast App:** development of a new *Experience Belfast* travel app that will provide hyper-local information and recommendations no matter where visitors are traveling in the City Region:
 - Enabling creation of a profile that allows bookmarking of places and attractions
 - Intelligent search filters results based on the locations and attractions visitors really want to see
 - Off the beaten track, what the locals know and recommend, offers and personalised suggestions, together with language selector, walk or ride maps
 - This app will link to social media to enable preferences to be compiled to create an assisted list pre visit and provide live location suggestion in destination.

Visit Belfast Campaign Approach

The aim of Visit Belfast's digital & marketing campaign activity is to actively contribute to the recovery of city tourism, and to build back better. Visit Belfast is committed to continuing to work with Tourism Ireland to keep the city destination front of mind and inspire future visits, so when travel re-opens the city is well positioned.

In support of recovery ambitions across all our markets Visit Belfast will deliver marketing activity that supports city/industry recovery, sensitive to fragile and evolving recovery and at all times aligned with Government and PHA guidance utilising identified scenario and phased approaches for content and campaigns as illustrated below:

Scenario Approach to City Marketing

	SURVIVAL	RETURN (partial)	RETURN	RESTORE (partial)	REIMAGINE
LOCKDOWN	Full Lockdown	Lockdown restrictions partially lifted	Lockdown restrictions significantly eased NI regional travel to Belfast allowed (not from GB or international)	UK and travel from CCE allowed, but international borders closed	Unrestricted travel with safety protocols and measures
LEVEL	UK: VERY HIGH		UK: HIGH	UK: MEDIUM	UK: LOW
GUIDANCE	<ul style="list-style-type: none"> • All hospitality closed • Non-essential retail closed • Essential travel only • Stay at home message • No meeting indoors • No household mixing • Severe restrictions and penalties 	<ul style="list-style-type: none"> • Non-essential retail and cafes / takeaways open • Local travel allowed but restricted • No non-essential public transport • Work from home 	<ul style="list-style-type: none"> • Non-essential retail and cafes / takeaways open • Close contact services open • Restaurants - restricted operations • Food serving bars • Hotels and guest houses open • Attractions partially open 	<ul style="list-style-type: none"> • Some indoor events allowed • Mixed household groups with limits • Travel restrictions lifted for UK and Ireland • Non-essential retail and cafes / takeaways open • Close contact services open • Restaurants - restricted operations • Food serving bars • Hotels and guest houses open • Attractions open 	<ul style="list-style-type: none"> • Belfast fully open and no travel permitted from UK and Internationally • Safety Restrictions eased but still required • Testing & vaccination advice / requirements
MESSAGE	<i>Dream Now and Travel Later, stay at home and stay safe</i>	<i>Shop Local, Support Local, Welcome Back Belfast, We're Ready - Are You?</i>	<i>Home-Aways in Belfast, Our City's Your City, Belfast is Blooming</i>	<i>Uniquely Belfast, Only in Belfast, Belfast is Home</i>	<i>Building Back Better: Our City, Your Planet, Greening Belfast, Better in Belfast</i>
ACTIVITY	<p>Digital focused communications to visitors and industry</p> <ul style="list-style-type: none"> • Inspirational content – blogs, video, at home activities, puzzles, jigsaws and competitions • Innovative online and virtual products and services • Proactive communications and engagement with industry partners 	<p>Reactive and selective marketing and comms supporting reopening businesses safely</p> <ul style="list-style-type: none"> • Welcome back messages • Offers and updates on business openings, transport and safety protocols • Shop local - go local messaging 	<p>Integrated media selection with traditional and paid social</p> <ul style="list-style-type: none"> • Bolster campaign activity, seasonally appropriate proactive destination marketing driving demand - day and overnight trips. • Upweighted Digital and PR / Comms - upbeat messaging, reassuring and inspirational, confidence building and providing reasons to visit Belfast, uniquely Belfast, only in Belfast 	<p>Agile and adaptable activity responding to market changes</p> <ul style="list-style-type: none"> • Intensified and heavyweight Destination Belfast creative integrated tactical campaign approach to drive bookings - GB focus and ROI for staycations and repeat visits • Close partnership with industry, TI and TNI to integrate and maximise results for Belfast 	<p>Close to 'old normal' marketing activity in markets with highest propensity/ability to visit</p> <ul style="list-style-type: none"> • Deliver all channel segmented marketing that stimulates demand, achieves growth and that builds back business visits and events • Travel Now content promoting Belfast for 2021/22 travel including tactical/welcoming messaging • Proactive comms with visitors, industry partners and media relations
CHANNELS	<ul style="list-style-type: none"> • Website • Email • Digital paid • All social media channels 	<ul style="list-style-type: none"> • Website • Email • Digital paid • All social media channels 	<ul style="list-style-type: none"> • Website & Email • Digital paid • All social media channels • Radio 	<ul style="list-style-type: none"> • Website & Email • Digital paid • All social media channels • Radio 	<ul style="list-style-type: none"> • Social media • Digital video • OOH • Radio • TV

			<ul style="list-style-type: none"> • OOH • Advertorials 	<ul style="list-style-type: none"> • OOH • Digital Video/VOD 	<ul style="list-style-type: none"> • Targeted programmatic digital display
AUDIENCE	<ul style="list-style-type: none"> • Local & regional markets - keeping city brand alive • ROI, GB, European - destination awareness building 	<ul style="list-style-type: none"> • Local & regional targeting – daytrip focus • ROI, GB, European - destination awareness building 	All NI, wide range of audiences on basis of successful vaccination programme	Island of Ireland and GB regions	<ul style="list-style-type: none"> • Island of Ireland and GB markets • Greater focus on inbound carrier activity from GB extending gradually to Europe

Visit Belfast will initially prioritise daytrips and overnights from local and regional markets, expanding to include ROI and GB as soon as appropriate. A series of campaigns will be developed as set out below:

- Integrated, co-ordinated marketing activity designed to build confidence for residents and visitors locally, regionally and nationally as appropriate. Smart, simple and tactical activity. Hyper local – buy, shop & experience local, daytrips & staycations.
- Development and roll out Belfast Booster campaigns, aligned to Tourism NI and voucher schemes and other promotions to ensure Belfast maximises benefits and opportunities to encourage visitors back to the city, support the city's tourism and hospitality businesses working with RTP councils and partners across the wider city region
- Seasonal and scenario based activity focused on leisure visitors in the domestic, ROI and GB markets in line with restart and sector re-openings, ensuring that messaging positions the diversity and uniqueness of offer across the city region
- Enhanced digital channel activity utilising new tourism experiences to provide inspiration and motivate future visits from key direct access European Cities.

Public Relations and Communications

Public Relations (PR) and Corporate Communications have a central role in Visit Belfast's overall sales and marketing plans, commercial activity and visitor servicing promotion. During the three years of this plan, PR & Communications activity will be an important in reintroducing and re-establishing Belfast as a top leisure, conference and cruise destination to national and international media, increasing destination profile and visitor confidence, as well as enhancing Visit Belfast's corporate reputation and visibility through local media.

Destination PR

Visit Belfast will activate targeted PR activity that will support the recovery of tourism by rebuilding Belfast's reputation as a top city break destination, primarily focusing on the Island of Ireland, Great Britain, and when timing allows, direct access cities in Europe.

Utilising appropriate messaging and key themes, and working with Visit Belfast partners, Tourism NI and Tourism Ireland, media activity will develop and deliver a calendar of integrated PR support activity that is sensitive and understands new travel requirements and motivations of potential visitors.

Targeting both traditional media outlets and social media influencers, which will provide a balanced mixture of credible coverage and important peer-endorsements, Visit Belfast will rebuild and

reactivate media engagement to promote Belfast as a safe, welcoming and green and sustainable city-break destination.

Corporate Communications

Visit Belfast's communications team will develop and implement activity designed to increase profile, reputation and image of Belfast's brand image in its main markets of GB and ROI. This will include providing creative and integrated PR and communications to add value to above-the-line campaigns and other marketing promotions, supporting sales activity, including out-of-state media briefings and support strategic partner communication requirements.

