



Topic Paper: Tourism

Local Development Plan 2020-2035



Belfast
City Council

Executive Summary

Context

Belfast has become a significant tourist destination attracting 9.5 million visitors and contributing £430 million to the economy in 2013 and supporting 17,319 tourism jobs across the Council area. 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 and provide employment.

The City is a major gateway through the sea, the airports, road and rail network to the wider region and UK facilitating visitors and tourists.

Major growth markets include business trips furthered by new conference facilities, short break leisure and cruise tourism. 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 and highlights the importance of marketing and reputation.

Belfast has a distinctive cultural scene with many events and festivals and a vibrant evening economy centred on the Cathedral Quarter and a unique built heritage and industrial heritage which has facilitated attractions and the hotel industry.

The plan will need to consider how to promote accessibility whilst protecting the City's cultural, man-made and natural assets.



Evidence Base	Social, Economic & Environmental Factors
<p>Regional Development Strategy (RDS) 2035 - Tourist Signature Destinations Planning Policy Statement 16 Tourism - Development and safeguarding of assets Strategic Planning Policy Statement - Sustainable and high quality tourism developments BMA Tourism Strategy Lagan Valley Regional Park Lagan Canal & nodes for access and recreation Belfast Integrated Tourist Strategy 2015-2020 Draft Tourism Strategy for Northern Ireland to 2020 - increase visitor numbers & revenue</p> <ul style="list-style-type: none"> • 3,182 hotel rooms available as of July 2015 which represents 41% of NI total • Titanic exhibition and the Ulster Museum were the most popular visitor attractions • Service & hospitality employment accounts for 8% of total employee jobs <p>• Provision of distinctive destination attractions</p> <p>Key Areas</p> <ul style="list-style-type: none"> • City Centre and its Quarters • Titanic Quarter • Award-winning Titanic Belfast • Cavehill and Divis (Belfast Hills) • Waterfront, Lagan River and Canal • Crumlin Road Courthouse • Transport Hubs 	<p>Will the plan provide, protect or enhance locations for cultural activities and the arts?</p> <p>Will the plan promote accessibility to local leisure and culture facilities?</p> <p>Will the plan increase business and employment opportunities in tourism sector?</p> <p>Will the plan encourage re-use of previously developed land and buildings?</p> <p>Will it encourage investment?</p> <p>Will the plan protect, enhance or restore local sites of nature conservation and safeguard the historic environment?</p>
	<p>Opportunities for Growth</p>
	<ul style="list-style-type: none"> • Additional major tourist attraction • Growth and diversity of hotel based industry with particular regard to hotel for business conference tourists • Growth of evening economy within the City Centre – areas of hospitality? • Re-use of vacant and redundant lands and buildings for tourism • Facilitate better use of the Waterfront area, River Lagan and canals for recreation • Grow and enhance the City's connectivity at main arrival points (airport connections, the port and transport hubs). • Provide public spaces for events

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1.0 Introduction

Purpose of this Document

- 1.1 This is one of a series of 17 Topic Papers which have been put together to inform the Sustainability Appraisal Scoping Report for the Belfast Local Development Plan (LDP).
- 1.2 Each Topic Paper provides a summary of the evidence base required for the Sustainability Appraisal, Preferred Options Paper and Local Development Plan. They establish a baseline position and identify the key issues that need to be addressed.
- 1.3 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 sustainability appraisal is one of the main drivers informing the preparation of the Local Development Plan.
- 1.4 Each Topic Paper can be read separately but, inevitably, there are important related matters in other topic papers and background evidence.

