



# Belfast Local Development Plan

Technical Supplement 5

Tourism

August 2018

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**Belfast**  
City Council

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## 1.0 Introduction

### **Purpose of this Document**

- 1.1 This technical document has been prepared to draw together the evidence base that has been used to inform the preparation of the Belfast Local Development Plan (LDP) 2035. It is one of a suite of topic-based Technical Supplements that should be read alongside the LDP to understand the rationale and justification for the policies proposed within the draft Plan Strategy.
- 1.2 It builds upon the suite of 17 thematic Topic Papers prepared and published alongside the Preferred Options Paper (POP), which established the baseline position as at January 2017, and identified the key issues to be considered when preparing the LDP. The Tourism Technical Supplement therefore updates the baseline position and sets out the evidence base that has informed the Tourism policies within the draft Plan Strategy.
- 1.3 As stated, this is part of a series of Technical Supplements thematic reports to accompany the draft Plan Strategy. Whilst each of the Technical Supplements can be read separately, there are inevitably some important related matters and background evidence within other Technical Supplements.
- 1.4 It should be noted that the data collected to inform the LDP also forms the evidence base on which a series of additional assessments and appraisals are required as part of the plan preparation process, and the Sustainability Appraisal. By combining the evidence gathering stages for both the Sustainability Appraisal and Local Development Plan, we aim to streamline the documentation produced and avoid duplication. It will also help to ensure that sustainable development is embedded in the planning process and that the Sustainability Appraisal is one of the main drivers informing the preparation of the LDP.

### **Planning and Tourism**

- 1.5 Belfast has become a significant tourist destination that has helped to support the local economy, and encouraged employment opportunities. The unique natural heritage of the Lough, Lagan Valley Regional Park and Hills are significant environmental assets, and its cultural resources, give it enormous potential to drive the tourism economy to facilitate employment growth and generate additional income through visitor expenditure. The city is a major gateway destination for visitors and tourists who travel via the seaports, the airports, road and rail network from the UK, Ireland, and elsewhere. Major growth markets include business trips facilitated by new conference facilities, short city breaks for leisure, and cruise tourism. Belfast has a distinctive cultural scene that generates a vibrant evening economy that needs to be nurtured and protected. The Belfast Tourism Strategy aims to strengthen the hospitality and service sectors and develop new tourism attractions to ensure the city has the capacity to compete with other European destinations.

## Technical Supplement 5: Tourism

- 1.6 Regional policy advises that Councils should adopt a sustainable policy approach in the protection and provision of tourism infrastructure that would help to grow the economy to benefit society as a whole. Proposed policies will need to consider the tourism sector within the Belfast Local Government District; to ensure how the unique tourism assets can be safeguarded, developed and improved to create a distinctive sense of place that is attractive to tourist, visitors and locals alike. It will be important that the Local Plan, including the Plan Strategy reflects the aspirations of the Belfast Agenda, the local Community Plan, to protect and grow the tourism sector that will increase visitor numbers and tourism expenditure within the city. The plan will need to consider how to improve the tourism infrastructure to promote accessibility between the various tourism assets whilst protecting the city's cultural, built, and natural assets.
- 1.7 The Technical Supplement sets out the policy context, followed by an examination of the existing tourism profile and sectors. It provides an indication of future opportunities to further enhance Belfast city as the regional capital and to consider issues such as managing the tourism offering without damaging the character of the city's natural environment, built heritage or cultural assets.
- 1.8 It is important to stress that in compiling the Technical Supplement the best information available at the time of preparation has been used (June 2018). The paper provides a foundation for the preparation of the proposed policies contained in the Plan Strategy for Belfast LGD. In compiling the Technical Supplement the main sources of information have included the Tourism NI, Tourism Ireland, Visit Belfast, Discover Ireland, NISRA and the Belfast Integrated Tourist Strategy 2015-2020.

## 2.0 Policy Context

### Regional Policy

#### **Draft Programme for Government 2016 – 2021**

- 2.1 The key aim of the draft Programme for Government is to grow a sustainable economy through investing in the future, tackling disadvantage, improving health and wellbeing, protecting the people and the environment, building a strong and shared community and delivering high quality services. The Programme for Government recognises the potential for tourism, culture, arts and leisure as instruments for positive change. A key indicator identified in the framework is, “improving our attractiveness as a destination”, which is to be measured by the total spend by external visitors. The draft Programme for Government recognises that the tourism and hospitality industry is one of the region’s key service sectors. It offers huge growth potential, and the best opportunity for Northern Ireland to strengthen its economy.
- 2.2 The regional planning policy context is provided by the Regional Development Strategy (RDS) 2035 and the Strategic Planning Policy Statement. A summary of these documents as they pertain to plan making and tourism policy is provided below.

#### **Regional Development Strategy (RDS)**

- 2.3 The RDS 2035 provides a framework to support the growth of tourism in Northern Ireland. There are a number of regional guidelines, which seek to guide long term policy direction:-
- RG4 seeks to promote a sustainable approach to the provision of tourism infrastructure by promoting a balanced approach that safeguards tourism infrastructure while benefiting society and the economy; improving facilities for tourists in support of the Tourist Signature Destinations and encouraging environmentally sustainable tourism development.
  - RG7 seeks to support urban and rural renaissance.
  - RG11 seeks to conserve, protect and where possible enhance our built heritage and our natural environment.
  - SFG5 seeks to protect and enhance the quality of the setting of the BMUA and its environmental assets.
  - SFG13 seeks to sustain rural communities living in smaller settlements and the open countryside.
- 2.4 Investment in tourism brings new facilities to our towns, cities and surrounding landscapes, thereby creating a sense of pride for the people of Northern Ireland. It also provides the opportunities to get maximum benefit from our wealth of environmental and heritage assets; our waterways, landscapes, coastline and built heritage.

- 2.5 The RDS identifies Belfast Lough, Lagan Valley Regional Park and the hills around the BMUA as significant environmental assets; and Belfast as a major Regional City Gateway with the principal seaport and a city airport. Any local development plan proposals should be mindful that environmental assets cross neighbouring local government districts.

**Strategic Planning Policy Statement (SPPS)**

- 2.6 The Strategic Planning Policy Statement (SPPS) was adopted in September 2015 to replace the Department for Infrastructure's (DfI) Planning Policy Statement's (PPS) as an aid to shorten and simplify the guidance. The aim in relation to tourism development is to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment. The SPPS sets objectives to:-

- Facilitate sustainable tourism development in an environmentally sensitive manner;
- Contribute to the growth of the regional economy by facilitating tourism growth;
- Safeguard tourism assets from inappropriate development;
- Utilise and develop tourism potential of settlements by facilitating tourism development of an appropriate nature, scale and location;
- Sustain a vibrant rural community;
- Ensure high standard of quality and design.

- 2.7 The SPPS states that plan-making councils will consider how best to facilitate the growth of sustainable tourism tailored to the needs and assets of their local area to reflect wider government initiatives and tourism strategies.

**Planning Policy Statements**

- 2.8 The RDS is complemented by the Department for Infrastructure's (DfI) Planning Policy Statements (PPS), the most relevant of which is PPS16 Tourism setting out the DfI's planning policy for tourism development, and safeguarding of tourism assets. It seeks to facilitate economic growth and social well-being in ways, which are sustainable and compatible with environmental welfare, and the conservation of important environmental assets. The document comprises policies regarding tourism development in settlements, amenities in the countryside, hotels, guesthouses and hotels, self-catering and holiday parks, general and design criteria and the safeguarding of assets.
- 2.9 PPS2 Natural Heritage and PPS6 Planning, Archaeology and the Built Heritage are key considerations due to the importance of natural resources and built assets within Belfast LGD. PPS8 Open Space, Sport and Outdoor Recreation recognises the importance of the countryside for recreation and its contribution to the rural economy and tourism.



- 2.10 PPS21 Sustainable Development in the Countryside seeks to conserve and enhance the environment whilst improving the quality of life of the rural communities and developing the rural economy. This document comprises policies in relation to farm diversification; conversion and reuse of existing buildings and on integration, design and rural character. Following Local Government Reform, the Belfast City Council area has extended and includes lands in Colin Glen, Cave Hill, Lagan Valley Regional Park, Belvoir Park, parts of the Craigantlet Hills, the Castlereagh Hills and the three small settlements of Hannahstown, Edenderry and Loughview. However, the Council area remains contextually urban.

### **Living Places - An Urban Stewardship and Design Guide for Northern Ireland**

- 2.11 This Urban Stewardship and Design Guide aims to clearly establish the key principles behind good place making. It seeks to inform and inspire all those involved in the process of managing (stewardship) and making (design) urban places, with a view to raising standards across Northern Ireland. The focus of the guide is urban areas, by which is meant all of our cities, towns, villages and neighbourhoods. It recognises the wider economic, cultural and community benefits of achieving excellence in the stewardship and design of these important places, be they existing or newly proposed.

## **Local Policy Context**

### **Belfast Urban Area Plan (BUAP) 2001**

- 2.12 The current development plan for the majority of the Belfast district is the Belfast Urban Area Plan (BUAP) 2001, which was adopted in December 1989. The area covered by the Plan included the whole of the administrative area of the former Belfast City Council area, together with the urban parts of the former District Council areas of Castlereagh, Lisburn and Newtownabbey as well as Greenisland and Hollywood.
- 2.13 The purpose of the BUAP was to establish physical development policies for this broad urban area up to 2001, clarifying the extent and location of development and providing a framework for public and private agencies in their investment decisions relating to land use. Although alterations were made in 1996, the BUAP is now largely out-of-date and was formally superseded by the Belfast Metropolitan Area Plan (BMAP) 2015 in September 2014. However, BMAP was quashed as a result of a judgement made in the Court of Appeal on 18 May 2017, meaning that the BUAP 2001 remains the statutory development plan for most of the Council's area.

### **Belfast Metropolitan Area Plan 2015**

- 2.14 The BMAP 2015 was published by the Department for Environment (DOE) in September 2014. It is a joint plan covering the original City Council areas of Belfast and Lisburn and the Borough Council areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. Although its boundaries no longer match the new

11 Council districts established as part of the reform of local government, the whole of the new Belfast City Council area falls within its remit.