Additionally, local media activity will enhance the reputation of Belfast, Visit Belfast and the tourism industry, through regular communication of key results, developments and milestones. This activity will reinforce messaging that tourism can be a force for good, and is central to building a resilient economy, delivering inclusive growth and protecting the environment. Visit Belfast will be positioned a key advocate of Belfast City Council's Resilience Strategy, and a key contributor to Belfast and Northern Ireland's economic recovery post-Covid.

Sentiment Measurement

Sentiment measurement is increasing in popularity as more traditional methods of evaluation such as advertising equivalents become harder to track, especially in the realm of social media and blogging.

Measures include the volume of conversations, as well as the overall sentiment and emotion associated with mentions of the destination across thousands of online sources from media outlets to social media.

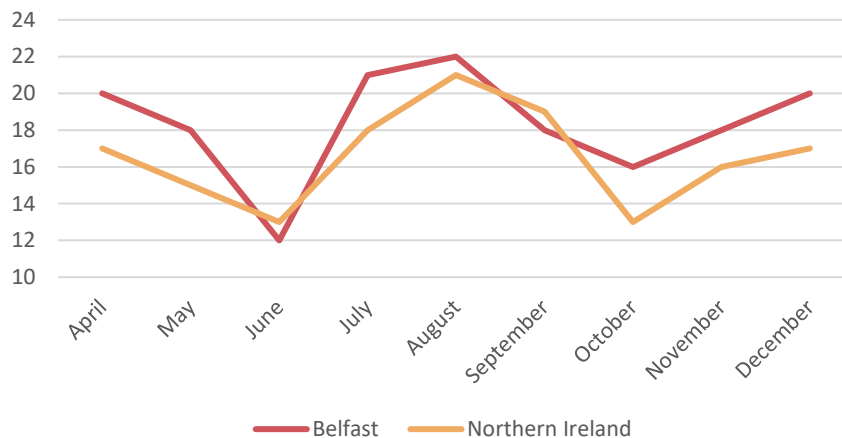
Tourism Sentiment Index

In 2020, Visit Belfast began tracking sentiment using the Tourism Sentiment Index (TSI) provided by Destination Think, tracking online conversations about Belfast in order to identify what is driving positive (and negative) sentiment around the destination. This allows Visit Belfast to benchmark the city against competitors and comparable destinations. This is in addition to current KPIs measuring weighted opportunities-to-see and advertising equivalent values.

This new KPI will help inform marketing and communications activity and content as we are able to identify key drivers, positive touchpoints, and crucially, see what content drives people to engage with Belfast as a destination.

The platform gives an overall sentiment score for the destination by subtracting the percentage of negative conversations from the positive ones, allowing Visit Belfast to track and measure the destination's online reputation over time. From April to December 2020, Belfast's sentiment score tracked above Northern Ireland for the most part, showing the importance of the city to driving positive perception of the whole region.

Sentiment Analysis Score



Routine and regular collation of TSI data will help inform Visit Belfast's ongoing and seasonal messaging as we can react to topics generating the most positive conversations, and to know what our audiences are looking for and what stimulates positive engagement with the destination. For example, from October to December 2020, positive conversation around biking and cycling grew by 13% compared to the previous quarter, suggesting that with an extended lockdown on the horizon, audiences were looking for outdoor activities. Visit Belfast can respond to this with, for example, blog content promoting the best places for cycling and walking in the Belfast City Region.

Additionally, as the city moves from lockdown into the early stages of recovery, it will be useful to analyse topics generating the most negative sentiment in order to address in Visit Belfast's marketing communications activity where possible, or to know where to best focus attention for the best engagement and return on marketing investment.

Visit Belfast Partnership

Partnership is vital to the success of Visit Belfast, our competitive pitch and our destination sales and marketing success. Understanding the catastrophic impact of the emerging health crisis and national lockdowns, Visit Belfast waived partner fees for one year until April 2021 to support to the city's struggling tourism businesses. Partner businesses continued to receive continuous updates, advice and provision of digital marketing and promotional support as the sector navigated its way through the restrictions and unprecedented start/stop operating environment.

New Partnership Scheme

Visit Belfast has undertaken a full review of its Partnership scheme and will introduce a revised scheme from April 2021.

The scheme will introduce an updated range of benefits, to include a focus on sustainability/green tourism, new digital opportunities and upskilling workshops together with two additional partnership tiers:

- **Small Business** or basic entry tier will be introduced offering a new affordable level for start-ups, sole-operator businesses as well as the guest house sector. Visit Belfast is committed to supporting large and small businesses and facilitating city wide inclusive growth across all sectors and areas.
- **Business Star** will allow for growth in supplier partners to facilitate the increased need for technology and hybrid event packages. The revised scheme will ensure each business is adequately represented across Visit Belfast's wide range of marketing platforms and digital sites.

Over the next three years, Visit Belfast will continue to develop and create, strong working relationships with tourism and hospitality businesses across the city and region to effectively market Belfast, during and after recovery. The Commercial and Partnership team will continue to offer a high level of customer service, providing a range of online events tailored to partner needs and Visit Belfast's overarching business plan; regular industry events, including Visit Belfast's AGM, partner workshops and networking events; regular partner communications; and the introduction of a biannual partner survey to further encourage partner engagement while helping to solidify and shape partnership plans throughout after recovery. Visit Belfast will work closely with all partners in order to best represent their needs and to provide a range of marketing and commercial opportunities that will support their recovery plans, as well as those of Visit Belfast.

In 2021-22 Visit Belfast have taken the decision not to increase fees further, and this will be reflected in the new scheme. Prices and benefits will be reviewed annually, and in line with the commercial strategy, a 20% levy increase will be added to the upper business and leisure tiers from 2022-23 to contribute to seasonal destination marketing campaigns.

Corporate and Strategic Partnerships

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

Regional Tourism Partnerships

Visit Belfast's Regional Tourism Partners (RTPs) and wider partnership forums have successfully developed collaborative platforms for the city region area. The 'Belfast Plus' experience highlights experiential tourism products from Lisburn and Castlereagh City Council (LCCC) and Ards and North Down Borough Council (ANDBC). Newly branded and positioned Belfast City & Region digital communications, integrated content on VisitBelfast.com, social media channels and content across blogs, e-zines and literature have been key platforms for the promotional activity supported by the wider marketing, business development and visitor servicing teams. In 2021-22 Visit Belfast will continue to build on the new city region marketing approach and tourism recovery plans and together will develop robust and focussed marketing activity in order to maximise the potential of the city region product development and support Belfast Region City Deal tourism projects.

Community Tourism Partnerships

Neighbourhood tourism is an increasingly important aspect of the city's growth agenda: authentic experiences, telling our stories, hidden gems and political tourism are all key strands of Belfast's rich cultural heritage and growing product offering. Visit Belfast is committed to continuing to build its partnerships with Fáilte Feirste Thiar, EastSide Partnership and the neighbourhood businesses within these communities - partnerships will also be sought with development agencies and cluster groups in North and South Belfast. Visit Belfast will develop and create marketing opportunities and experiences aligned with Belfast's shared ambition for tourism and to ensure wider ownership and benefits of leisure, business and cruise tourism beyond the city centre. Visit Belfast will utilise its marketing and sales channels to promote cultural 'city hood' vibrancy, urban diversity and real local products and experiences, along with promoting the connecting green spaces and public transport routes across Greater Belfast.

Cultural Tourism Partnerships

Working with Belfast City Council, cluster partnerships for the Culture and Arts sector will be developed by Visit Belfast. Its focus will be on promoting local product makers, performers and artists across the full range of marketing channels and its aim is to encourage engagement, investment and consumption of our indigenous arts and culture.

Partnership Events Programme

In building back better, Visit Belfast will organise and deliver a series of informative industry events supporting the theme that *Tourism is a Force for Good*. – these will include key strategic areas of Protecting the Environment, Delivering Inclusive Growth and Building a Resilient Economy.