Member Workshops

- 1.5 The Topic Papers were drafted in the early part of 2016 to provide elected members with baseline information to inform the preparation of the Local Development Plan. As such the information presented within this topic paper is intended to:
 - Build the capacity of the members to make informed planning decisions, particularly within the plan making context;
 - Provide baseline information which will inform Development Plan Policy making at a local level;
 - Consider the tourism sector within the new Belfast Local Government District;
 - Assess the land use needs and opportunities for a growing tourism sector within the Belfast City Council area and to consider how best to safeguard, develop and improve the unique tourism assets enjoyed by the City; and
 - To link with important ongoing work in relation to the development of a Community Plan (the Belfast Agenda) and other strategic work being undertaken by the Council.
- 1.6 These papers were presented to members for discussion at a series of informal workshops with Planning Committee Members throughout the Spring 2016, with key issues and opportunities for the City identified for consideration.
- 1.7 The original Topic Paper entitled 'Tourism' was presented at a workshop on 21st March 2016. It has since been updated to ensure the statistics referenced are up to date for publication alongside the Preferred Options Paper.
- 1.8 The Topic Paper sets out the regional policy context, followed by an assessment of existing local development plan context and an examination of the existing tourism profile of Belfast.

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.

- 1.9 In compiling the Topic Paper main sources of information have included the Northern Ireland Tourist Board, Tourism Ireland, Visit Belfast, Discover Ireland, NISRA and the Belfast Integrated Tourist Strategy 2015-2020.
- 1.10 Any future decision making will need to be made within the context of a Sustainability Appraisal under the provision of Planning (Northern Ireland) Act 2011. This paper is therefore intended to generate members' ideas on how planning can best meet the needs of Belfast LGD.
- 1.11 It is important to stress that in compiling the Topic Paper the best information available has been used however it may need revised in light of the release of any new data. The paper will provide a foundation on which work can commence on a Preferred Options Paper as part of introducing the new Plan Strategy for Belfast City Council to replace that contained in the existing Belfast Metropolitan Area Plan.

2.0 Policy Context

- 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 culture, arts and leisure as instruments for positive change. Tourism and Creative industries are key priorities.

Regional Policy Context

- 2.2 The Regional Policy Context is provided by the Regional Development Strategy (RDS) 2035 and regional planning policy statements. A summary of these documents as they pertain to plan making and tourism policy is provided in the following sections.

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.

Regional Planning Policy Statements

- 2.6 The RDS is complemented by the Department of Environment's (DOE) Planning Policy Statements (PPS), the most relevant of which is PPS16 Tourism setting out the DOE'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.
- 2.7 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.
- 2.8 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.

Strategic Planning Policy Statement (SPPS)

- 2.9 The Strategic Planning Policy Statement (SPPS) was adopted in September 2015 to replace DOE PPSs 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.
- 2.10 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 bring forward a Tourism Strategy.

Local Policy Context

Belfast Metropolitan Area Plan 2015 (BMAP)

- 2.11 The BMAP covers the former City Council Areas of Belfast and Lisburn and the Borough Council Areas of Carrickfergus, Castlereagh, Newtownabbey and North Down. Insofar as it relates to Belfast, this plan includes proposals for the City Centre; the Harbour Area; Arterial Routes; Outer Belfast; the rural area and Lagan Valley Regional Park.
- 2.12 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.
- 2.13 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.
- 2.14 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 night 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 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 River Lagan and Canals to expand water based tourism and within the Lagan Valley Regional Park, Colin Glen Linear Park, Belfast Hills and Cavehill Country Park. BMAP lists access points to Belfast Hills and opportunities for future development.
- 2.15 The Lagan Valley Regional Park is Northern Ireland's first and only Regional Park. It is located between Stranmillis, Belfast and Union locks, Lisburn and 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 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, Shaws Bridge and Lady Dixon Park where favourable consideration is given to access and recreation amenities such as picnic areas.