- 2.15 Although formally adopted in 2014, this process of final BMAP adoption was declared unlawful as a result of a judgement in the court of appeal delivered on 18 May 2017. This means the Belfast Urban Area Plan (BUAP) 2001 and the other Development Plans provides the statutory plan context for the area. However, BUAP was published in 1990, nearly 30 years ago. The Belfast City Council Plan Area has undergone massive transformation since then, particularly in the city centre. The formal development plans which apply are dated and silent on many of the planning issues pertinent to needs of current planning decision making. In recognition of this unique circumstance and taking account of the short term transitional period in advance of the adoption of the Local Policies Plan it is important to provide clarity in relation to the application of planning policy.
- 2.16 Draft BMAP, in its most recent, post-examination form remains a significant material consideration in future planning decisions. It was at the most advanced stage possible prior to formal adoption. Draft BMAP referred to throughout this document therefore refers to that version. However, in preparing this document the council has also had regard to the provisions of the draft BMAP which was published in 2004, the objections which were raised as part of the plan process and the Planning Appeals Commission Inquiry report.
- 2.17 The SPPS's transitional arrangements provide for continuity until such times as a new LDP for the whole of their council area is adopted to ensure continuity in planning policy for taking planning decisions.
- 2.18 BUAP contains less zonings or designations than draft BMAP and delineates a city centre boundary which has expanded significantly since then by virtue of the application of Draft BMAP. The council therefore intends to use a number of the existing designations contained in the draft BMAP, insofar as it relates to the Belfast City Council Plan Area, to form the basis of decision making until the LDP is adopted in its entirety.
- 2.19 The BMA Tourism Strategy comprises the following elements:-
- Promoting a sustainable approach to tourism development;
  - Protecting a varied range of tourism development opportunities;
  - Facilitating the development of tourism infrastructure; and
  - Enhancing the urban environment generally and, in particular, 'first impression' points at major gateways, and in city and town centres.
- 2.20 The plan classifies the tourism potential into (1) conservation areas, which includes the coastal zone and other conservation areas, such as the Linen, Cathedral and Belfast city centre areas; (2) sensitive areas, such as the Lagan Valley Regional Park

and Belfast Conservation Areas; and (3) opportunity areas, such as the urban remainder and rural settlements.

- 2.21 The BMAP area contains high quality natural heritage of landscape, Lough Shore and wildlife, and a significant man-made heritage of buildings, culture and industrial past. The Belfast Metropolitan Area (BMA) has the capacity to further exploit the international trend towards city and business tourism. Belfast has the potential for growth as a city break destination, conference and business tourism, and evening time economy. Belfast could become as a major destination for cultural tourism facilitated through festivals, museums, theatres, art galleries and event venues, such as the Waterfront Hall, Odyssey SSE Arena; and our history and industrial heritage, which focuses on the city centre, Titanic Quarter, Queens Quarter, Gaeltacht Quarter, Cathedral Quarter and waterfront. Opportunities exist along the Lagan River and Canal to expand water based tourism. Adventure and activity tourism sustainably developed within the Lagan Valley Regional Park, Colin Glen Linear Park, Belfast Hills and Cavehill Country Park, would help to diversity the visitor offer and experiences. BMAP lists access points to Belfast Hills and opportunities for future development.
- 2.22 The Lagan Valley Regional Park is Northern Ireland's first and only Regional Park. It is located between Stranmillis, Belfast and Union locks, in Lisburn. It covers some 4,200 acres of countryside and eleven miles of riverbank. The Regional Park is centred on the River Lagan and towpath. The Lagan Canal, potentially is a major recreational resource, and the reopening to create a regional network of waterways to facilitate water based tourism and recreational traffic between the Lough, rivers and coast is a strategic government objective. The Plan lists Lagan Valley Regional Park Nodes at Lockview Road, Dub Lane, Malone Park, Shaw's Bridge and Lady Dixon Park, where favourable consideration is given to access and recreation amenities such as picnic areas.

## **Council Plans**

### **Belfast Agenda – Community Plan**

- 2.23 The Council took on responsibility for community planning in 2015 as a result of local government reform. It is a process whereby councils, statutory bodies and communities themselves work together in partnership to develop and implement a shared vision for their area, to make sure that public services work together with communities to deliver real improvements for local people. The plan sets out a joint vision and long-term ambitions for Belfast's future, as well as outlining priorities for action over the next four years.
- 2.24 The vision for Belfast in 2035 set out in the Belfast Agenda is:  
*“Belfast will be a city re-imagined and resurgent. A great place to live and work for everyone. Beautiful, well connected and culturally vibrant, it will be a sustainable city shared and loved by all its citizens, free from the legacy of*

*conflict. A compassionate city offering opportunities for everyone. A confident and successful city energising a dynamic and prosperous city region. A magnet for talent and business and admired around the world. A city people dream to visit.”*

- 2.25 Delivery of this vision is based on a number of strategic outcomes, together with four bold ambitions to be achieved by 2035. The LDP is recognised within the Belfast Agenda as one of the key tools available to shape the physical future of Belfast in a sustainable way. The LDP will provide a spatial expression to the community plan, thereby linking public and private sector investment through the land use planning system.
- 2.26 There is a statutory obligation for the evolving Local Development Plan to take account of the Council’s Community Plan, the Belfast Agenda. The Community Plan, approved in 2017, was developed in partnership with key stakeholders, residents and community organisations. It outlines how the Council will work with statutory, business and community partners to shape the future development and growth of the city up to 2035 that is socially and economically inclusive. There are four key priorities in the Community Plan:
- Growing the economy;
  - Living here;
  - City development;
  - Working and learning.
- 2.27 Growing a prosperous, diverse and inclusive economy, and encouraging city development, both recognise the need to support tourism. It recognises that the City has a growing international reputation as a venue for major events, and a leading tourist destination. The Community Plan priority is to grow the tourism, and hospitality sectors to increase tourism spend, to boost the local economy, and create jobs. Three stretch goals for 2021, have been set in the Belfast Agenda for growing the tourism sector:-
- increase the value of out-of-state tourism to £500 million;
  - welcome 1.9 million overnight stays in tourist accommodation per year;
  - to create a minimum of 3,000 new hotel bed spaces.
- 2.28 This is to be achieved through the delivery of the Council’s Integrated Tourism Strategy to maximise the offer of the natural and built heritage; and increase investment in the city to attract leisure and business tourists. The Belfast Agenda is also proposing the delivery of a new city centre world-class visitor attraction. It states that there is clear evidence that the city tourism offer would be transformed by a substantial new attraction in the city centre to complement the existing tourism and cultural offerings such as Titanic Belfast. The Local Development Plan will provide a 15 year planning framework to support the delivery of the economic and social outcomes in the Belfast Agenda.

### **Belfast City Centre Regeneration and Investment Strategy (BCCRIS)**

- 2.29 The Belfast City Centre Regeneration and Investment Strategy (BCCRIS) sets out Belfast City Council's ambition for continued growth and regeneration of the city core to 2030. It contains policies to guide decision making, and key projects to drive economic growth and deliver social benefits.
- 2.30 The Strategy also identified five special action areas within the city centre to include a new transport hub around Great Victoria Street and furthering regeneration in the North West and North East Quarters through anchor developments alongside public realm schemes and social and cultural activities. A key principle of this strategy is to maximise tourism.
- 2.31 The BCCRIS suggests possible projects such as new air connections, possible event/exhibition/festival space, branding and promotion, enhancing festival and activity offering and implementing quick wins, such as Sunday morning openings.

### **The Belfast: Integrated Tourism Strategy 2015-2020**

- 2.32 The Belfast: Integrated Tourism Strategy 2015-2020 (Belfast City Council) sets out strategic themes as follows: reputation management; promoting what the city has to offer; capacity building by strengthening the service and hospitality sectors; and product development by developing new attractions for visitors to see and do. Key action areas include marketing and branding; visitor management; business tourism and tourism events; and key projects, including an international hotel school, quality city centre attraction, urban sports hub, hotel rooms and a maritime visitor experience.

### **Other Departments, Agencies and Organisations Plans**

- 2.33 The Department for Communities (DfC) is the Government Department responsible for arts and creativity, museums, architecture and built environment policy. It has a policy role in influencing cultural tourism in Northern Ireland, and supporting festivals and events. DfC published "Ambitions for the Arts: A Five Year Strategic Plan for the Arts in Northern Ireland 2013-2018", which aims to champion the arts, promote access and create a resilient arts and culture sector.
- 2.34 The Department of Economy (DfE) is the key player in formulating and delivering tourism policy. DfE published the Economy 2030 - a draft industrial strategy for Northern Ireland in 2017. It is promoting an international focus as a key area of economic potential, and actively promoting Northern Ireland as a good place to visit. A new tourism strategy is being proposed to unlock the full potential of tourism, and promote NI as a must-see destination. The strategy will place a clearer focus on the key markets of USA, Canada, Australia, mainland Europe, and Republic of Ireland. The draft industrial strategy aim is to develop an internationally competitive tourism sector, based upon creating an inspiring visitor destination, with an ambitious goal to

double external revenue to £1 billion by 2025. It proposes investing in experiences and products infrastructure that will give external visitors new reasons to visit and stay longer. DfE acts as the host Department for Tourism Northern Ireland (Tourism NI is the trading name of the Northern Ireland Tourist Board-NITB). The Draft Tourism Strategy for Northern Ireland to 2020 proposes increasing visitor numbers and revenue. A new draft Tourism Strategy for Northern Ireland to 2025 is being prepared by DfE, which will provide the priorities, direction and targets for sustainable tourism. The key aim will be to increase visitor numbers and spend to deliver the targets established in the Programme for Government.

- 2.35 The Department of Agriculture Environment and Rural Affairs (DAERA), includes the Forestry Service which manages the Forest Parks, which are a valuable tourism asset. The Forestry Service manages Belvoir Forest Park in Belfast.
- 2.36 There are numerous non-departmental bodies and independents involved in tourism initiatives within the city and wider region. Visit Belfast operates the Welcome Centre, and is responsible for promoting and marketing the city for business conferences, and city leisure breaks. The Northern Ireland Environment Agency (NIEA) is overseeing the protection of monuments, such as the Giants Ring and our built heritage. The National Trust conservation organisation are responsible for assets and areas within Belfast, including Minnowburn, Divis and the Black Mountain, Lisnabreeny, Belmont Tower and the Crown Bar. Visit Belfast, Tourism NI, Tourism Ireland and Discover Northern Ireland are inevitably the first port of call for many visitors to Belfast.

## 3.0 Tourism Profile

### Characteristics and Trends

- 3.1 Tourism is the largest and fastest growing industry in the world, accounting for 10.4% of global gross domestic product<sup>1</sup>. The European Travel Commission has reported growth of 3-4% per annum across the EU28 countries<sup>2</sup>. Belfast tourism has displayed impressive growth, quadrupling visitor trips and tourism spend between 2000 and 2013. The city has become a significant tourist destination, attracting 1,459,760 trips, and £334.1 million spend in Belfast; this accounted for 39 per cent of total tourism spend in NI in 2016<sup>3</sup>. There were 4.7m visits to Belfast visitor attractions in 2016<sup>4</sup>. The Sector supported 18,607 tourism jobs across the Council area, or approximately 8.5% of total employee jobs in 2015<sup>5</sup>.
- 3.2 The DfE Census of Employment 2013 forecasts that, by 2020, accommodation and food services would make up 6.2% of all employment, making it the 5th fastest growing job sector.
- 3.3 Air access is one of the strategic priority areas for economic development and tourism. The maintenance of existing air routes and the introduction of new routes, particularly to mainland Europe and North America, are vital to the NI economy. In 2003, NI had direct access to one European city, in 2015 there were direct flights to 57 destinations, including 29 European destinations. There are 5 direct sea routes to Great Britain. Tourism NI research in 2015 shows that 55% of our overseas visitors come to NI via the Republic<sup>6</sup>.