Commercial Sales

Commercial Opportunities

Visit Belfast will continue to identify and implement new commercial opportunities and marketing platforms to ensure strengthened promotion and best fit for industry partners in a challenged operating environment. The focus will be on the growth area of digital platforms, along with opportunities from the investment in new technology within Visit Belfast Welcome Centre and Cruise Welcome Hub.

Visit Belfast's digital screens have been a significant contributor to commercial income and the new investment will provide improved screen opportunities with enhanced advertising layout, ease of visitor access and usability. The upgraded islands will enable partners to showcase content on a looped basis, creating an immersive and engaging space for visitors arriving to Belfast, reducing touch points and providing partners with innovative digital platforms.

The new upgrade will allow for various levels of investment ensuring the platforms are open to all sectors and sizes of business and will continue to ensure the Visit Belfast Welcome Centre represents a cross section of businesses from the city and region.

Digital platforms will be the main focus for commercial sales as tourism begins to recover. In 2020, 72% of total advertising spend was digital (Intelligence Insider: Emarketer). Visit Belfast will create new commercial opportunities on both VisitBelfast.com and MeetBelfast.com as well as offering shared e-zine positions and commercialising social media posts and blogs.

Visit Belfast is developing seasonal and sector-led promotional bundles, offering bespoke packages for businesses that provide strong coverage for their products or services. As the sector begins to rebuild, Visit Belfast will offer 'recovery bundles' at a discounted price to partner businesses.

3.2 Business Development

Business Tourism

COVID-19 Context

Events were one of the first sectors to be affected by the pandemic, with live business events and associated revenues being lost and venues forced to close. Meetings of up to 30 people in Covid-secure venues were allowed for a limited period last year before the sector was closed again due to further restrictions.

Belfast Response

Despite these challenges, there has been a tremendous amount of work undertaken by industry partners and Visit Belfast to reschedule, retain and secure future bookings during this period. Belfast venues and hotels have been incredibly flexible and accommodating with ongoing changes to contracts and dates. In addition, Belfast City Council and Tourism NI have amended the terms of the conference support scheme to help retain and support conferences impacted by Covid-19 taking place in 2021, 2022 and 2023.

To date, 110 future conferences have been successfully retained for Belfast for 2021 onwards worth a potential £91.7m economic impact to the city in future years as set out below.

Visit Belfast forward conference bookings (at 5 Feb 2021)

Year	Conferences	Delegates	Bed nights	Economic Impact
2021	35	10,945	40,430	£16,720,561
2022	47	28,100	103,575	£40,645,857
2023	19	16,385	53,270	£23,195,590
2024	4	3,583	11,149	£5,451,192
2025	2	1,100	3,300	£1,613,502
2026	1	1,100	3,300	£1,613,502
2028	1	1,300	5,200	£2,542,488
Total	110	62,513	220,224	£91,782,692

Future Outlook: Confidence in Business Tourism Recovery

Visit Belfast's strongest performing market segments are National (GB/Ireland) Association conferences, representing over 65% of all bookings. Research during the pandemic has consistently shown that Associations are more likely to postpone their event than cancel, and that they are also less likely to move to 100% virtual than corporate events. Visit Belfast's best market performing market segment is also the most resilient post Covid-19.

Furthermore, the flexibility and support that venues, hotels and the destination has provided during the pandemic will be critical to winning business in the future. Over 71% of Visit Belfast clients have potential to bring repeat business to the city.

During the pandemic (2020-21), Visit Belfast, together with its industry partners have secured more new future conference bookings for the city than have been lost (£14.4m vs £10.4m) indicating the resilience of business tourism - supported by its longer lead-times.

Visit Belfast currently has a pipeline of 494 conference leads worth a potential £538m economic impact for future years which provides a strong foundation for longer term recovery. The team has also pivoted all of its sales and marketing activity to virtual and developed a five-point plan to keep in touch with prospective clients and ambassadors during this challenging time. Continuing to build relationships, ensuring Belfast remains front of mind with clients and keeping abreast of rapidly changing industry and market developments is critical to informing the city's collective recovery plans.

Business Events Re-start

There is currently no re-opening date for business events in NI, ROI, Scotland, England or Wales which given the long lead-in times for business events; is critical to kick-start planning and recovery.

A lead-in time and tentative reopening date will enable the sector to gradually rebuild, engage with the market, and confirm scheduled business and progress conferences with long lead in times. There is recognition that given the public health implications, the sector will be required to be flexible in its approach and this is also understood by clients.

Visit Belfast is a member of the Business Tourism working group, chaired by NITA, which is finalising a plan for the safe, sustainable and phased reopening of the business events sector along with detailed Covid-19 working guidelines for the business events sector.

Proposals have been submitted for consideration by the Department for the Economy and the NI Executive as part of the Roadmap to Recovery.

There are five interventions required to enable business events to re-start:

- Financial support for the industry (venues and supply chain)
- A phased re-opening plan
- Event and venue Covid-related management and Guidance tailored for business events
- Rapid testing and roll out of the vaccination programme
- Building market confidence in business events

The phased re-opening assumes a five-step phased approach over a 10 month period, with a number of restart events identified which include a mix of domestic and out-of-state events during 2021.

Assumptions

The working group have made the following assumptions with regard to the phased reopening plan which have been used to inform Visit Belfast's business and operational plans:

- A five-step phased approach over a 10-month timeframe is required in 2021, with a number of potential restart events identified
- Event and event safety plans in line with detailed guidelines will be developed for these events in advance and will be available for Public Health or local authority sign off

- All events with over 50 delegates will have to produce an event safety plan, small meetings under 50 will have carried out a risk assessment
- The size of event will be determined by each venue in line with regulations, risk assessments and social distancing, similar to what has been carried out previously for weddings
- It is envisaged that in terms of the return of business events they will be largely domestic (NI) until Phase four. This will be determined by vaccine roll out, travel restrictions and guidelines
- It is envisaged that the majority of Visit Belfast's in-market business tourism sales and marketing activity will be required to be virtual until September 2021. Local activity may take place face to face in line with the business events re-start plan once approved

Supporting the business events re-start

In the post Covid-19 landscape, Visit Belfast has an even more crucial role to play in supporting industry recovery and facilitating a safe and successful return to live business events. This includes:

- Providing a **one-stop-shop for clients** for all aspects of hosting events in Belfast and NI post Covid-19 – new venue capacities, advice on government guidelines across all aspects of the event from travel restrictions, contracts, testing, quarantine guidelines, airport arrivals, transport, venues, hotels and social programme restrictions and alternatives; and
- **Building confidence and stimulating bookings** - Launch of an **'Open for Business campaign'** to support the announcement of a re-opening date for business events, return of office workers into the city centre and to build confidence and drive demand

Growing Business Tourism and Business Events

Belfast: Re-inventing our value proposition

The pandemic has disrupted the global business events market to such an extent that it will require Belfast to reconsider and re-invent its value proposition for clients if it is to compete for a larger share of a smaller global market.

Extensive market research has been undertaken across all markets and segments during the various phases of the pandemic and there are five 'Mega-trends' that will define Visit Belfast's success in attracting business events to the city in the coming years.

The following table summarises each of the trends, the implications for business events and Visit Belfast's strategic response.