Other Departments, Agencies and Organisations Plans

- 2.16 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 and contains policies to guide decision making and key projects to drive economic growth and deliver social benefits.
- 2.17 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 East Quarter through anchor developments alongside public realm schemes and social and cultural activities. A key principle of this strategy is to maximise tourism.
- 2.18 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.
- 2.19 There is a statutory obligation for the evolving Local Development Plan to take account of the Community Plan, known in Belfast City as The Belfast Agenda. It will be a joint vision for Belfast created in partnership with key partners, residents and community organisations to outline how the Council will work with statutory, business and community partners to shape future development and growth by setting medium and long term goals for social, economic and environmental improvements over the next 15 years. The draft Agenda is to be prepared for consultation in late 2016 and the Plan will be published at a later date.
- 2.20 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 things 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.
- 2.21 The Department of Culture, Arts and Leisure (DCAL) is the Government Department responsible for arts and creativity, museums, architecture and built environment policy with a direct hand in influencing cultural tourism in Northern Ireland and organising festivals and events. DCAL 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 & culture sector.
- 2.22 The Department of Enterprise, Trade and Investment for Northern Ireland (DETI) is the key player in formulating and delivering tourism policy. DETI acts as the host Department for Tourism Northern Ireland (Tourism NI is the trading name of the Northern Ireland Tourist Board-NITB). A Draft Tourism Strategy for Northern Ireland to 2020 (TSNI) provides direction and targets for sustainable tourism and sets out a range of priorities which fall under four key themes – People, Product and Places, Promotion and Partnership. The key aim is to increase visitor numbers to 4.5 million by 2020 and tourism revenue to £1 billion.

This Strategy identified Belfast City and Greater Belfast as a key tourism area and included the concept of signature projects.

- 2.23 The Town Twinning Initiative is funded by the “Europe for Citizens” program with the aim of two European communities coming together to face their problems and developing ties of friendship. Belfast is twinned with Bonn, Germany; Wonju, S Korea; Hefei, China; Belfast, Maine; Nashville, Boston and Cochabamba, Bolivia.
- 2.24 There are numerous departmental bodies and independents involved in tourism initiatives within the City and wider region including The Department of Agriculture and Rural Development (DARD), which includes the Forestry Service’ the Arts Council and the National Trust conservation organisation are responsible for assets and areas within Belfast, including Minnowburn, Divis and the Black Mountain, Lisnabreeny, Belmont Tower Church and the Crown Bar. The Northern Ireland Environment Agency (NIEA) is overseeing the protection monuments, such as the Giants Ring and our built heritage. The tourist information board ‘Visit Belfast’, Tourism NI, Tourism Ireland and the Northern Ireland Tourist Board are inevitably the first port of call for many visitors to the City.

3.0 Northern Ireland & Belfast Tourism Profile

- 3.1 The information contained within this report has been largely sourced from the Northern Ireland Tourist Board, NISRA and the Belfast Integrated Tourist Strategy 2015-2020.

Characteristics and Trends

- 3.2 Tourism is the largest and fastest growing industry in the world accounting for 9% of global gross domestic product. The European Travel Commission has reported growth of 3-4% per annum across the EU28 countries. Belfast tourism has displayed impressive growth, quadrupling visitor trips and tourism spend between 2000 and 2013. Belfast has become a significant tourist destination, attracting 9.5 million visitors and contributing £430 million or 5.2% of the economy in 2013 and supporting 17,319 tourism jobs across the Council area, or approximately 8% of total employee jobs (NISRA).
- 3.3 The DETI 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.
- 3.4 In 2014, 63 cruise ships with 115,650 persons docked in Belfast. Two new air routes have recently been introduced, with additional connections to Poland and Brussels. The draft Tourism Strategy and Action Plan outlined a target to support 10,000 extra jobs by 2020 and there is an aim to double revenue to £870 million by 2020 (Belfast Integrated Tourism Strategy 2015 – 2020).
- 3.5 In 2014 the average length of stay was 3 nights and average spend per trip was £212. The greatest majority of visitors 40% were from Great Britain, 30% from Northern Ireland, 11% from Republic of Ireland, 10% from mainland Europe and 9% from Northern America. The main reason for visiting Belfast was for holiday and visiting friends and relatives 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 2014 there were 1,166,224 overnight trips, an increase of 4% from previous year (excluding daytrips).
- 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. In 2014, NI attracted 10.8 million day trips from local residents, the highest number of day trips in the last 4 years, spending an average spend per trip of £26 and total expenditure of £282 million. 18% of day trippers would describe the main activity was eating and drinking, followed by 12% shopping and leisure and 9% walking.