### Tourists and Visitors

- 3.4 A major focus of the tourism industry is attracting external visitors (resident from outside Northern Ireland). It is estimated that there were 2,658,000 external trips to Northern Ireland in 2017 representing a 3% increase compared to 2016<sup>7</sup>. Domestic visitors accounted for 2,193,000 million trips, an increase of 11% compared to 2016

<sup>1</sup> <https://www.wttc.org/>

<sup>2</sup> Belfast Integrated Tourist Strategy 2015-2020 <http://www.belfastcity.gov.uk/tourism-venues/tourism/tourismstrategy.aspx>

<sup>3</sup> NIRSA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017 <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-all-fact-cards-2014-2016.pdf>

<sup>4</sup> NIRSA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017 <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-all-fact-cards-2014-2016.pdf>

<sup>5</sup> NIRSA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017 <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-all-fact-cards-2014-2016.pdf>

<sup>6</sup> Tourism NI Access into NI Summer 2015 <https://tourismni.com/globalassets/facts-and-figures/research-reports/access-into-ni/air--sea-access-ni-summer-2015.pdf>

<sup>7</sup> NISRA Northern Ireland Annual Tourism Statistics 2017 Published 6 June 2018 <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Annual-Tourism-Statistics-Publication-2017%20.pdf>

and an expenditure of £270m<sup>8</sup>. In 2017 external visitors contributed an estimated £657 million to the NI economy<sup>9</sup>.

3.5 The majority of visitors to the city in 2016 were from Great Britain, and Northern Ireland, with the remaining visitors from mainland Europe, Republic of Ireland/others, and North America. In 2016 the average length of stay was 3 nights and average spend per trip was £229<sup>10</sup>. The main reason for visiting Belfast was for holiday purposes, visiting friends and relatives and then followed by business trips. Belfast LGD has the highest proportion of overnight business trips, overnight trips and highest proportion of European overnight trips of all the LGD's. In 2016 there were 1,459,760 overnight trips, an increase of 7% from 2015<sup>11</sup>.

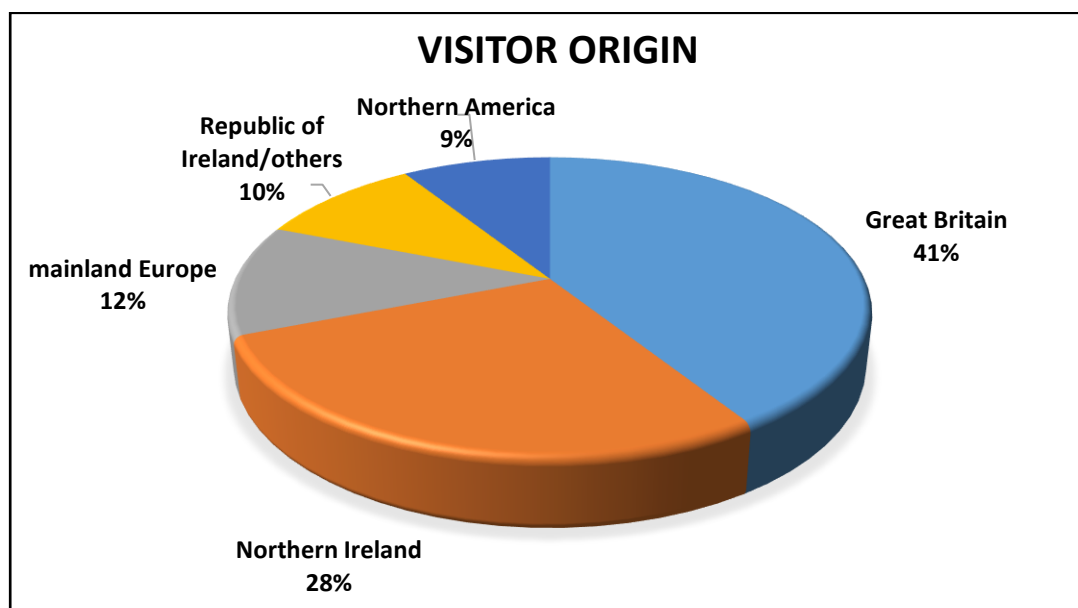


Figure 1: Stated origin of visitors to NI (NISRA 2016)<sup>11</sup>

<sup>8</sup> NISRA Northern Ireland Annual Tourism Statistics 2017 Published 6 June 2018  
<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Annual-Tourism-Statistics-Publication-2017%20.pdf>

<sup>9</sup> NISRA Northern Ireland Annual Tourism Statistics 2017 Published 6 June 2018  
<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Annual-Tourism-Statistics-Publication-2017%20.pdf>

<sup>10</sup> NISRA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017  
<https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-all-fact-cards-2014-2016.pdf>

<sup>11</sup> NISRA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017  
<https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lgd-all-fact-cards-2014-2016.pdf>



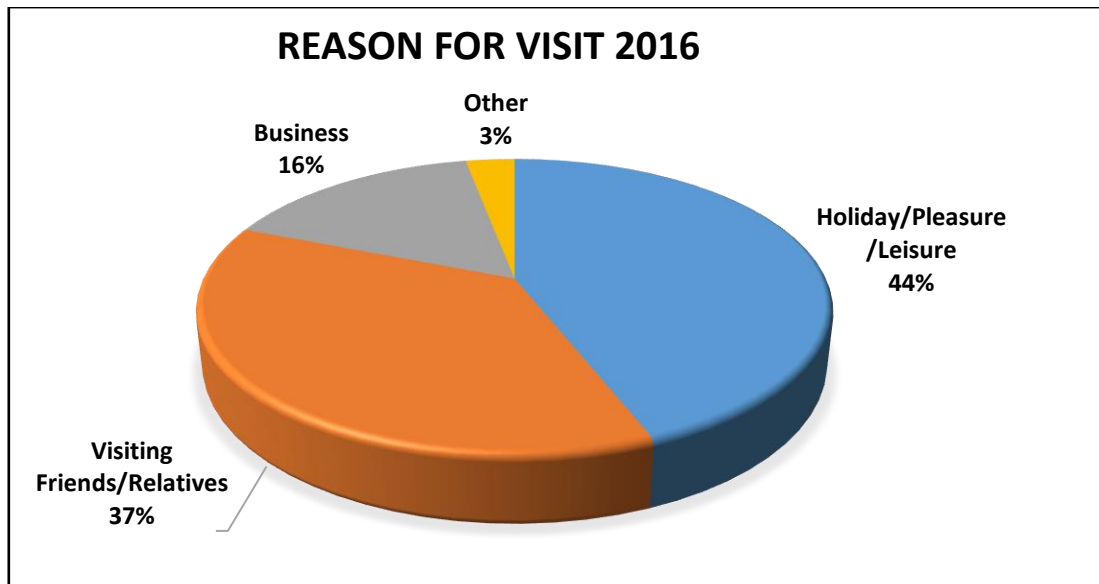


Figure 2: Stated reason for visit to NI (NISRA 2016)<sup>12</sup>

- 3.6 Day trips are described as travel outside normal place of residence or workplace for more than 3 hours and include day visitors from cruise ships. There were 4.7 million visits to visitor attractions in Belfast in 2016. Titanic Belfast was the most popular fee paying attraction in Belfast, followed by the Ulster Museum and W5<sup>12</sup>.

#### Overnight Accommodation

- 3.7 Belfast has 35 hotels with 3,929 rooms available at the end of March 2018<sup>13</sup>. Hotel room occupancy rates have increased from 63% in 2011 to 79% in 2016. In 2017, hotels in Belfast achieved 80% room occupancy<sup>14</sup>, benefitting from increases in business tourism, conferences, cultural events and city breaks. Tourism NI has recognised “demand for hotel accommodation has been growing at a higher rate than supply over recent years. The next few years, however, will see significant capacity growth particularly in Belfast, which already hosts 44% of available rooms”. (Northern Ireland Hotel Performance January – September 2017). Northern Ireland has a high quality hotel offer with 8,068 rooms available in the four - five star classification out of a total of 18,768 hotel rooms. Belfast has 15 out of the 41 four - five star hotels for NI as a whole at the end of March 2018<sup>15</sup>. There are two 5 star hotel ‘The Merchant’ and The Fitzwilliam, and thirteen 4 star hotels.

<sup>12</sup> NISRA Northern Ireland Local Government District Tourism Statistics 2016 Published 6 July 2017 <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/local-government-district-tourism-statistics/lqd-all-fact-cards-2014-2016.pdf>

<sup>13</sup> Tourism NI Accommodation Stock end March 2018 (NISRA) <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/accommodation-stock/accommodation-stock-end-march-2018.pdf>

<sup>14</sup> NISRA Northern Ireland Annual Hotel Occupancy Survey 2017 Published 07 June 2018 <https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Annual-Hotel-Occupancy-Survey-2017.pdf>

<sup>15</sup> Tourism NI Accommodation Stock end March 2018 (NISRA) <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/accommodation-stock/accommodation-stock-end-march-2018.pdf>

- 3.8 The city has 253 self-catering choices of accommodation providing 1,673 bed spaces up to the end of March 2018<sup>16</sup>. Belfast also had 362 rooms within guesthouses/guest accommodation/bed and breakfast<sup>17</sup>, general trends are that stock of these tourist facilities are decreasing. There are also nine hostels<sup>18</sup> within Belfast LGD, including the International Youth Hostel on Donegal Road and Queens University's Elms BT9 campus which offers rooms for visitors during the July–August summer holiday period.
- 3.9 The digital world and the growth of the “sharing economy” are changing how visitors choose to stay in cities. Visitors have a wide choice of accommodation options, however there is a growing trend for short-term-let accommodation offered through sites such as Airbnb, which provides visitors the opportunity to stay in people's homes.
- 3.10 There has been an influx of hotel developments since BMAP was published. This has reflected the growing confidence of Belfast to promote itself as a city tourism destination. The growth in tourism has capitalised on the considerable public and private sector investment to regenerate the city centre over the past twenty years. The creation of Cathedral Quarter as a creative cultural district, and the renewal of the waterfront has attracted a number of new hotels; the local brands such as the Merchant, Ramada Encore and the international brands such as Hilton and Radisson Blu. In recent years with the completion of the Titanic Signature Project, and the Waterfront Hall Extension to provide additional conference exhibition space, there have been further hotel developments completed, Titanic Hotel, Bullitt, and Grand Central. It is estimated that there are potentially 24 hotel developments, including extensions, are proposed for Belfast to deliver an additional c2644 bed rooms (appendix 5).
- 3.11 The Council commissioned a Hotel Sector Market Analysis Report in 2015<sup>19</sup>, which highlighted a shortfall in bed room supply to meet the growing demand from increasing tourist numbers. It concluded that there was a need for a large scale conference hotel c400 bed rooms ideally near the Waterfront Hall and Conference Centre. It also stated there was a limited number and choice of global hotel brands, as well as a need to develop different styles of hotels, which would appeal to a younger age group. The BCCRIS's is promoting the need for additional luxury branded hotels that could attract business travellers and leisure tourists to build Belfast's credibility as a major city destination. There is also a gap in the boutique hotel market that is unique to the Belfast experience. Converting vacant or

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<sup>16</sup> Tourism NI Accommodation Stock end March 2018 (NISRA) <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/accommodation-stock/accommodation-stock-end-march-2018.pdf>

<sup>17</sup> Tourism NI Accommodation Stock end March 2018 (NISRA) <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/accommodation-stock/accommodation-stock-end-march-2018.pdf>

<sup>18</sup> Tourism NI Accommodation Stock end March 2018 (NISRA) <https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/accommodation-stock/accommodation-stock-end-march-2018.pdf>

<sup>19</sup> BCC Hotel Sector Market Analysis Report 2015 - ASM & RHM

underutilised historically significant buildings into hotels with a strong local identity would serve the dual purpose of revitalising existing heritage fabric and providing a uniquely Belfast hotel experience. Belfast Agenda's has established a target is to create a minimum of 3,000 new bed spaces by 2021 as a means to grow the number of overnight accommodation in the city.