Mega Trend	Implications	Strategic Interventions
Health, safety, and building confidence	<ul style="list-style-type: none"> - Government approved re-start date and phased re-opening plan will be required. - Vaccine progress, guidelines and travel restrictions in destination and source markets will determine response. - VB to provide important co-ordinating role and one-stop shop for clients and industry 	<ol style="list-style-type: none"> 1. NITA Business events working group re-opening plan and guidelines and pilot events 1. Open for business campaign

	<ul style="list-style-type: none"> - Pilot events will help provide evidence, case studies, learnings and build confidence – case studies, toolkits, FAQs, - Need to stimulate local corporate market to start meeting again and highly visible and understood guidelines in place to build confidence - Need to ensure strong offering for new client demands – outdoor, open spaces, duty of care for delegates and wellness 	2. Develop and promote new wellness experiences and event formats/ideas with industry
Pursuit of Purpose	<ul style="list-style-type: none"> - Post-Covid – every company and organisation will be re-evaluating WHY they are meeting, what are the benefits and is it the right thing to do. - Socially conscious values have been in focus in recent years, and the current crisis will accelerate this trend. - The number one destination criteria amongst buyers is knowledge and reputation in the sector/field¹ so Belfast must leverage its sector strengths and build its ambassador network at home and internationally to help target and win business in the sectors where it is strongest. 	4. Next generation ambassador programme launch 5. Belfast launch of the Copenhagen legacy lab 6. New Visit Belfast Impact manager 7. MICE T&F Group Investment bids – sector marketing content
Destination Financial support	<ul style="list-style-type: none"> - Destination and host city financial support is the number one support request from associations (ICCA/ABPCO) given reduced income and depleted reserves - Corporates are the most likely business segment to go 100% virtual and as a destination, a sponsorship approach would enable Belfast to incentivise and attract corporate business in key sectors. - Additional funding has been secured through the TNI MICE T&F group for conference support and un-allocated monies from the existing scheme will increase the conference support fund to potentially £1.3m compared to 400k. 	8. Existing Conference support scheme revised for events in 2021-2023 9. New Conference support scheme (£1.3m)
Hybrid, virtual and tech	<ul style="list-style-type: none"> - In the next 3 years, most events will require some form of technology and the ability to connect remote delegates and speakers virtually. - 64% of companies would prefer to meet F2F with the option of attending virtually (BCD M&E Survey) - Belfast needs to review its Hybrid proposition for the market and ensure it adapts in order to compete. - In GB, 8 core cities have come together to create Hybrid Event Solutions UK, a collaboration to deliver multi-sited GB wide national conferences. 	10. Improve our Hybrid Belfast offering destination wide – establish a task and finish group

¹ TNI Buyer Research (March 2020)

Sustainability as standard	<ul style="list-style-type: none"> - 90% of event organisers say increased focus on sustainability was critical for the events industry² - 95% of event organisers and suppliers say they are committed developing more sustainable practices - Sustainability has long been an issue in business events and tourism generally. COVID-19 has accelerated this trend and forcing destinations and industry to respond at pace - Sustainability will no longer be an area of competitive advantage for responsible destinations – it will be an area of responsibility for destinations. It is now a business imperative. - It is critical for Belfast to build back – better, embedding sustainability at the heart of its industry and DMO. 	11. Sustainable Belfast, 40 point action plan informed by GDS results and recommendations
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Driving Business Events Growth

Visit Belfast has identified eleven strategic interventions required to help drive business events recovery and growth over the next three years, as set out in the table above.

Three of which are ‘multiple programme-solvers’ and are explained in further detail below:

1. Next Generation Ambassador Programme

Over 79% of all business events come to Belfast through Visit Belfast’s Ambassador programme. It is the largest and most successful sales channel for business events in the city and will be even more critical post COVID-19. Visit Belfast will re-develop and re-launch a ‘next generation’ ambassador programme in April/May 2021 as a strategic initiative to drive future business events growth.

Invest NI will increase its investment in the programme to £100k per annum from 2021-22 and work closely with Visit Belfast, funders and key stakeholders of the programme to realise its potential and support economic recovery.

Key changes include:

- **Expand the network internationally** – leveraging Invest NI’s global office network and partnering with NI Connections to harness the power of Northern Ireland’s global diaspora to identify international ambassadors and friends of Northern Ireland that can help bring business events to the city.
- **Expand the network regionally** – Visit Belfast will work with Invest NI’s regional office network to identify potential ambassadors and opportunities outside of the city and champion the value of business events across the region.
- **Re-launch, reposition the network, increase profile and marketing** – The programme has quietly delivered phenomenal business results for Visit Belfast and industry partners over the 20 years that it has been established. However, it is not well known or understood outside of

² IMEX –GDS-Marriott Regenerative Revolution (May 2020)

the current ambassador network. To take the programme to the next level and expand internationally, it requires marketing investment and development. Visit Belfast successfully secured additional investment (£85k) through the Tourism NI MICE Task and Finish Group for concept development, marketing assets and a virtual re-launch event in April/May 2020. Visit Belfast is working collaboratively with Tourism NI and Visit Derry on the new programme concept development.

- **Leveraging economic development benefits** – Visit Belfast has had a partnership with Invest NI and Tourism NI for over six years to attract and secure business events within Northern Ireland’s key sectors. The partnership has delivered £25m in business events for Belfast in that time with a ROI of £280:1 per annum.

The next phase of this partnership will deliver more business events for Belfast and NI but also deliver more than the traditional ‘heads and beds’ KPIs. Economic development benefits from business events can include:

- Hosting global industry events in Belfast provide platforms for local companies to access global customers and partners in their sector: **Growing exports/sales** (e.g Cartoon Finance, EY)
- Conferences have a huge role to play in showcasing research/knowledge base to industry and investor: **Accelerating innovation** (e.g Cyber UK / OWASP)
- Business events are a high profile way of showcasing NI as a place to invest, do business, study, work and live: **Attract/ convert new (and support existing) investment.** (Baker Tilly Mooney Moore, Fidessa – World Financial Information Conference)
- Business events create platforms and opportunities for growing and scaling companies to access investors/partners: **Entrepreneurship and commercialisation** (e.g ICCM)
- High profile, strategic way to build Northern Ireland’s reputation in each of its sectors from cyber to life sciences: **Sector development and profile building** (IBA/ MoneyConf)

Visit Belfast will develop sector advisory panels across business, academia and industry to take a more strategic approach to sector bidding. The aim will be to develop **activation, legacy and sustainability plans** for every event secured – to deliver economic development, community and societal benefits. Each event will also have a sustainability plan developed.

Plans will be developed with Invest NI, Universities and ambassadors for strategic events to identify opportunities such as:

- Event platforms to showcase NI companies, Universities and research centres
- Speaker and exhibitor opportunities for NI companies, Universities and INI staff to be profiled
- Digital marketing campaigns around the event to promote sector strengths – micro campaigns targeting event attendees – ‘why NI for life sciences / cyber security etc’
- Identifying event VIPs of interest to INI teams, Universities and facilitating introductions and side meetings
- Securing meetings with global policy makers and business leaders attending the event
- Creating opportunities and access for NI companies and organisations to meet potential customers, suppliers and partners

- Identify potential opportunities for NI Universities – for postgraduate and PhD student recruitment, research/academic partnerships and profiling of key academics as part of the event
 - Attracting and attracting back (Diaspora) talent to work and live in NI
 - Identifying related business event leads – from exhibitors, sponsors and delegates that have their own events or conferences in the sector that could come to Belfast and NI
 - Targeting attendees for leisure tourism opportunities and/or regional NI spread – extended stays, explore wider NI, repeat leisure visit campaigns or activations.
- **Re-organisation of the programme – Sector-led approach, formalise structure and increase resources**

To be more strategic and realise longer term economic development benefits there is a need to **better structure and organise the programme**. A collaborative approach required at a **sector level** – bring together leaders from across business, Government and Universities in each sector as illustrated below.



- The new programme should have a strategic steering group with key stakeholders at senior level of sponsoring organisations
- The programme will be underpinned by virtual sector groups – who act as an advisory panel, sounding board and ‘go-to’ group of experts to identify, review and support bid opportunities in their sector.
- The sector groups will set the direction, advise on opportunities and meet virtually twice a year
- They will also review activation plans for incoming events - ensuring all opportunities are maximised and all local stakeholders are engaged
- After term served (2-3 years); group members retire to make way for new talent, but becoming alumni/associate of the programme
- Invest NI representatives should be involved on each panel (in-market or Belfast)

2. Launch of the Belfast-Copenhagen Legacy Lab

As part of Visit Belfast's new regenerative tourism model, the business events team has partnered with Wonderful Copenhagen to adapt and launch its **Copenhagen Legacy Lab (CLL) © model** in Belfast in 2021.

The CLL model is a proven, systematic methodology to drive and deliver societal, community, economic, research, policy and environmental impacts and benefits for destinations and event organisers, through business events.

This approach, will not only help to deliver ‘beyond tourism’ benefits for Belfast and NI – it will help Visit Belfast define and develop a stronger value proposition for every event bid for, which in turn, will help to attract more business to the city – but in a responsible way.