Figure 1 – Stated Reason for Visit to NI (NITB, 2014)

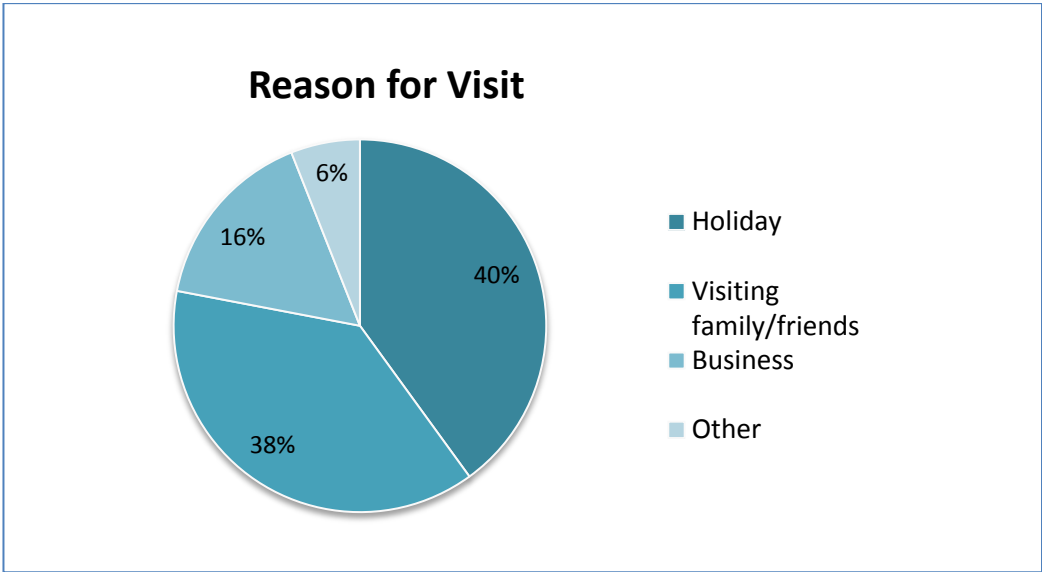
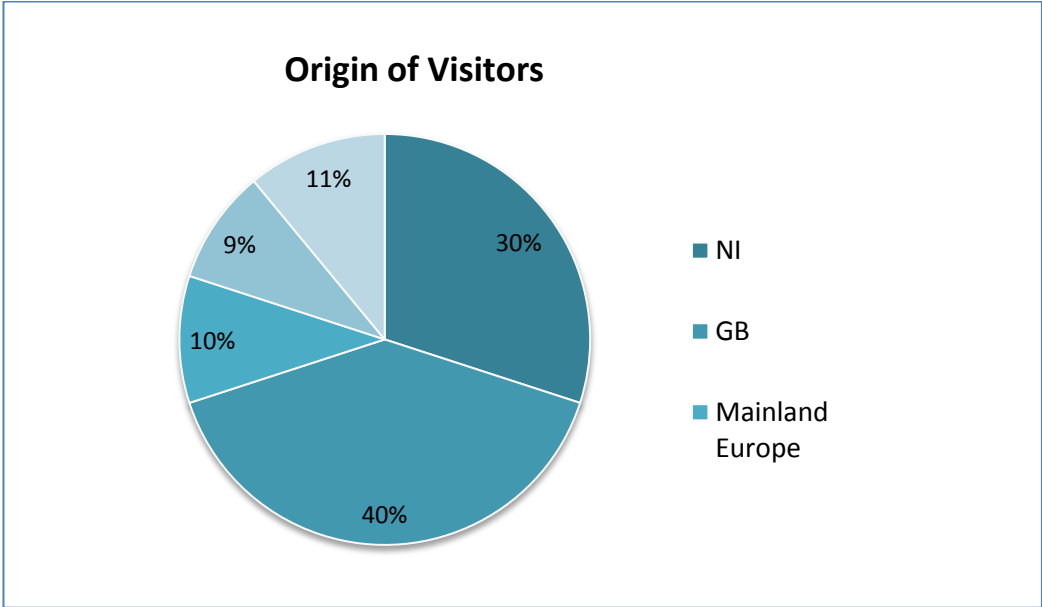