### Principal Attractions

- 3.12 Lagan Valley Regional Park, Titanic Belfast and the Ulster Museum were the most popular visitor attractions in 2017. In December 2016, Titanic Belfast was awarded the 'World's Leading Tourist Attraction' at the prestigious World Travel Awards. Some of other principal attractions include W5, Belfast Zoo, and the Belfast Hills. Whilst Belfast offers many cultural, natural, and built heritage attractions in comparison to other UK and European cities, there appears to be demand for another distinctive city centre attraction. The BCCRIS suggests a contemporary visual art's museum, preferably making use of Belfast's built heritage, with other suggestions of a museum of maritime heritage or aquarium. Titanic Belfast's recent success indicates significant scope for another major tourist attraction, and supports the Council's plan to create a second major tourist attraction for the city centre in accordance with the BCCRIS. A feasibility work is underway on the 'Belfast Story' visitor attraction to determine the viability of a potential project. Belfast has a number of community tourism attractions including the new Eastside Visitor Centre in east Belfast and the development of a cultural trail for Fáilte Feirste Thiar Ltd in west Belfast.



Figure 3: Belfast top 10 paying and non-paying visitor attractions in 2017 (NISRA Visitor Attraction Survey 2017)<sup>20</sup>

<sup>20</sup> Northern Ireland Annual Visitor Attraction Survey 2017 Published 07 June 2018

<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Northern-Ireland-Visitor-Attraction-Survey-2017.pdf>

## **Tourism Sectors**

### **Business Tourism**

- 3.13 Business tourism is encouraged by meetings, incentive conferences, exhibitions and trade shows. This sector is a significant contributor to the economy in Northern Ireland, and there are opportunities to expand the sector to attract additional business tourists. Conference tourism represents an important sector of Belfast's tourism economy; providing mid-week, year-round trade for the tourism and hospitality industries, as well as complementing the growing weekend leisure tourism market in the city. Business travellers and conference delegates are typically high-spending visitors that bring trade to a wide range of local businesses. They prefer compact walkable cities with short distances between hotel accommodation and conference venues.
- 3.14 The recently completed extension of the Waterfront Hall to provide an enhanced exhibition and conference facility has the potential to create 1,500 new jobs and deliver £45 million of additional income by 2020<sup>21</sup>. The venue now boasts 7,000m<sup>2</sup> of flexible event space for conferences, exhibitions, business events and entertainment. While the facility has been designed to accommodate any type of event for up to 2,000+ delegates, it also lends itself to smaller events. In 2017 there was a total of 71 conferences, which generated an estimated 79,315 bed nights, and the economic benefit is estimated to be in the region of £34 million. Visit Belfast has achieved future conference wins for the city worth £33million, it is estimated that this will generate 60,000 bed nights over the next 4 years<sup>22</sup>.
- 3.15 Business tourists inevitably require good quality accommodation, and an increasing stock of this is necessary to meet demand. The key attributes that attracts the meetings, incentives, conferences and events / exhibitions (MICE) sector to cities are:-
- An easy accessible destination – compact, walkable cities
  - Memorable experiences
  - Stunning landscapes and scenery

### **Cultural Tourism**

- 3.16 The World Tourism Organisation defines cultural tourism as: "all aspects of tourism that can teach visitors about their past and inheritance, as well as their contemporary lifestyles." Cultural visitors are taking part in cultural activities, visiting: museums; galleries; theatres; music; exhibitions; learning about literature; history; exploring the built environment, in a way that's authentic and providing a memorable experience of the place.

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<sup>21</sup> website <http://www.waterfront.co.uk/organise/why-choose-us/>

<sup>22</sup> BCC City Growth and Regeneration Committee, Visit Belfast – Half Year Performance Report 6 December 2017

- 3.17 Cultural tourism is one of the largest and fastest growing segments within the global tourism marketplace and is being taken increasingly seriously by cities and regions worldwide. It can deliver a rich and memorable experience of the landscape, the heritage, and the art of the place for visitors. Increasingly, today's cultural tourists are looking for more than just the tick box attractions, they are seeking authentic experiences that are memorable, fun, photogenic, to be "Instagram-able" and "brag-able" on social media. To plan and develop cultural tourism, Cities need to identify their distinctive cultural and heritage assets focusing on the quality of the experience. Cultural tourism is about the place, and how the destination defines itself to provide unique experiences for the visitor.
- 3.18 The emphasis in planning for cultural tourism needs to be on the whole offer rather than just a single tourism asset, signature attraction, seasonal festivals, or one-off events. It is important that the wider tourism infrastructure, such as the range of available accommodation, food, drink, and the quality of the public realm, is connected in a coherent way to help create the right visitor experiences. To build a strong tourism economy, the cultural and heritage assets need to be properly connected and accessible to provide a compelling story that present the best the city can offer to the visitor.
- 3.19 There is the potential for the arts and heritage to be a driver for attracting culturally motivated visitors to Belfast. The Grand Opera House, the Lyric Theatre and the MAC hosts home grown and international productions. The city has 35 galleries, 17 theatre companies, 2 concert halls, 15 arts venues and 150 pieces of public art. There are numerous organisations within Belfast representing the cultural scene, and the Council recognises that culture, arts and heritage are key drivers of the city's economy. There is continuing interest in the history of the troubles and black taxi tours are highly popular.
- 3.20 Belfast has a rich heritage of historic buildings, such as the City Hall, Crumlin Road Gaol, Parliament Building, Queen's University, St Anne's Cathedral, and St Malachy's Church, as well as public parks such as Botanic Gardens and Tropical Ravine. Tourist and visitor attractions are expanding, creating clusters, such as the Crumlin Road Gaol, which includes a whiskey distillery, bar and restaurant. The adjacent Courthouse is to be redeveloped for a hotel. The cultural heritage provides authenticity, and a distinctive sense of place. European Heritage Open Day is a successful yearly event in which many of these buildings and spaces are open for visitors. The growth in the cultural tourism sector could provide the potential for the refurbishment of vacant heritage buildings, to develop new hotels, restaurants, performance venues, and enhancing open space provision for new uses. The regeneration of heritage places as creative cultural quarters provide attractive tourist clusters for tourists and local residents alike. An advantage of planning for cultural tourism is that it will have a continual year-round appeal that is not weather dependent for the visitor.

- 3.21 Belfast's music scene is a major attraction for visiting cultural tourists, and is recognised as a distinctive element of Belfast's cultural profile. The city boasts an eclectic mix of music, from classical concerts offered by the Ulster Orchestra in the Ulster Hall and Waterfront Hall, to traditional live music in pubs, to the biggest pop and rock venue, the Odyssey SSE Arena. The city's musical scene receives high international praise, and it is playing a crucial role in revitalising the cultural vibe in the city. There is a vibrant evening economy, with a variety of venues offering performances from local bands, DJs, traditional musicians, orchestras, jazz players and songwriters.
- 3.22 The Council has implemented music tourism initiatives, which has included the Belfast Music iPhone app which allows local music fans and visitors to find out about music events, but also to explore the city's rich musical heritage. The Belfast Music Bus Tour provides a journey through a great rock n' roll city; starting at the Ulster Hall and home to the Ulster Orchestra, the tour takes in many landmarks associated with the Belfast music story, venues, which put the city on the international music map, and places that inspired songs, ending with a tour of the Belfast Music Exhibition at Oh Yeah Music Centre in Cathedral Quarter. There is the Belfast Traditional Music walking Trail around Cathedral Quarter where tourists are treated to a performance of traditional tunes, songs and stories.
- 3.23 The Council has an aspiration to become a United Nations Educational, Scientific and Cultural Organization (UNESCO) "City of Music", to strengthen Belfast's reputation as a culturally vibrant destination. In recognition of Belfast's rich music heritage, and to strengthen long term cultural development, "The City of Music" designation would protect and preserve the city's musical heritage considered to be of outstanding value to humanity. This supports the Belfast Agenda's objective to raise the city's profile and to increase tourism numbers. This is further supported by a wider programme of work as outlined in the Council's Cultural Framework and Action Plan: Delivery Plan 2018/19. Significant music related activity is due to take place throughout 2018 and early 2019, these include:
- BBC Music Events (BBC Big Music Weekend, Radio 2 Folk Awards & Proms)
  - Gradam Ceoil
  - Other Voices
  - Féile an Phobail
  - EastSide Arts Festival
  - UK Pipe Band Championships
  - Belfast Tattoo
- 3.24 The Council is also promoting "Summertime animation" which is a programme of pop-up music events to animate public spaces. This is a seasonal intervention to drive footfall, increase vibrancy of public space, and improve connectivity across the city.

- 3.25 Writers' Square and the John Hewitt bar commemorate Belfast's literary poets and authors, and these are celebrated through readings, festivals and walking tours. Belfast's rich literary heritage has an important role to play in "place-making," and is an important dimension in marketing the city as an international visitor destination. It provides a compelling experience to a special interest and niche cultural tourism market. The Council has promoted the development of the Literary Belfast iPhone app, 'Belfast through Writers' Eyes', with video guides to encourage Tourist to explore the literary city; from the exhibition in the City Hall, the lives commemorated in Writers' Square, and the C.S. Lewis walking trails. The promotion and protection of the city's literary heritage helps to create a distinctive tourist destination for overnight city breaks in a competitive marketplace.
- 3.26 Public art can transform the physical landscape of places and can provide an appreciation of the city's unique character, and heritage. It is used to revitalise public spaces, to improve the environment and enhance new developments. It is also an important creative tool in "place shaping" and defining the urban character of Cities. Public art can often help to create successful tourism products for the local visitors as well as cultural tourists; helping to interpret the history and culture of the destination. It can enhance the tourist experience, especially for those visitors who are curious, open to discovery and exploration. Public art at times can become synonymous with the destination which can indeed help create strong "City tourism brand," such as "Angel of the North" for Newcastle upon Tyne. Belfast has a wealth of public art, such as the iconic "Big Fish", the 'Rise', in the west of the city, which is the tallest sculpture in Ireland, and the CS Lewis sculpture trail. Much of the work that the Council does in the field of public art is intended to increase public awareness of the importance of good design; and the value of a welcoming, distinctive environment. Public art walking trails provide opportunities for the tourist to explore the city, and it will be important to ensure that these routes are well sign posted, safe and environmentally attractive.
- 3.27 The Council also promotes the visual arts in Belfast through bus and walking tours to the various art galleries in the city. The successful "Late Night Art" held on the first Thursday of every month sees up to twenty galleries across Belfast welcome visitors for an evening celebration of visual art. This is an important initiative to support the evening economy in the city.
- 3.28 The Ulster Museum is the city's second most popular visitor attraction in 2017 attracting 533,000 visitors and W5 Science Museum with 323,000 visitors<sup>23</sup>, highlighting the appeal of museums and art galleries. In 2017 the Council invested £1.3 million, to create a new dedicated visitor attraction in the City Hall that charts the history of Belfast.
- 3.29 The resurgence of the Belfast Quarters has taken advantage of promoting the city's cultural heritage, enabling urban regeneration and economic growth in these areas.