To deliver this Visit Belfast will:

- Develop a new impact manager role within the Visit Belfast business tourism team responsible for activation, legacy and sustainability
- Identify a panel of facilitators and partners that could help facilitate Belfast – Copenhagen Legacy Labs
- Launch the Copenhagen Legacy Lab model in Belfast in May/June 2021 as part of the ambassador programme
- Pilot the lab model on a number of strategic high profile events (One Young World etc)

Copenhagen Legacy Lab template – click image to see more



3. New Conference Support Scheme

Visit Belfast administers the Belfast and NI Conference Support Scheme (CSS) which is jointly funded by Belfast City Council and Tourism NI as a critical tool for attracting conference business to the region. The scheme has helped to deliver £116m of business to the city since 2011-12 with a significant ROI of £1:61.

Destination and host city financial support will be critical to stimulating business events recovery and ensuring Belfast remains competitive in what will be an increasingly competitive market place. In 2021-22, an additional £200k will be made available from Tourism NI's MICE Task and Finish Group in addition to the £400k recurring budget (BCC/Tourism NI) this will result in a total fund of up to £1.3m for conference support future awards.

Visit Belfast has been working with funders to re-launch a new CSS scheme with five key changes:

- 1. Open up the scheme by broadening the eligibility criteria to support city recovery**
- 2. Increase CSS funding and award levels per event to ensure Belfast remains competitive**
 - Whilst safety has been the number one challenge for event organisers to date, in the recovery phase, event organisers' biggest challenge will be the financial viability of events with less delegates, sponsors and exhibitors and increased risk.
 - Post-COVID, competition will be fierce amongst destinations and event organisers are likely to be a lot more risk-averse.
 - Belfast will once again be seen as a higher risk destination due to flight access which will significantly impact the city's competitiveness in the GB market which represents (65-70%) of all Belfast conferences.
- 3. Align the conference support scheme to incentivise and support those events that are committed to impact and legacy**
- 4. Investigate how corporate events that support economic development in the city could be supported**
 - Radical intervention is required to drive growth in corporate/incentive focussed meetings and events. Corporate events are most at risk of not returning post Covid-19 or moving to 100% virtual format as a legacy of Covid-19.
 - Belfast has a low market share of the corporate and incentive market. Despite good progress made, the Out of State corporate meetings market for Belfast is still around 10%. New interventions are required to stimulate growth.
- 5. Take a more strategic approach to leverage benefits for the destination through CSS funding**
 - The current scheme performs very well as an acquisition tool and to drive economic impact for the destination. However, the terms and conditions of CSS funding benefits need reviewed so that the destination and funders can leverage more strategic benefits from the event.
 - Greater focus should be on how the event organiser will promote the destination in their marketing – providing digital platforms and reach for Belfast and NI marketing content as well as participation in destination surveys and research. For example – benefits could include the event organiser committing to:

- Partnering on pre-post extender campaigns for international delegates with Tourism NI and Visit Belfast
- Promoting Belfast environmental and community initiatives to delegates
- Providing rights to marketing content from the conference itself which can be used by VB/TNI/BCC and industry to support destination promotion for example: photography at conferences, video testimonials and highlights etc.

Business Events: Key Markets and Segments

Segment	Markets	Interventions
Associations	GB & Ireland	<ul style="list-style-type: none"> - 1,600 GB Associations, strongest market segment and 65% of business - Continued PCO engagement – ABPCO, AIPCO, IAPCO, PCMA etc - New CSS scheme - New ambassador programme - New value proposition - Copenhagen legacy lab approach - Sustainable Belfast proposition - Hybrid Belfast proposition - Ramping up sales and marketing - New market development – ICC Belfast ROI strategy
	European	<ul style="list-style-type: none"> - Target key sectors only - Targeted in-market activity
	International	<ul style="list-style-type: none"> - Prioritise strategic bids for the city e.g. World One Young World etc. - Sector strategy: 2,330 International Associations with European rotation <2k delegates in Belfast key sectors
Agencies	GB & Ireland	<ul style="list-style-type: none"> - Targeted agency relationship development - GB in-market role and dedicated sales resources focussed - Team-building FAMs and site visits for key agencies - Targeted account management strategy with major agencies and boutique/independent agencies
	European/Int	<ul style="list-style-type: none"> - Maximise European/Int sales platforms and tradeshow
Corporate	GB & Ireland	<ul style="list-style-type: none"> - Increase from 10-20% in three years - New ambassador programme – targeting key sectors and diaspora network - Hybrid Belfast proposition will be key - Sustainable Belfast proposition
	European/Int	<ul style="list-style-type: none"> - Leverage INI global office network and NI connections programme – Diaspora - Leverage OYW, Super Cup and other major events
Incentive	GB European and International	<ul style="list-style-type: none"> - New opportunities post COVID with GB corporate and agency market for closer to home incentives - Support reactive incentive enquiries and leads - Partner and co-ordinate with TNI and DMCs, as appropriate

Strategic project delivery timelines:

- Open for business... local corporate market meetings campaign (to be confirmed with opening date 2021)
- New Ambassador Programme (May 2021)
- New Conference Support Scheme (May 2021)
- Sustainable Belfast Programme (ongoing – launch April/May 2021) and become a certified DMO by 2022
- Copenhagen Legacy Lab model launch (May/June 2021)
- Hybrid Belfast proposition review and relaunch (May 2021)
- Northern Ireland Business Tourism Strategy (2021-22)

Travel Trade

The travel trade is an important segment for Visit Belfast partners, particularly amongst accommodation providers, attractions, tour operators, activity providers, bars and restaurants. Following a very challenging 12 months which saw widespread redundancies, closures and remaining staff largely furloughed across the sector; larger operators are now starting to re-engage and plan for recovery.

While the industry was originally hopeful of a 2021 recovery, operators are now anticipating a later re-start with 'normal' programming not likely until 2022.

Key trends in the sector include:

- Inbound travel to the UK is likely to be at 41% in 2021 compared to 2019 and at 32% of spend levels compared to 2019 (UK Inbound, Jan 2021)
- High and low seasons are likely to change depending on when international resumes and this is anticipated to be later in season for 2021
- Many operators traditionally focused on the international inbound market are diversifying and launching new itineraries for the domestic market
- With complex travel restrictions and changing protocols across destinations, it is likely that there will be a greater demand for organised tours and travel trade in the return phase which may slow the pre-COVID trend of increasing FIT and independent travellers
- Post COVID, research is showing that visitors are more likely to book through an operator as before it is easier to manage, helps with changes or cancellations/refunds and operators can provide more assurance and financial protection
- There will continue to be consolidation of the travel trade market with the larger operators prevailing over the smaller, independent operators

Return of Group business

Market trends and operator feedback highlights the following changes:

- Group sizes will likely be smaller (approx. 8), operate within smaller bubbles and at reduced capacities
- Greater demand for ad-hoc tours compared to set series tours, particularly for 2021
- Groups are likely to be from same family or household in the early stages
- Stringent protocols will be in place
- Flexibility with contracts and changes will be pre-requisite
- Operators require clarity on 2022 rates much earlier than before (now)
- Greater demand for outdoor and wellness experiences
- Greater demand for bespoke and personalised tours which can be charged at a higher rate
- Reassurance required on protocols and flexibility with changes

In the recovery period, Visit Belfast has an important role to play to support the travel trade, providing a one-stop-shop for incoming operators considering Belfast and Northern Ireland. Visit Belfast will offer guidance and support on protocols for incoming operators and groups, updates on product changes, new itinerary development and provide enhanced account management to support travel trade during this challenging period.

Market Prioritisation and Key Account Management

Working with Tourism Ireland, Visit Belfast has identified priority geographic markets for Belfast to develop relationships with both existing and new operators that sell European, UK and Ireland products. Visit Belfast has also established regular planning meetings with Tourism NI to co-ordinate activities, plans and share market intelligence.

Given the trends in the sector, Visit Belfast will focus its efforts on providing key account management support for its 59 Gold operators and GB & Ireland operators will be a priority for 2021.