Figure 2 – Stated Origin of Visitors to NI (NITB, 2014)



3.7 Belfast has 29 hotels with 3,182 rooms available, as of July 2015, which represents 41% of total rooms within Northern Ireland, in comparison with Causeway Coast and Glens, which is the second highest with 20 hotels and 723 rooms (representing 9% of the total within Northern Ireland). Belfast also had 260 rooms within guesthouses/guest accommodation/bed and breakfast, representing 9% of the total within NI as of July 2015, in comparison to the North East, which had 883 rooms (or 30% of total rooms). General trends are that stock of these tourist facilities is decreasing. There are also eight hostels within Belfast LGD, including the International Youth Hostel on Donegal Road in the City core and four third level education campuses, which also offer tourist accommodation (RHM Commercial/ASM). Belfast LGD recorded the highest hotel room (79%) and bed space (61%) occupancy rates in NI (NISRA Jan-July 2015). Hotels within the £60+ price category

enjoyed the greatest increase in bed-space occupancy between January and July 2015. The average room rate was £73.27 in Belfast compared to £99.99 in Edinburgh.

- 3.8 There has been an influx of hotel developments since BMAP was published - for example, around St Anne's Square and the Cathedral Quarter and pending planning applications in the south central area. In Belfast LGD there is one 5* hotel 'The Merchant' and eleven 4* hotels (Visit Belfast) and a projected need of 1000 – 1500 more hotel rooms between 2015 and 2020, graded at 4 or 5 star quality (BCCRIS). Belfast Windsor House, the former Harland and Wolf Headquarters Building and Drawing Offices on Queens Road and a site on Donegal Road have all been granted planning permission for hotels and there are pending applications within Linenhall Street, Victoria Street, Franklin Street and Corporation Street. Whilst it is estimated that there are 1,184 rooms in future supply these recent approvals are all indigenous brands unlikely to develop again in foreseeable future and there is call for further international brands (ASM Chartered Accountants Hotel Sector Market Analysis). Higher classified establishments achieve the highest levels of business.

Principal Attractions

- 3.9 The Titanic exhibition and the Ulster Museum were the most popular visitor attractions in 2015 (NITB Belfast LGD Factcard 2013-2015). Indeed, 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 the retail centre, Cathedral and Titanic Quarters, Odyssey, Lagan River, Waterfront Hall, Universities and the Belfast Hills. Whilst Belfast offers many cultural and both natural and built heritage attractions in comparison to other UK and European cities, there appears to be demand for a distinctive destination attraction. The BCCRIS suggests a contemporary visual art 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 Belfast City Council's plan to create a second major tourist attraction for the city in accordance with the BCCRIS. A feasibility study is being completed on the 'Belfast Story' visitor attraction on behalf of Belfast City Council.

Tourism Sectors

Business Tourism

- 3.10 An extension of the Waterfront Hall to serve an exhibition and conference facility has potential to create 1500 new jobs and deliver £45 million of additional income by 2020 as conference and business tourism increases (BCC website). Business tourism is attracted by meetings, conferences and exhibitions and incentive travel and opportunities exist to raise Belfast profile further through trade shows and events. Business tourists inevitably require accommodation and an increasing stock of this is necessary to meet demand.