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<sup>23</sup> NISRA Northern Ireland Annual Tourism Statistics 2017 Published 07 June 2018  
<https://www.nisra.gov.uk/sites/nisra.gov.uk/files/publications/Annual-Tourism-Statistics-Publication-2017%20.pdf>

The quarters have helped to create tourism clusters within the city, where attractions and complementary facilities and infrastructure are being developed to create lively destinations for visitors.

- The **Cathedral Quarter** is the city's historic quarter with cobbled streets and alleyways. It is the focus of the city centre evening economy, comprising the MAC, hotels, restaurants and bars. There is potential for the Inner North West area, which also has a lively evening economy with night clubs and bars to become a complementary quarter and to extend the city's evening economy.
- The **Gaeltacht Quarter** is the focus of Irish language, music and culture. Many visitors come to see the area's political murals and peace wall separating the Falls and the Shankill. The An Chúlurlann, culture and arts centre, provides a vibrant theatre and gallery space.
- The **Linen Quarter** is the area south of the City Hall, has a rich architectural heritage of the old linen warehouses which house a mix of offices, cafes, bars, night clubs, hotels, and restaurants. It has a lively evening economy focused on the Grand Opera House and Ulster Hall.
- The **Queen's Quarter** with Queen's University Lanyon Building at the heart of this quarter. It has a range of eclectic shops, boutiques, cafes, bars, comedy club, art-house Film Theatre and art galleries, which supports a vibrant evening economy. Botanic Gardens, Lyric Theatre and the Ulster Museum are important tourism attractions in the quarter.
- **Titanic Quarter** has developed as an important maritime tourism cluster, focused on the Titanic Signature Building. The refurbished graving docks, the Nomadic and HMS Caroline exploit the city's maritime heritage. W5 Science museum, multiplex cinema, and the Odyssey SSE Arena providing family entertainment.

3.30 There are emerging tourism clusters fostered through local regeneration initiatives, such as Eastside and C.S. Lewis Square as well as the Crumlin Road Court House and Gaol complex. There are opportunities to encourage complementary tourism development to strengthen the clusters and improve connectivity through the provision of well signed, safe tourist walking and cycling trails or routes.

3.31 Whilst Belfast does have high quality cultural institutions, the Council's Integrated Tourism Strategy 2015-2020, and the Belfast City Centre Regeneration and Investment Strategy, recognises that there is a need for another major city centre tourism attraction or destination of national or international stature. An emerging proposal is "The Belfast Story Attraction" that would create an experience that is authentic and distinctive to Belfast, which would support a confident expression of the city's cultural heritage and future aspirations.



### Food Tourism

- 3.32 Belfast has a diverse offering of restaurants, cafes and pubs. St George's Market, situated in a prominent historic building, is a popular attraction. The market was voted the nation's favourite Heritage project in the 2014 National Lottery Awards. St George's Market has attracted more than 1 million people, including almost 46,500 visitors to the two Twilight Markets, which featured more than 140 local food and craft retailers and 15 local restaurants<sup>24</sup>. In 2017, St George's Market was named the Best Market Attraction by the National Association of British Market Authorities, and the Winter Twilight Market Event was the winner of the VM Christmas Awards. St Georges Market won the Observer Food Monthly Awards for Best Market and the Twilight Market was winner of Tourism NI award for Market Innovation in 2016. The Folktown market within Bank Square has a distinct food and artisanal character. It re-emerged this year following environmental improvements to Banks Square, underlining the importance of a high quality civic space to support an important visitor attraction.
- 3.33 NITB Visitor Attractions Survey 2011/2012 found that 36% of visitors' spend was on food and drink. Belfast's culinary scene has been transformed in recent years. Two city centre restaurants, Deane's Epic and Ox, were recently awarded Michelin stars. The British Airways High Life Magazine listed Belfast as one of the top ten places in the world for food and drink in 2015. Belfast was ranked one of the top places to travel for food in the world by National Geographic in 2016. The city participated in the Northern Ireland 'Year of Food' in 2016, and hosts the annual Belfast Food and Drink Festival.
- 3.34 The local food experience is important for short break visitors. A variety of establishments from fine dining, to pubs contribute to city's food and drink offering. 43% of tourists visited a pub and 45% ate in a pub<sup>25</sup>. It will be important to ensure that a full range of food and drink establishments are provided to offer a choice to the visitor. This would help to support a vibrant evening economy, which can attract a diverse mix of visitors and tourists. Research commissioned by Tourism NI on the Food and Drinks Sector in 2016, indicated that the appearance of the food and drinks establishment matters a lot. Many visitors just 'stumble' across places to eat either through wandering around or simply 'liking the look of a place'. This emphasises the importance of good quality design to improve the physical appearance of restaurants, pubs, and cafes<sup>26</sup>.

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<sup>24</sup> BCC Annual Report 2017

<sup>25</sup> Tourism NI Visitor Attitude Survey By Region – Greater Belfast Destination Fact Cards 2014  
<https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/visitor-experience-surveys/visitor-attitude-surveys/visitor-attitude-by-region-2014---destination-fact-cards/fact-card--greater-belfast-destination-2014.pdf>

<sup>26</sup> Report Food & Drink Survey Tourism Northern Ireland December 2016  
<https://tourismni.com/globalassets/facts-and-figures/research-reports/tourism-performance-statistics/visitor-attitude-surveys/visitor-attitude-survey-focused-on-food-drink-2016.pdf>

### **Screen Tourism**

- 3.35 Screen tourism is a growing trend as evidenced by Game of Thrones, Dracula Untold, The Fall, In the Line of Duty, and Lost City of Z. These productions have helped to showcase the beauty and natural landscape that Northern Ireland has to offer to a worldwide audience, and has created opportunities to develop exciting tourism experiences built around the film locations. The portrayal of a location in a successful film or television drama can attract visitors who want to experience the place where the story happened. The effects for some screen locations have been significant in supporting the Tourism Sector and generating income to boost the local economy. This has been clearly demonstrated where successful films and television series such as The Lord of The Rings based in New Zealand is credited as playing a significant part in the 40% rise in average annual visitor numbers<sup>27</sup>, and Last of the Summer Wine location in Holmfirth, West Yorkshire. The success of the Disney animated film Frozen reportedly led to a 37% increase in US visitors to Norway in the first three months of 2014<sup>28</sup>.
- 3.36 Game of Thrones distributed internationally has attracted overseas visitors to Belfast and the wider region. The Game of Thrones Exhibition held in Belfast in 2013 attracted 18,000 visitors in ten days, of which 5,400 visitors were from outside of Northern Ireland<sup>29</sup> Screen NI and HBO, developed a Game of Thrones Northern Ireland locations app, where the visitor can experience the mythical worlds of Westeros and Essos, and the real Northern Ireland film locations. The success of Game of Thrones has generated spin offs such as the Ulster Museum's Game of Thrones Tapestry, and Game of Thrones bus tours, which have attracted screen tourists to Belfast.
- 3.37 The ongoing development of Belfast as a film-making hub, with Titanic Film Studios and the Belfast Harbour Studios underlies the city's potential to attract international productions. This development has been transformative for Belfast as a screen tourism destination. Screen tourism attracts all types of tourists, both domestic and international, who are increasingly seeking authentic experiences that can be obtained from exploring film and television drama locations. It provides the opportunity for the city to showcase its unique heritage, natural landscape, and culture, to screen tourists who would not have considered visiting Belfast and the Region without its screen connections.

### **Adventure and Activity Tourism**

- 3.38 Adventure and activities are a key part of the tourist experience. The main tourist activities include walking, cycling, outdoor adventure activities, golf, fishing, water

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<sup>27</sup> British Film The Economic Impact of the UK Film Industry Institute Oxford Economic September 2012 page 67 <https://www.bfi.org.uk/sites/bfi.org.uk/files/downloads/bfi-economic-impact-of-the-uk-film-industry-2012-09-17.pdf>

<sup>27</sup> Disney makes Norway a hot destination. The Times, 2nd June 2014 <https://www.thetimes.co.uk/article/disney-makes-norway-a-hot-destination-nkmv7p09pbf>

<sup>28</sup> Disney makes Norway a hot destination. The Times, 2nd June 2014 <https://www.thetimes.co.uk/article/disney-makes-norway-a-hot-destination-nkmv7p09pbf>

<sup>29</sup> BFI website <http://www.bfi.org.uk/education-research/film-industry-statistics-reports/reports/uk-film-economy/economic-contribution-uks-film-sectors> Economic Contribution of the UK's Screen Sectors 2015).

sports and equestrian activities. Some of these activities are typically free to access, such as walking and cycling, which makes up the majority of this market. Activities are a key draw in their own right for visitors, and there are economic and social benefits for supporting this tourism sector through the provision of appropriate facilities and infrastructure.

- 3.39 Adventure and activity tourism is a diverse sector divided into small niche areas, yet as a whole it represents an organised yet independent avenue for tourists to experience their holiday destination. The trend towards experience over materialism sees tourists wishing to seek adventure and activity that is fun and memorable. Also there is an emerging trend for tourists wanting to improve wellbeing and fitness to combat the stresses of modern life.
- 3.40 Active tourists generally select their choice of destination based on their proposed activity. The active tourist is focussed on their proposed sporting activity, and are looking for an intrinsic quality of experience in their chosen sport. They are motivated by the ease of access to the activities, the level of physical challenge, the quality of the facilities and infrastructure provided. Families are also likely to seek activity or adventure holidays to keep children active and entertained. They are seeking safe accessible facilities and infrastructure, which can offer activities that can be undertaken by the family as a whole, catering for different ages and competences amongst family members. The overall adventure and activities tourism is mainly driven by the domestic market. The economic value from the adventure and activities market is derived mainly from expenditure on accommodation, food, and drink.
- 3.41 Walking and hiking is a popular free activity across all age groups, but younger walkers are more adventurous. 18% of visitors to the Greater Belfast Area participated in walking or hiking<sup>30</sup>. This is borne out by the popularity of the Tow Path in the Lagan Valley Regional Park, which is the top free visitor attraction in the Greater Belfast Area. There are a number of walking trails providing a variety of routes in Parks, Forest Parks Country Parks and the Belfast Hills in the Plan Area. (Appendices 1 & 4). There are five eco-trails for young people; Cave Hill Country Park, Ormeau Park, Clement Wilson Park, Sir Thomas and Lady Dixon Park and Victoria Park, providing the opportunity to learn about their local, natural and built environment and have fun at the same time<sup>31</sup>. A new one mile heritage trail funded by the Big Lottery Great Places Scheme is being developed from the city centre to the Crumlin Road to showcase the city's oldest built heritage<sup>32</sup>. Within the urban area there are a variety of guided and self-guided walking tours around the city centre. These are based on different themes; history, architecture, art, music, food, pub trail, murder mystery and treasure trails.
- 3.42 Cycle tourism is growing in popularity in the UK, in parallel with renewed interest in personal wellbeing and fitness. It is an environmentally sustainable form of tourism

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<sup>30</sup> Tourism NI Visitor Attitude Survey By Region – Greater Belfast Destination Fact Cards 2014

<sup>31</sup> <http://www.belfastcity.gov.uk/leisure/outdoorleisurefacilities/walking.aspx>

<sup>32</sup> <https://www.greatplacescheme.org.uk/northern-ireland>

with minimal impact on the environment and host communities. The European Parliament estimates that recreational and tourism cycling is worth £36 billion per annum to the EU economy<sup>33</sup>. Cycling tourism is defined as any cycling activity undertaken whilst on holiday or when away from home on day-trips.