Re-prioritised markets	Rationale
GB & Ireland	High volume, high propensity, established operators with room for growth. Best prospect for partial 2021 return
North America	High value, high propensity, increased Dublin access, increased demand and growth – supporting medium term recovery 2022 onwards
Europe (Tier 1) Germany, Austria, Switzerland & the Netherlands	Good volume, lower spend, opportunity for Belfast to be included as part of a UK/Ireland itinerary. Markets have a strong propensity to book via tour operators & travel agents – supporting medium term recovery 2022 onwards
Europe (Tier 2) France, Spain, Italy and Nordics	Lower travel trade volume, market has as strong propensity to travel independently with proactive operators who require support and deliver reasonable volumes – supporting medium term recovery 2022 onwards

Sales and Marketing Activity

It is envisaged that all sales and marketing activity will be largely virtual until September 2021 with the possibility of face-to-face activity between October 2021 and March 2022.

Visit Belfast will focus its efforts on priority sales and marketing platforms during 2021-22, including:

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

3.3 Visitor Servicing

Visit Belfast's visitor servicing activity is based around a Hub and Spoke model – the Visit Belfast Welcome Centre acting as the hub and the supporting spokes being the Airport VICs, the Cruise Welcome Hub, off-site self-serve kiosks, and Visit Belfast's outreach, volunteer and industry engagement programmes.

Visit Belfast Welcome Centre, Airport VICs and the Cruise Welcome Hub are Belfast and Northern Ireland's front-of-house visitor welcome, showcasing the city's tourism industry, providing key sales platforms for the industry to engage with visitors and are a key source of visitor feedback and data. Research undertaken across the three VICs in 2019, indicated:

- 78% were first time visitors to Belfast
- 77% said that their visit would make them more likely to spend more in Belfast / Northern Ireland
- 68% said that their visit to a VIC would encourage them to stay longer
- 81% said that it would make them more likely to visit somewhere they had not thought of before
- 92% said their visit would encourage them to come back to Belfast/Northern Ireland as a repeat visitor

In addition, the VICs operated by Visit Belfast provided a key gateway role with 34% of all enquiries relating to the rest of Northern Ireland, confirming that visitor servicing is an essential and effective tool to increase visitor spend, visitor satisfaction, length of stay and regional spread whilst delivering the Belfast and Northern Ireland brand of a safe, warm, welcoming and authentic experience. Visitor servicing is the front line in providing assurance to visitors to Belfast and Northern Ireland and the local community thereby building confidence in the safe return of tourism.

Impact of Covid-19

Lockdown resulting from the pandemic meant that three VICs were open to the public for only 171 days in 2020-21, whilst the Cruise Welcome Hub has been closed throughout 2020-21. This limited opening, combined with tight restrictions on travel into Northern Ireland and the Republic of Ireland, including the need to quarantine, has severely impacted on footfall into our centres. Year to date just over 82,000 visitor enquiries have been handled.

The visitor servicing team have continued to meet visitors' information needs and provide an important support and sales service to many industry partners. Communication channels have pivoted to email, Twitter and Quick Chat in order to meet the demand for pre-travel information and advice, resulting in a 43% increase in the volume of enquires by email and Quick Chat. The changing environment and the different restrictions across NI, ROI, GB and international markets has caused a lot of confusion for visitors, leading to lengthy, complex and often difficult visitor enquiries. During 2020-21 the team has implemented necessary efficiency savings whilst been able to maintain the capacity, capability and skills required to deal with often complicated, essential and complex visitor enquiries from both locals and visitors alike.

Visitor Servicing 2021-22: A Different Approach... Building Confidence

2021-22 will be a critical year for Belfast and Northern Ireland as the recovery starts. It will be more important than ever that Visit Belfast provides assurance to visitors travelling here, and reassurance to locals accepting visitors back into their communities in line with PHA guidelines. By providing professional welcome, orientation, information and inspiration for visitors, prior to visiting and at key points-of-entry, Visit Belfast Welcome Centre, Airport VICs and the Cruise Welcome Hub will help build confidence in the safe return of tourism.

Over the last number of years there has been a 70% increase in demand for visitor servicing which Visit Belfast has met by developing a very successful business model across all four VIC sites generating 49% of running costs from commercial income. This commercial activity has meant that Visit Belfast has been able to meet this increased demand without requiring an increase in public sector funds.

In 2021-22, we expect a reduction in commercial revenue due to the uncertainty in the easing of restrictions and the unpredictability of visitor numbers. This reduction in commercial revenue is projected to be circa £300k less compared to 2019-20 levels. The challenge for us will be the impact this will have on our capacity to meet the growth in enquiries as the industry opens up compounded with the increased complexity of these enquiries.

A New Operating Model – Flexible “Just in Time”

A new flexible “just in time” staffing model for 2021-22 will enable Visit Belfast to flex resources across the Visit Belfast Welcome Centre, Cruise Welcome Hub and Airport VICs to meet the fluctuating and unpredictable patterns of demand.

This new approach will require a restructure and refocus, switching from a larger core team of staff that were location-specific to a smaller, more flexible core team, supported by well-trained seasonal and on-call staff able to work across all four visitor servicing sites. This approach will effectively address the likely slow recovery of tourism in Q1 and part of Q2 of 2021-22 and the unpredictability of seasonality given that Q3 and Q4 are likely to be busier than previous years due to the timing of restrictions being lifted.

As we move through the recovery period with demand predicted to increase from the middle of Q2 through to yearend, and with both airports likely to get busier and cruise ships starting to return we will utilise our core, on-call and seasonal staff to extend opening times and hours at both Airport desks and the Cruise Welcome Hub.

This flexible “just in time” staffing model can provide critical information and reassurance to visitors prior to visiting, and on arrival into the destination, and in doing so, supporting the Visit Belfast partner businesses, the wider tourism industry and help protect and create tourism jobs. This approach will be part of Visit Belfast’s recovery and Building Back Better strategies.

This restructuring aims to achieve the following:

- Positively engage and provide welcome and reassurance to approx. 450,000 visitor enquiries, delivering an economic benefit of circa £9m
- Handle circa 152,000 gateway enquiries
- Maintain visitor satisfaction levels of 85% very satisfied

- Provide a warm and reassuring welcome to cruise passengers on up to 60 – 80 cruise ships arriving between June and November
- Maintain quality visitor servicing at key visitor touch points through 2021 recovery - encouraging people to stay longer, spend more, visit places they had not previously considered and increase the likelihood of a repeat visit
- Reinvigorate the volunteer team to support Visit Belfast when demand levels increase.
- Bring the “welcome” to key areas of demand, in the city centre and at events, by using a new pop up gazebo, fitted with a portable till system and iPads
- Support local tourism business by providing sales and profiling opportunities
- Extend Visit Belfast’s Industry Engagement Programme, critical in informing returning front line staff on the new norm, what there is to do in the city and surrounding areas and any other relevant PHA guidelines

Operational Changes

The following operational changes for each of the VIC sites will be in place for 2021-22, however as demand increases and revenues improve we intend to reinstate operations to full capacity:

Visit Belfast Welcome Centre <ul style="list-style-type: none"> - Reduced Sunday opening in low season - Reduction in working hours for some core contracts - Reduction in use of seasonal/on-call staff 	Cruise Welcome Hub <ul style="list-style-type: none"> - No animation, cruise monitors or cruise events - No Cruise coordinator recruitment until later in season - More use of volunteer programme - VBWC core team will deliver visitor servicing at the Cruise Welcome Hub
Belfast International Airport Desk <ul style="list-style-type: none"> - Peak season opening days would be reduced from 7 to 6 days - Shoulder season opening days would be reduced to 4 to 5 key days dependent on demand - Opening hours would be matched carefully to the flight schedule 	George Best Belfast City Airport Desk <ul style="list-style-type: none"> - Peak season opening days would be reduced from 7 to 5 days - Shoulder season opening days would be reduced to 3 to 4 key days - Opening hours would be matched carefully to the flight schedule

Visitor Servicing Footfall and Enquiry Targets 2021-22

Over the last six years to 2019-20 the total number of enquiries handled has increased by 70% and the number of visitors to the three VICs has increased by 66%. However for 2021-22 there is a much reduced target. Due to the impact of the ongoing pandemic, Visit Belfast’s three VICs and Cruise Welcome Hub aim to handle 450,000 enquiries and deliver an estimated £9m into the local economy.