Cultural Tourism

- 3.11 A distinctive and thriving cultural scene can increase the attractiveness of Belfast as a visitor destination and Belfast is renowned for its atmosphere. In 2012 Belfast was home to 70 cultural festivals, 40 galleries, 17 theatre companies, 3 receiving and producing theatres, 15 arts venues and 150 pieces of public art. There are numerous organisations within Belfast that represent the cultural scene and Belfast City 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 largely popular.
- 3.12 Belfast has a rich heritage of historic buildings, such as Crumlin Road Gaol and Parliament Buildings and public parks such as Botanic Gardens and Tropical Ravine. These places, which provide value and authenticity, are distinctive and provide a unique sense of place. Tourist and visitor attractions are expanding at the Crumlin Road Gaol to include a whiskey distillery, bar and restaurant. However, the adjacent Courthouse remains vacant and represents a missed opportunity as planning permission for a hotel has expired. European Heritage Open Day is a successful yearly event in which many of these buildings and spaces are open for visitors. 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 has much to offer tourists with an interest in music through exhibitions in the 'Oh Yeah' music centre, singer songwriter events and annual music week and also in theatre, opera and on screen, with the City's facilities including the MAC, Culturlann, Lyric and Spectrum theatre and numerous cinemas. Home grown artists such as Snow Patrol have an international reputation travelling worldwide.
- 3.13 The Ulster Museum was the second most popular visitor attraction in 2015 (NITB Belfast LGD Factcard 2013-2015), highlighting the appeal of museums and art galleries. Whilst Belfast does have a high quality institution within the MAC in the Cathedral Quarter there is call for further attractions. The resurgence of the Cathedral and Gaeltacht Quarters has taken advantage of cultural heritage, enabling urban regeneration and economic growth to these areas. The Cathedral Quarter comprises hotels, arts centres, restaurants and bars and is the focus of the City Centre evening economy. There is potential for the Inner West/Castle Street area to become a complementary quarter and to grow the City's evening economy.
- 3.14 Belfast has a diverse offering of restaurants, cafes and pubs. St Georges Market, situated in a prominent historic building, is a popular attraction in the City. St George's Market was named the UK's Best Large Indoor Market 2014. St George's Market was named the UK's Best Large Indoor Market 2014 and was named the UK's Best Large Indoor Market 2014 by the National Association of British Market Authorities. NITB Visitor Attractions Survey 2011-2012 found that 36% of visitors' spend was on food and drink. The City is participating in the Northern Ireland 'Year of Food' in 2016, building on events such as the annual Belfast Food and Drink Festival. A fifth of tourists to Belfast visited a pub and the same percentage ate in a pub. The FolkTown market within Bank Square has a distinct food and artisanal character, re-emerging this year following environmental improvements underlining the impact of a quality environment.

- 3.15 Public art can transform the physical landscape of places and can provide an appreciation of public spaces and unique character and heritage. 'Rise', an art piece in the west of the City, is the tallest sculpture in Ireland. A welcoming, accessible and safe environment free of graffiti and litter aids to the quality of environment and overall appeal.

Adventure and activity tourism

- 3.16 Belfast City Council owns and manages a variety of open space, sport and outdoor recreational areas throughout the City from parks to playing fields. Belfast has the ability to maximise its potential further through adventure and activity tourism such as the T13 urban sports centre and the stadium developments at Windsor Park, Ravenhill (Kingspan) Rugby and Casement Park. There are approximately ten golf courses within Belfast LGD including Belvoir, Ormeau, Balmoral, Shandon Park, Cliftonville, Fortwilliam, Malone, Knock, Dunmurry and Colin Park. DOE supports Outdoor Recreation NI, an umbrella organisation for Walk NI, Mountain Bike NI, Cycle NI, Canoe NI and NI orienteering.
- 3.17 Whilst Belfast is a hub/gateway with easy access to the coastline and the countryside of the wider region, the Council area has a unique natural heritage and landscape of rivers, canals, coast and hills which offer tourism possibilities. Belfast Hills provides walking, mountain biking and rock climbing pursuits (see leaflet at Appendix 1). Lagan Valley Regional Park attracted the highest numbers of visitors off all the Country Parks/ forests/gardens with 1.3million persons in 2014. The River Lagan has potential for angling, kayaking, canal barges, walking and cycling trails. The Lagan Canal 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 (see leaflets at Appendices 2&3). Whilst there are activity centres, such as Belfast Activity Centre in Barrett's Demesne and Mary Peter's Track, the Tourism Strategy seeks to promote and create an urban sports hub.
- 3.18 Belfast City Council area contains numerous natural heritage land use designations, such as historic demesnes, 85 Local Landscape Policy Areas (including Stormont Buildings and City Hall), Belfast Basalt Escarpment, Craigantlet Escarpment and Castlereagh Slopes Areas of High Scenic Value, Belfast Lough Ramsar Site and Special Protection Area and 60 Sites of Local Nature Conservation importance, such as the Harbour and inner lough.