- 3.43 Popular European tourist destinations such as Amsterdam, Barcelona, Copenhagen, Dublin, Hamburg, London, Palma and Paris, have introduced bicycle sharing schemes, which encourage visitors to cycle while staying in their cities. The city centre Belfast Bike Scheme is popular with visitors. This has helped the development of themed cycling tours around the city. The Comber and Connswater Greenways are popular, because they provide safe routes that are vital for attracting the family market, which will often include inexperienced cyclists and/or young children. Belfast has a section of the National Cycle Network along Belfast Lough and the River Lagan routed through the city centre, linking into the Lagan Valley Regional Park and Titanic Quarter, which is popular with cyclists. It has the benefit of providing the opportunity for visitors to experience both the built heritage and natural environment that the Plan Area has to offer.
- 3.44 Research by the Adventure Travel Trade Association (ATTA) conducted in early 2018, is predicting an increase in sustainable walking and cycling trail tourism<sup>34</sup>. It noted destinations are actively marketing trails to encourage tourists to increase the length of stay in the place. Walking and cycling trail tourism has many benefits for destinations, as it promotes low impact sustainable tourism and supports the investment in safe routes that are attractive to tourist, as well as for the local communities. For tourists, a trail holiday allows them to spend a lot of time practicing a favourite sport, whether walking, or cycling. There is a sense of accomplishment in completing a trail, which aligns with the motivations around mental well-being and improved health benefits, which trail tourism typically delivers.
- 3.45 Northern Ireland is a popular golf destination due to the global successes of our local golfers. The value to the NI economy was estimated to be £33 million in 2014<sup>35</sup>. The golf tourist tend to be high spending visitors, and research indicated that for every £1 spent on green fees, a further £4 is spent elsewhere in the economy<sup>36</sup>. Tourism NI strategic objective is to market Northern Ireland's success in golf; to increase Golf Tourism and generate additional economic value to the tourism economy. There are approximately ten golf courses within the Belfast Plan Area including Balmoral, Belvoir, Cliftonville, Colin Park, Dunmurray, Fortwilliam, Knock, Malone, Ormeau, and Shandon Park.

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<sup>33</sup> European Parliament (2012) The European Cycle Route Network Eurovelo [online] available from: <http://nia1.me/1yj>

<sup>34</sup> ATTA Research, Trends early 2018 <https://cdn1.adventuretravel.biz/research/2018-Travel-Trends.pdf> page 26

<sup>35</sup> Tourism NI A Strategic Review of Golf Tourism in Northern Ireland 2015 – 2020 <https://tourismni.com/globalassets/grow-your-business/a-strategic-review-of-golf-tourism-in-northern-ireland-2015-2020.pdf>

<sup>36</sup> Tourism NI A Strategic Review of Golf Tourism in Northern Ireland 2015 – 2020 <https://tourismni.com/globalassets/grow-your-business/a-strategic-review-of-golf-tourism-in-northern-ireland-2015-2020.pdf>

- 3.46 The River Lagan provides opportunities for water based tourism activity such as boat trips, angling, kayaking, and canoeing activity. The Lagan Navigation Trust objective is to re-open the Lagan Navigation from Belfast Harbour to Lough Neagh. This would have the potential to link into the Ulster Canal, Lough Erne and Shannon Waterways. The Lagan Navigation Trust proposal to restore the canal infrastructure would have the benefits of creating a valuable tourism asset for NI. The Lagan Navigation Trust states that, if the waterways are reinstated, there are employment and business opportunities for boat owners and operators, overnight visitors and riverside cafes and restaurants (Appendices 2&3). The Council's Lagan Gateway proposal for a lock at the Stranmillis Weir to provide access for boats to the upper section of the River Lagan is under construction (2018). The Third Lock has been partially restored beside the Lock Keeper's, which is a popular attraction with tourists and visitors.
- 3.47 The River Lagan is a well-established resource for canoeing, and there is an activity hub comprising of canoe slalom and water polo based at Shaw's Bridge. The Titanic Boat Company based at Donegall Quay provides trips within Belfast harbour, which is popular with Tourists. It provides the visitors an opportunity to view Titanic Quarter from the water, and Belfast's largest breeding seal colony in Musgrave Channel. The Belfast Harbour Marina is located in Titanic Quarter's Abercorn Basin, is within a 10 minute walk of the city centre. It provides leisure craft berthing facilities for 45 vessels. However the River Lagan is an under used resource, particularly within the city centre; there are opportunities for floating restaurants, floating hotels and water taxis that could help animate the waterfront.
- 3.48 There are several good fly fishery stretches for salmon and brown trout on the one kilometer stretch of the River Lagan between the Red Bridge and Shaw's Bridge. Anglers can also fish downstream from Red bridge as far as the Queen's Bridge and upstream of Shaw's Bridge from the towpath on the West bank. This section is mainly a coarse fishery comprising pike, roach, perch, bream and gudgeon.
- 3.49 Barnett Demesne in south Belfast is home to the city's first mountain bike trails and the only official dirt jump park in Ireland. The Barnett Demesne Trails consist of a shared use 3.4km green trail and an 3.9km blue trail with 3 red loop options (1.5km). The trails start from the Mary Peters Track in South Belfast. The city also provides opportunities for orienteering an outdoor adventure sport which involves walking or running. There are permanent orienteering trails suitable for all ages in Ormeau Park, Sir Thomas and Lady Dixon Park, Barnett Demesne, Clement Wilson and Cave Hill Country Park. The city centre Skateboard Park in Corporation Street is attractive to young people. SKYTrek an Aerial Adventure Park is based in Colin Glen Forest Park. It includes high and low ropes course, climbing wall, zip lines & freefall jump. We are Vertigo is a popular activity centre, offering indoor skydiving in Titanic Quarter. The Lost City Adventure Golf at Cityside Retail and Leisure Park, is popular with families, stag and hen parties.
- 3.50 Sports tourism is encouraged by our successes in football, gaelic football and rugby. Belfast has two new sports stadiums Kingspan Rugby Stadium and Windsor Park

Football Stadium. A new Gaelic Football Stadium is currently being considered for Casement Park. Belfast has benefited from the footballing success of the late George Best, with sports fans visiting the city to see where he grew up.

- 3.51 Belfast has the potential for further adventure and activity tourism such as the T13 urban sports centre in Titanic Quarter. The Council's Integrated Tourism Strategy seeks to promote and create an urban sports hub to attract tourists to Belfast.

### **Events and Festivals**

- 3.52 Events and festivals provide an opportunity to attract additional visitors and revenue for the city. Hosting events and festivals can create a positive image nationally and internationally, which contributes to enhancing civic pride. Belfast has hosted several big festivals and events, including the MTV European Music Awards, Tall Ships, Giro D'Italia, and Gran Fondo, which have generated national and international media impact and attracted many tourists to the city. In 2011 the MTV European Music Awards held in Belfast generated £10 million to the local economy and had international media exposure.

- 3.53 There were 200 annual festivals and events supported by the Council in 2016 - 2017, such as the Christmas Market, Ulster Bank Festival, Belsonic and Tenants' Vital music events, Lord Mayors Show, St Patricks Day Parade and Culture Night. The Belsonic music concerts attracted 40,000 people. The Council's 2016 – 2017 City Events programme generated in excess of £8 million in additional economic activity for Belfast and attracted almost 330,000 visitors to a series of high profile public events<sup>37</sup>.

- 3.54 Recent independent research undertaken for the Council in 2017, indicated that Belfast has a strong reputation for organising, managing and delivering very successful events and festivals, however it is not currently recognised, nationally or internationally, as an events and festivals destination. The Council's draft Events and Festivals Strategy 2018-2023 outlines the Council's ambition to sell the city as an events and festival destination, to increase visitor numbers and revenue. This is to support the Belfast Agenda's aim to increase tourism numbers.

### **Cruise Tourism**

- 3.55 Belfast has seen the growth in the number of cruise ships visiting the city in recent years. In 2017, 93 cruise ships with 110,411 passengers docked in Belfast<sup>38</sup>. 117 ships are expected to dock in Belfast Harbour, bringing more than 200,000 visitors in 2018<sup>39</sup>. This is a 25% increase in numbers compared to 2017, which is due to eight new Cruise Lines adding Belfast to their itineraries. The profile of the cruise lines choosing to visit Belfast ranges from boutique vessels as well as large operators such as Princess, Celebrity, Cunard and TUI. More than half of the cruise ships visiting the city will each bring over 1,000 visitors to Belfast. August 2018 is the

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<sup>37</sup> BCC Annual Report 2017

<sup>38</sup> <https://www.nisra.gov.uk/publications/tourism-statistics-early-indicators>

<sup>39</sup> BHC website 2 March 2018 <https://www.belfast-harbour.co.uk/news/2018-cruise-196/>



busiest month with 26 cruise ships bringing over 40,000 passengers and crew. The cruise season extends from mid-March to mid-October. By the end of 2018 Belfast Harbour will have berthed over 700 ships and 1.2 million cruise visitors since the first cruise ships visited the Port in 1996<sup>40</sup>. The Harbour Commissioners has a plan to construct a cruise dock terminal to facilitate the ever growing number of visitors arriving via Belfast seaport. This would help to improve first impressions of visitor arriving by sea. It will be crucial to ensure that there are good public transport links, as well as high quality walking and cycling connections to the city centre and key visitor attractions.