- Handle a total of 450,000 enquiries (52% of 2019-20 levels)
- Projected 314,900 visitor footfall
- Generate net commercial income £253,650
- Maintain visitor satisfaction levels (85% very satisfied/satisfied)

Visit Belfast Welcome Centre: the target for VBWC is to handle a total of 288,800 enquiries:

- Handle 288,800 enquiries at VBWC
- 197,555 visitors through the door in VBWC
- Generating £6m to the local economy

Airport VICs: In 2020 due to the impact of Covid-19, both airport VICs have dealt with 15% of 2019-20 enquiry levels. With the current lockdown, slow roll out of vaccines in European markets, and advice dissuading overseas holiday bookings, it is likely that demand will come mainly from Great Britain and only start to build from the summer onwards. Therefore estimated demand is:

- 100,700 enquiries handled at BIA (-57% on 2019-20)
- 60,700 enquiries handled at GBBCA (-40% on 2019-20)
- Generate £3m into the local economy

Gateway Role

Across all visitor touch-points approximately 34% of all enquiries are gateway specific. The volume of gateway enquiries handled by Visit Belfast over the previous six years to 2019-20 has increased by 58%. For 2021-22 Visit Belfast is targeting 152,000 gateway enquiries. These gateway enquiries will generate approximately £3m into the regional economy which is a very positive return on Tourism NI's annual visitor servicing funding support of £1 invested generating an additional £21 into the local economy.

Income Generation

Across the three VICs, and the Cruise Welcome Hub, Visit Belfast aims to generate £253,700 which equates to 28% of total VIC running costs. Income will be generated from net retail sales (£61,150), ticketing commissions (£41,500), services charged out and desk sales (£70,400), other commissions and airport support (£25,600), and sales of advertising platforms (£55,000).

VBWC Retail Sales

Due to the decrease of footfall due to travel restrictions and localised lockdowns over the past 11 months, the corresponding impact on retail sales in 2020-21 has been significant, we are currently working on several projects to generate revenue for VBWC.

Online Retail Sales: VBWC will implement a one year pilot project for an online shop. The aim would be to provide an extra channel for retail sales, promoting and selling local craft items as well as VBWC's top sellers. This platform would sit on VisitBelfast.com and include all the necessary pricing for ordering and postage.

Volunteer Programme

Visit Belfast's 11-strong volunteer team provide an essential support in the delivery of visitor services, helping to meet fluctuating visitor demand levels, particularly during the cruise season, as well as assisting at conference and event welcome desks. During 2019-20 the team was stood down due to

reduced demand and for the protection of the team. In 2021-22 the plan is to reinstate the team to work alongside our visitor servicing teams across all visitor servicing activity.

Belfast Welcome Ambassadors

In 2021-22, opportunities will be explored with all of the BIDs to co-develop an Ambassador Programme for the city. This will complement the volunteer programme, providing a visible presence across the city at busy periods or at key events, offering an essential visitor service welcome, information and assurance to people visiting our city.

Cruise Ship Servicing

Cruise Belfast has been working with cruise lines to retain as many of the cruise calls as possible. The planned arrival of the MSC Preziosa on 22 April will mark the start of the 2021 cruise season which is scheduled to continue up until 17 November. At time of writing, 118 ships are booked to arrive in to Belfast, bringing an estimated 260,000 passengers and crew.

Ensuring the Safe Return of Cruise Calls

As part of the international cruise recovery, all ports are required to have a Covid-19 Port Management Plan in place. Visit Belfast is part of a Belfast Cruise Operations Group, including Belfast Harbour, Belfast Harbour Maritime Policing Unit, Public Health Agency (PHA), Port Health Agency and a representative from Belfast City Council's Emergency Response Team. This group currently meets fortnightly and will finalise a Covid-19 management plan shortly. This plan will be shared with visiting cruise lines in advance of calls and cruise lines will share their Covid-19 protocols in advance to ensure that the ship and port protocols are aligned.

Guidance for protocols for cruise ship operators, ports, crews, passengers, and excursions are being developed by the UK Chamber of Shipping. Additionally, the UK Chamber of Shipping and the UK Public Health Agency are coordinating a four-nations approach to cruise safety. Northern Ireland's Public Health Agencies Emergency Planning Co-ordinator is liaising with their counterparts both in the UK and in the Republic of Ireland to ensure the new guidelines are aligned as closely as possible.

Tourism NI through the Tourism Recovery Fund has allocated £112,500 to Visit Belfast and Belfast Harbour to put in place the safety measures necessary to protect cruise passengers, crew, Visit Belfast and Belfast Harbour staff as well as the wider resident population.

A safe return to receiving cruise passengers necessitates a greater coordination between the Port, cruise lines, excursion companies, and local attraction and tour providers. Visit Belfast is facilitating this coordination to ensure that appropriate itineraries and cruise options are developed that take into account the changed environment, and the cruise lines' 'Early Return to Cruise' requirements that passengers can only go on shore in small groups, remain in "bubbles", and only participate in the cruise lines' own shore excursions programmes.

Visit Belfast will work with Belfast Harbour, Belfast City Council and Tourism NI, to coordinate a 'safe return to cruise' message to ensure support from the local community for the return of cruise both to the city and the wider region.

Industry Engagement Programme

Visit Belfast delivers an industry engagement programme to build local destination knowledge amongst visitor-facing staff across the industry. Restrictions have necessitated the pivoting to a hybrid model, using webinars and digital platforms. As part of Visit Belfast's drive to build back better, the team will work with Belfast City Council's capacity growth schemes to provide participants with a recognised accreditation programme, such as a 'Belfast Destination' certificate. Visit Belfast's Industry Engagement Programme is a crucial programme as business reopen and staff return to their posts, needing to retrain and gain the latest information, opening times and restrictions for attractions and tours.

Visit Belfast Industry development for 2021-22 will include:

- Quarterly seasonal briefings (live and webinar)
- Two familiarisation visit to key attractions and products
- Weekly 'What's On' e-zine sent to front-of-house staff
- Monthly What's on in Belfast Updates sent to the rest of VIC network
- Six 'Pop-In and See' events (live and webinar)

Love Local Community Engagement

Visit Belfast's new 'Love Local' initiative aims to strengthen local community connections by sharing updates, best practice, insights and information with organisations who also provide visitor information in their local communities.

Information on local culture, locally made food, drink, music and crafts will be collated, updated regularly and will be made available to visitors and shared with local visitor information centres such as Eastside Visitor Centre, An Cultúrlann and Queens Visitor Centre, the NI VIC network as well as Translink teams working in booking offices and with privately operated visitor information providers. In addition, three of the six "Pop In and See" events will be local/community based in 2021-22.

Enhancing Technology in Visit Belfast Welcome Centre

The technology and digital assets in the VBWC and off-site locations are used to enhance the visitor experience, to inform and inspire visitors and provide commercial income revenues. Through Tourism NI capital support, Visit Belfast has secured £70,800 to upgrade the technology in VBWC, ensuring the continuation of a 'Best in Class' service.

This project will enable Visit Belfast to upgrade touchscreens, monitors, digital signage and media players. Making the visitor journey more intuitive and content more inspirational, encouraging visitors to do more and spend more in the city and creating an opportunity to gather further market data.

Upgraded Hardware and Media Players – A pre-evaluation questionnaire was issued to industry technology experts to ensure we optimised our purchases using the latest and high performance technology available on the market.

Visit Journey Commercial Islands – Part of the funding will be used to enhance the visitor journey whilst engaging and using the interactive screens. A new design, layout and use of QR codes to assist the visitor in planning their visit, and through the use of QR codes download information directly to

their device. The 42-inch monitors will be replaced, creating a reinforced platform for our partners to promote their products and inspire visitors to do and see more while in the city and region.

Face Profiling Technology – Software available within content management systems that will allow VBWC to profile the people looking at our screens. This will give us useful data, based on certain parameters, such as whether someone is male/female, age profile and mood profile. This will eventually allow us to play promotions / advertisements dependent on profile of the person.

New Digital Belfast Interactive Map – We will be working with our developers and design agencies to redevelop the existing Belfast Map to display information and key content on the city, its neighbourhoods, key attractions, hidden gems, and connections from the city centre out to local areas, spreading the benefits of tourism. The new digital Belfast map will be incorporated as part of the Belfast 3D map as you enter the centre.

City Imagining Island - this Island will have a focus on Belfast's arts and cultural assets in support of Belfast City Council's Cultural Strategy, particularly in the run up to the year-long cultural celebration @Home2023 as well as the Council's bid to become a UNESCO City of Music. The island screens and display areas will promote and showcase the City's arts and cultural assets, heroing the many assets found across the city with a focus on music, the arts, food and drink, maritime heritage, green spaces and neighbourhoods. A complete, easy to navigate, directory will be included, content will be fresh and inspiring encouraging visitors to do more and experience more while in the city.

VBWC is currently in the process of upgrading the Wi-Fi connection in the welcome centre to fibre connection, meaning faster, more reliant download speed and capacity which will boost the features for our upgrade technology.

Phase Two of the project (subject to funding and planned for later in 2021-22) will include replacement of the large video wall, a fully integrated Digital City pass, and additional new smart software technology such as voice search, translations and augmented reality digital assets. We will also aim to further establish the VBWC role as the City Box Office for events in the run up to City Council's year of Cultural Celebrations in 2023.

Visitor Insights

Visit Belfast's three VICs continue to provide a rich source of visitor data and insights - collating a wide range of visitor profile, destination interest and transactional data from a variety of sources including the Visitor Satisfaction Survey traditionally completed each year across the three VICs, and this year the Cruise Welcome Hub (target 1,500 surveys p.a.)

Tourism NI has provided funding to purchase desk iPads and work off a shared back-end system to electronically capture visitor data, profile, and satisfaction levels utilising Visit Belfast sites and staff focused on city wide experiences.

Training

JAM Card

Visit Belfast will continue to contribute to and support the Belfast Agenda's vision of making Belfast the first JAM city and helping to make the city a safe, inclusive area for all, by ensuring all frontline staff are trained appropriately. The JAM Card allows people with a learning difficulty,

autism or any communication barrier to tell others that they need 'just a minute', discreetly and easily - to date 500 plus businesses across the UK have been trained in JAM Card.

VIC Network

Visit Belfast will continue to provide all other VIC's in the Northern Ireland tourist information network training on ticketing, commercial opportunities and merchandising, hosting four virtual meetings annually with Q&A sessions.

4. Visit Belfast 2021-22 Outcomes

VISIT BELFAST TOTAL OUTPUTS	2021-22 Target
Leisure Tourism Bed nights	90,000 bed nights
Leisure Tourism Day trips	100,000 day trips
Business Tourism Bed nights	60,000 bed nights
Cruise Visitors	338,800 pax & crew
Visitor Enquiries	450,000 enquiries
Visit Belfast Economic Impact	£74m

VISIT BELFAST ECONOMIC IMPACT	2021-22 Target
Leisure Tourism	£20m
Business Tourism	£30m
Cruise Tourism	£15m
Visitor Servicing	£9m
Visit Belfast Economic Impact	£74m
Budget	£3.3m
ROI	£1:23

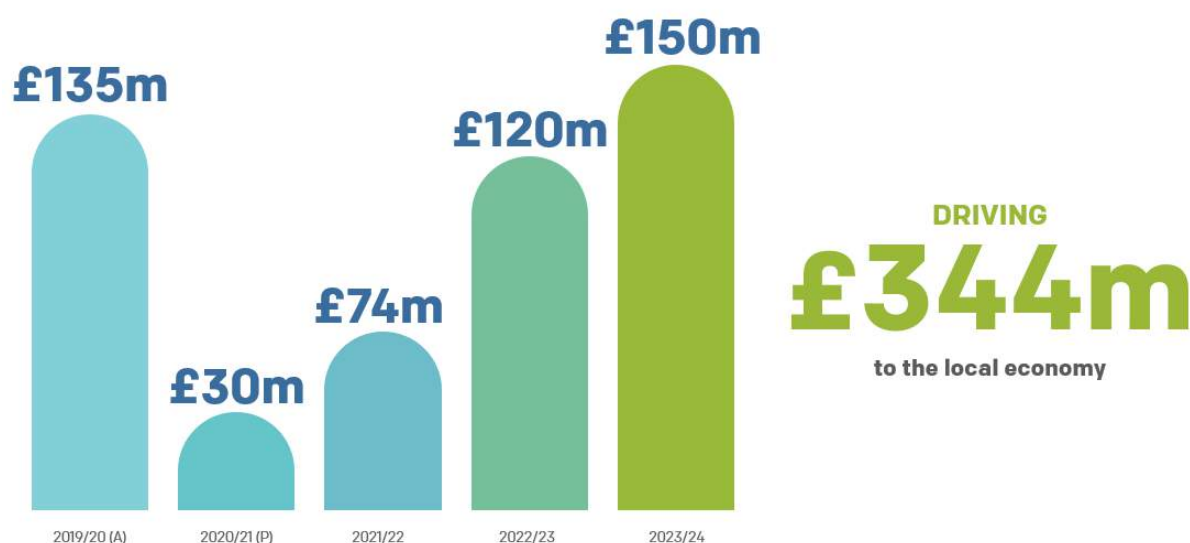
Visit Belfast Change Projects – 2021-22 Outcomes

- Visit Belfast to become a Green Tourism certified DMO by year end
- Green Tourism Partnership Scheme – 50% industry sign up
- 30% of Visit Belfast won business events in 2022 will have a sustainability plan
- 30% of Visit Belfast won business events in 2022 will have an impact/legacy plan
- Improve Belfast's GDSI score in order to achieve improved ranking
- Launch the Copenhagen Legacy Lab model for business events by Q2
- Launch new conference support scheme in partnership with BCC/TNI by Q2
- Launch next generation ambassador programme in partnership with Invest NI by Q2
- VBWC technology upgrade during Q1
- Visit Belfast IT infrastructure review and implementation by Q4
- Organisational realignment completed by Q2

5. Conclusion

Visit Belfast's three year recovery plan **Rebuilding City Tourism 2021-24** sets out a new direction of travel and a step change in Visit Belfast's marketing, sales and visitor servicing operation, by putting sustainability, inclusive growth and the citizens of Belfast at the heart of its organisation, its operations and its outputs.

The 2021-24 three year Visit Belfast recovery strategy will deliver £344m in to the local economy giving a return on investment of £31:1, building a resilient economy, delivering inclusive growth and protecting the environment.



This plan is fully aligned to the City's strategic priorities as set out in the Belfast Agenda, Inclusive Growth Strategy, Belfast Resilience Strategy, A City Imagining Cultural Strategy, the Belfast Recovery Plan and also the Northern Ireland Five Point Recovery Plan, and the Northern Ireland Tourism Recovery Plan. Using outcome-based accountability, Visit Belfast is clear in how its targets, KPIs and operations will contribute to the achievement of these city-wide strategies.

Tourism, and in particular Belfast City Region, are key to Northern Ireland's economic recovery. The Belfast City Region is well placed to capitalise on pent up demand for travel when restrictions are lifted; and this plan will ensure Belfast City Region is market and operationally ready.

The 2021-22 Operational Plan will deliver £74m in the local economy, a return on investment of £23:1, supporting local tourism businesses by driving demand, creating bookings and welcoming visitors. Transformational projects and initiatives such as Global Destination Sustainability Action Plan, the Copenhagen-Belfast Legacy Lab, accelerating the digitalisation of Visit Belfast's marketing, sales and visitor servicing, and the restructuring of visitor servicing will make Belfast more competitive in the post-Covid market place; and deliver on the City's goals of inclusive growth, social value and transitioning to a low carbon economy.