## **Tourism Infrastructure & Support**

### **Transport and Accessibility**

- 3.56 The proximity of the George Best City Airport to the city centre is an advantage which the Belfast City Centre Regeneration and Investment Strategy (BCCRIS) states could be exploited by further European and international flights. Although the city is well connected through road, rail, sea and air links there are opportunities to improve physical connectivity and arrival points. Whilst Belfast has sea links to Scotland, Wales and England, the cost of ferries can be relatively expensive.
- 3.57 Short stay coach parking for day trip visitor is provided in Donegall Square West adjacent to the City Hall. However this is considered inadequate, as it only provides spaces for four to five tour buses. There is a requirement to provide additional short stay parking spaces for tour buses in the city centre. Currently there is no provision for overnight coach parking in the city centre, to enable bus tour visitors to stay in in the city centre and support the evening economy. With the increase in the number of hotels being developed in the city centre, the provision of tour bus lay-bys to pick up or drop off tourist is considered inadequate as a number of hotels have no dedicated lay by for tour buses.
- 3.58 Whilst there are existing tourist trails and walking tours, connections could be enhanced between principal attractions. In particular, safe walking and cycling routes that are well sign posted, from overnight accommodations to conference facilities, attractions, venues, and to food and drink establishments that would help to promote sustainable tourism.

### **Training and Labour**

- 3.59 Given the proposed growth of the tourism and hospitality sector, this will require the availability of more people with the requisite skills, requiring investment in employability initiatives. This is a key element of the Council's plan to achieve inclusive growth. The Belfast Integrated Tourism Strategy highlights the potential for furthering capacity building. It is suggested that an international hotel school is developed, training in tourism and hospitality is reviewed and that opportunities are encouraged for entry into the hospitality sector.

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<sup>40</sup> BHC website 2 March 2018 <https://www.belfast-harbour.co.uk/news/2018-cruise-196/>

### **Services**

- 3.60 Service and hospitality standards within the city are highly rated by visitors. Belfast is the regional centre for shopping and commerce with the largest commercial floor space in Northern Ireland. The city comprises a retail core with long established nationals, multi-nationals and independents represented and shopping complexes within Victoria Square, Castlecourt, and Great Northern Mall. However there is notable vacancy within the city centre and opportunities exist for further department stores offering luxury or higher end goods to compete with comparable cities in GB. There is a notable presence of banks and services such as hairdressers, dry-cleaners and convenience stores.

### **Marketing and Promotion**

- 3.61 The Belfast Integrated Tourist Strategy aims to improve the reputation of the city through marketing activity, to address any perceptions or images of political unrest. Promoting what the Belfast brand has to offer creates interest and is welcoming to visitors. The city has a banner project providing these within different quarters or decorative lights to celebrate Christmas. Marketing campaigns by the Council, Tourism Ireland, NITB and Visit Belfast aims to attract more visitors. Visit Belfast marketing activity is based on 'Find Your Belfast' where the campaign invites people to discover the city for themselves. Find Your Unique Belfast Summer Campaign 2017 showcased the unique products Belfast has to offer from the World's Leading Tourist Attraction, Titanic Belfast to Ireland's biggest community festival and summer school, Féile an Phobail. 'Find Your Belfast this Christmas Campaign 2017 was promoted across Northern Ireland and the Republic of Ireland to encourage visitors to do their Christmas shopping in the city.
- 3.62 Marketing increasingly focuses on the 18-35 age bracket, the 'Millennials', 'young at heart' and 'culture seekers'. The Tourist Information Centre – Visit Belfast, has a prominent position in Donegall Square North, opposite the City Hall and has a strong online presence via the Visit Belfast website<sup>41</sup>. The impact of technology on visitors from social media, digital marketing and booking and review sites have a wide reach and can have a positive or negative impact on particular destinations. Mobile technology has an important role allowing travellers to tailor holidays to their needs by providing advice and interpretation. Future innovations could allow for signage to be interpreted into different languages or discover the location of the nearest train station with Belfast city's free WIFI.
- 3.63 The Council's 'Place Positioning' supports the ambitions of the city, to improve standards, support economic growth, and increase civic pride. This promotion and championing of the city through 'on the road' events in target cities and marketing strategies and communications with stakeholders and partner organisations will aid to influence projects and Council priorities.

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<sup>41</sup> <https://visitbelfast.com>



**Outlook**

- 3.64 Belfast Integrated Tourism Strategy lists drivers for city tourism derived from research from the UN World Tourism Organisation, to include the city as a holiday destination; dominance of young markets; importance of business tourism; the importance of experiences, digital media, and activities that aid understanding of history and culture; world citizenship; urban activities and adventure tourism; signature festivals and events; local narratives and innovation and creativity.
- 3.65 The investment to increase the local hotels provision demonstrates that investors are optimistic that Belfast is an attractive city break destination for tourists to visit. The success of attractions and experiences based around Titanic Belfast and Game of Thrones is demonstrated by their ability to increase tourism numbers. This success can be built upon through the emerging plans for a new city centre attraction such as the Belfast Story, and upcoming events that can help bring in more visitors the city.
- 3.66 Brexit is creating uncertainties which will depend on future policies to mitigate its impact, and the extent of interconnections, and the continuation of the Common Travel Area between the Republic of Ireland, EU and Great Britain to promote the ease of free movement for visitors. The expansion of the tourism sector is likely to be impacted by the potential withdrawal of the significant sources of EU funds that were previously available for infrastructure and regeneration projects. The recent growth in the tourism industry has relied on labour from within the EU, which may be impacted by Brexit. There is the need to train more local people with the requisite skills, to support the proposed growth of the tourist industry. The Council, in partnership with neighbouring Councils are seeking to mitigate the potential effects of Brexit with the preparation of a Belfast City Region Deal proposition to the UK Government to secure funding for a range of key initiatives. The growth of the Tourism Sector is one of the key priorities in the proposed City Region Deal, which has identified the need to invest in new visitor attractions, infrastructure and skills training.

## 4.0 Draft Plan Strategy Approaches

- 4.1 The Technical Supplement paper highlights the importance of tourism for the local economy and existing employment opportunities. Belfast's unique natural assets of the Lagan Valley Regional Park, Hills and Lough; its built heritage and man-made attractions; its distinctive cultural scene and its prime location as the regional transport hub for sea and air are critical elements for building and maintaining a strong resilient tourism sector. Tourism will have an important role in contributing to the Council's economic growth strategy to create additional jobs. The Council's integrated Tourism Strategy also highlights the real potential for growth to build a critical mass of activity, to increase the economic value of the visitor economy. By strengthening the tourism offer, the city can ensure it has the capacity to compete for visitors and tourism growth.
- 4.2 There are potential opportunities, such as facilitating the protection of existing principle attractions; and the delivery of new visitor attractions, ensuring a supply of a variety of cultural, recreational and leisure activities for a diverse mix of visitors. The growth and diversity of overnight accommodation required to attract more visitors who will have different needs and budgets. Also to recognise the importance of developing and strengthening the evening economy to extend visitor stay in the city that will generate additional expenditure to support the local economy.
- 4.3 Below is a summary of the key findings that will help to inform the Tourism policy in the draft Plan Strategy.

### **Summary of key findings and policy informants**

- **Belfast city centre is the foremost tourist destination in NI**
- **Potential for significant growth, revenue and employment generated in tourism**
- **Titanic Belfast – Internationally award-winning visitor attraction**
- **Significant business tourism**
- **Increasing demand for hotels**
- **Necessity for additional attractions or principal attraction in the city centre**
- **Tourist seeking experience and authenticity, derived from the unique sense of place that is different from other city destinations.**
- **Necessity to support the growth in culture, screen, cruise, food, adventure and other specialist tourism.**
- **Necessity to meet and support the demand for safe attractive walking and cycling trails to encourage longer stays.**
- **Potential to develop and support the evening economy.**
- **To encourage and support the development of tourism clusters to secure the regeneration of the city centre and neighbourhoods.**

- 4.4 However there are a number of issues that have been identified that will need to be considered in the various draft Plan Strategy policies to strengthen the city attractiveness as a tourist destination, to deliver the outcomes defined in the draft Programme for Government and the Council's Belfast Agenda.

**Summary of key issues to be addressed in the draft Plan Strategy to enhance the city's attractiveness as a tourist destination**

- **Limited leisure and entertainment offering has impacted on the city centre's evening economy**
- **Protect leisure and entertainment venues from new city centre residential development to enhance the evening economy and cultural tourism.**
- **Need to provide additional hotel bed spaces, particularly to serve business tourists within walking distance of the Waterfront Conference Venue.**
- **Potential to convert vacant or underused historical buildings to provide unique boutique style hotel experience**
- **Potential for additional distinctive destination attraction, such as the 'Belfast Story'**
- **Potential for hospitality/catering school to increase training in service industry**
- **Need to facilitate a range of leisure, sports and recreational uses to support adventure and activity tourism.**
- **Potential of improved signage and wayfinding.**
- **Necessity to protect unique built and industrial heritage as tourism assets to fulfil demand for experiences.**
- **Opportunity to animate the River Lagan with waterborne activity.**
- **Opportunity to protect and promote the quarters as distinctive tourism clusters.**
- **Necessity to improve transport links, gateways and green linkages into the city centre.**
- **Necessity to develop and enhance safe walking and cycling trails to encourage sustainable tourism.**
- **Necessity to connect open spaces within the city centre and beyond through the delivery of a blue and green infrastructure network to provide enhanced tourism trails.**
- **Necessity for public realm to be improved and encouraged particularly along waterfront and provision of open spaces in the city.**

- 4.5 The preparation of the draft Plan Strategy provides the opportunity to consider possible tourism policies that would help to support the Council's ambitions to grow the city's tourism sector.

**Supporting new Tourism Development**

- 4.6 Policy support for the provision of new high quality tourism, leisure and cultural development that are easily accessible for tourist and visitors would help facilitate the

growth of the sector. There is an opportunity to create or strengthen existing tourism leisure, and cultural clusters with complementary and supporting uses in suitable locations within the city that would ensure sustainability. This would help to provide a diverse range of tourism leisure and cultural experiences that have wide appeal to different groups of tourists. Likewise it would help to provide a mix of activities and facilities suitable for day and evening uses to encourage tourist to stay longer in the city. This would accord with the Council's Integrated Tourism Strategy vision for strengthening the city's tourism industry, to develop a critical mass of activity to attract visitors all year round. This would have the advantage of enhancing the vitality of the city that would help to create an attractive destination, so that Belfast would be able to compete with other European cities.

### Existing Tourism Assets

- 4.7 Belfast has a variety of existing tourism leisure and cultural assets, where potential policy support is required to maintain and protect the assets from new development, particularly if it results in the loss or is detrimental to the existing assets. They are important assets as they offer the variety of experiences to attract a diverse mix of tourist; and provide local employment opportunities.

### Overnight Accommodation

- 4.8 Improving the supply of overnight accommodation is vital for encouraging visitors to stay longer in Belfast, to experience its visitor attractions and business offer. Policy support is required to facilitate the development of a variety of overnight accommodation to ensure that the Belfast Agenda's target to secure a minimum of 3,000 additional bed spaces by 2021 is delivered. There have been seven new hotels opened in 2018 providing 1,158 bed rooms. It is estimated that there are potentially 24 hotel developments including extensions are proposed for Belfast to deliver 2,644 bed rooms (appendix 5).

<b>New Hotels completed 2018</b>	<b>No of Bedrooms</b>
AC Hotel by Marriott	188
Grand Central	300
Hampton by Hilton	178
Maldron	237
Titanic Hotel	119
Easy	81
The Flint	55
<b>Total no of beds</b>	<b>1158</b>

Figure 4: New hotel completed 2018

- 4.9 This would support the hospitality sector in the city centre, as higher levels of overnight visitor expenditure contributes more to the city's economy. This would support the growth of the evening economy to create a vibrant city centre. Overnight accommodation outside of the city centre could be encouraged within tourism clusters to support existing visitor attractions, leisure and cultural facilities. It would

have the benefit of enabling good public transport links and connectivity to promote sustainable tourism. Good quality design would be supported, to enhance Belfast as an attractive destination. It will be important to ensure that there is adequate servicing to minimise conflicts with adjacent land uses.

### Evening Economy

- 4.9 A thriving evening and night time economy is important for building a successful regional city. It has an important economic role in contributing to the development of an exciting cultural tourism destination. It is important to support the evening and night time cultural – leisure activity to grow the cultural tourism sector, and encourage increased tourism expenditure to secure the Belfast Agenda Targets. Belfast has a rich cultural offer, which contributes to a well-established vibrant evening and night time economy. Belfast’s evening and night time economy is mainly focused in the City Centre and within Clusters across the city. Making Belfast’s evening and night-time culture more enjoyable and inclusive requires ensuring a wider range of evening and night-time activities are on offer to the City’s diverse population and visitors. Policy support is required to balance the needs of local residents, and businesses, with protecting the economic benefits of promoting a vibrant evening and night-time economy. Sustaining and protecting noise generating evening and night time cultural venues requires a sensitive approach to managing change in the surrounding area. The Agent of Change principle places the responsibility for mitigating the impact of noise firmly on the new development is being adopted as a means of protecting venues that make a vital contribution to the evening economy.

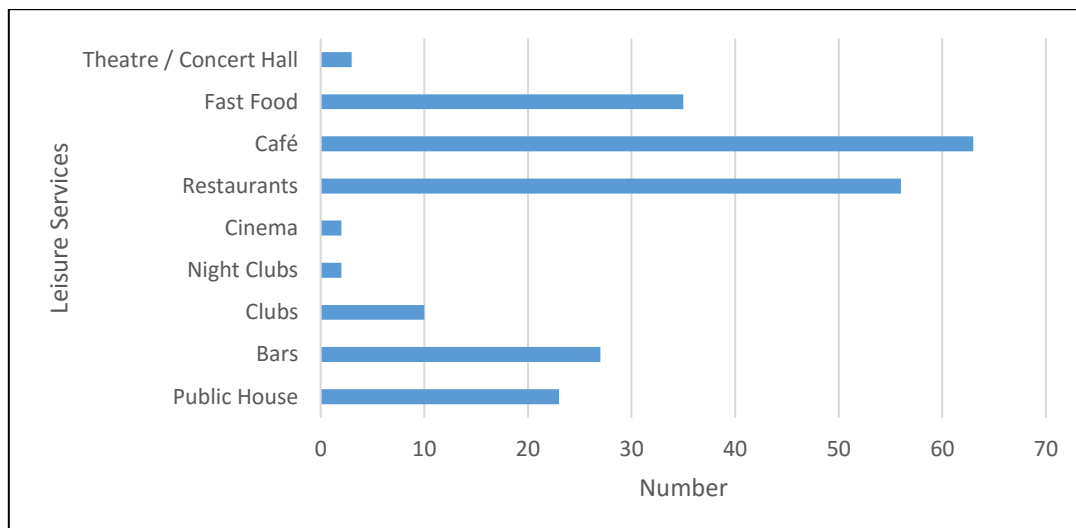


Figure 5: City Centre Leisure Services 2016. Source Belfast Retail and Leisure Capacity Study, Braniff Associates Sept 2017

- 4.10 Land use planning can ensure that there are development opportunity sites and adequate land zoned for mixed use and a quality environment that promotes accessibility, whilst protecting the city’s cultural and leisure assets. These are a critical component in supporting the growth of the evening economy, to deliver the targets established in the Programme for Government and the Belfast Agenda to increase out of state visitors’ expenditure.

Appendix 1: Belfast Hills Partnership

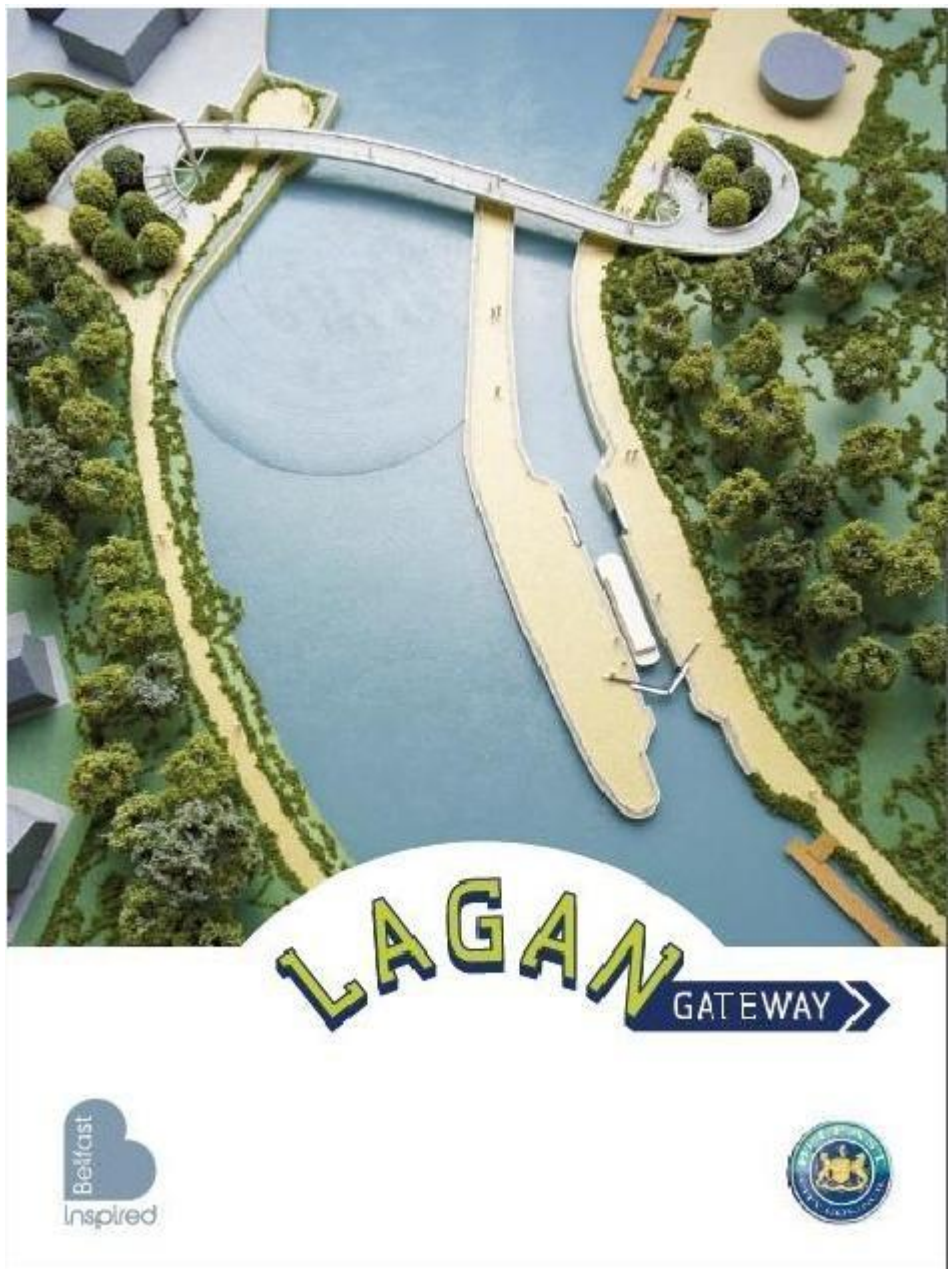




### Appendix 2: Lagan Canal Trust



**Appendix 3: Lagan Canal Trust – Stranmillis Weir**





## Appendix 4: Belfast Walking Trails (BCC)

	<b>Belfast Walking Trails</b>
<b>1</b>	Barnett Demesne
<b>2</b>	Belfast Castle Estate
<b>3</b>	Belfast Lough – Sustrans
<b>4</b>	Bog Meadows
<b>5</b>	Botanic Gardens
<b>6</b>	Cave Hill Country Park
<b>7</b>	Clement Wilson
<b>8</b>	Collin Glen & Gruffalo Trail
<b>9</b>	Connswater Greenway
<b>10</b>	Comber Greenway
<b>11</b>	Cregagh Glen & Lisnabreeny
<b>12</b>	Divis Trail
<b>13</b>	Falls Park
<b>14</b>	Lagan Meadow
<b>15</b>	Lagan Tow Path
<b>16</b>	Minnowburn & Giant's Ring
<b>17</b>	Ormeau Park
<b>18</b>	Sir Thomas & Lady Dixon Park
<b>19</b>	Stormont Woodland Walks
<b>20</b>	Victoria Park
<b>21</b>	Waterworks

## Appendix 5: Proposed Hotel Development Pipeline

	<b>Hotels under Construction</b>	<b>Address</b>	<b>No of Beds</b>
1	George Best Hotel	Bedford Street	78
2	Bank Square	36-42 Bank Street	17
	<b>Planning Permission Granted</b>		
3	Holiday Inn Express Belfast Extension	106 University Street	60
4	Jurys Inn Belfast Extension	9-12 Grosvenor Road	801781
5	Novotel Hotel	108-110 Great Victoria Street	173
6	Odyssey Plaza (2 Hotels)	Sydenham Road Titanic Quarter	c420
7	Queen Street	6-8 Queen Street	122
8	Sirocco Quays	Short Strand	100
9	Hamilton Dock	Titanic Quarter	244
10	Plater's Yard (2 Hotels)	Titanic Quarter	275
11	Wellington Park Hotel Extension	Malone Road	92
12	Fitzwilliam Extension	Great Victoria Street	30
13	Malone Lodge Extension	68-72 Eglantine Avenue	27
14	Bullitt Extension	40a Church Lane	40
15	Donegall Street	11-17 Donegall Street Cathedral Quarter	40
	<b>Planning Application Submitted</b>		
16	The Waring	9-13 Waring Street	43
17	Corporation Street	Corporation Street	250
18	Crowne Plaza Belfast extension	Shaws Bridge	32
19	Crumlin Road Court House	Crumlin Road	71
20	Royal Exchange	Cathedral Quarter	140
	<b>Pre Planning</b>		
21	Kings Hall site	Lisburn Road	160
22	Bank of Ireland	Royal Avenue / North Street	150

Source Planning NI Portal Planning Applications



## Belfast Planning Service

Belfast City Council  
Cecil Ward Building  
4-10 Linenhall Street  
Belfast BT2 8BP

 [www.belfastcity.gov.uk/LDP](http://www.belfastcity.gov.uk/LDP)

 [planning@belfastcity.gov.uk](mailto:planning@belfastcity.gov.uk)

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