Events and Festivals

- 3.19 Significant investment in event programmes, including the Tall Ships and Giro D'Italia, have generated national and international media impact and attracted many tourists to the city. There are many annual events within the City such as the Christmas Market, Ulster Bank Festival, Belsonic and Tenants' Vital music events, Lord Mayors Show, St Patricks Day Parade and Culture Night to name but a few. In 2011 the MTV European Music Awards held in Belfast generated £10 million to the local economy and in the same year Belsonic music concerts attracted 40,000 people. The Belfast Tourism Strategy seeks to attract one international event per year and develop six signature events throughout the year.

Tourism Infrastructure & Support

Transport and Accessibility

- 3.20 The proximity of the George Best City Airport to the City Centre is an advantage which the Belfast Regional Investment Strategy (BRIS) 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. The Harbour Commissioners plan to construct a cruise dock terminal to facilitate the ever growing number of visitors arriving via Belfast seaport and utilising the City's maritime heritage. The rivers and canals are an underused resource with opportunities to further provide floating restaurants such as the popular barge and water taxis for example. Whilst there are existing tourist trails and walking tours, connections could be bettered between principal attractions.

Training and labour

- 3.21 Given the growth of the service and hospitality sector and importance of employment provision, 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. Service and hospitality standards within the City are highly rated by visitors.

Services

- 3.22 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 Centre, Castlecourt, Spires 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. A higher proportion of employee jobs in Belfast were in the services sector (92%) compared to the NI average of 83.5% (NISRA, 2014).

Marketing and promotion

- 3.23 The Belfast Integrated Tourist Strategy aims to improve the reputation of the City and marketing activity and 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 to celebrate Christmas. Marketing campaigns by the Council, Tourism Ireland, NITB and Visit Belfast reach wider audiences as the City attracts more visitors. Tourism Ireland commenced a marketing advert in January 2016 which is to reach 23 world markets. Marketing increasingly focuses on the 18-35 age bracket, the 'Millennials', 'young at heart' and 'culture seekers'. The

Tourist Information Centre has a prominent position opposite the City Hall following relocation with strong online presence. 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 impact on business. 48% of people use mobile devices for inspirational travel research and 24% UK consumers share their experiences via social media while on holiday (Expedia). Mobile technology has an important role allowing travellers to tailor holidays to their needs on the ground. 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.

- 3.24 Belfast City Council is developing 'Place Positioning' to support the ambitions of the City, 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.

Outlook

- 3.25 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; experiences and activities that aid understanding of history and culture; world citizenship; urban sports tourism; signature festivals and events; local narratives and innovation and creativity.

4.0 Issues and Approaches

- 4.1 The purpose of this Topic Paper is to set out a summary of the evidence base required for the Sustainability Appraisal, Preferred Options Paper and the new Belfast Local Development Plan 2020-2035. It was originally were drafted in the early part of 2016 to provide elected members with baseline information to inform the preparation of the Local Development Plan. It has since been updated to ensure the statistics referenced are up to date for publication alongside the Preferred Options Paper.
- 4.2 This paper highlights the importance of tourism on the economy and existing employment generated by the fastest growing industry in the world. 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 were identified. Tourism plays an important part in contributing to the economy of Belfast and employment generation. By strengthening the tourism offering the City can ensure it has the capacity to compete for visitors and tourism growth.
- 4.3 This paper suggests potential opportunities, such as growth and diversity of the hotel based industry; facilitating principle attractions; importance of the night time economy and supply of recreational and leisure activities.
- 4.4 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, man-made and natural assets.
- 4.5 This Topic Paper includes analysis of available information on the tourism sector in NI and Belfast City. Below is a summary of the key findings that will help to inform Tourism policy in the new Belfast LDP and a summary of the key issues that the LDP should address.

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
- Significant business tourism
- Increasing demand for hotels
- Necessity for additional attractions or principal attraction
- Potential from new air connections
- Potential for growth in cruise, food, adventure and other specialist tourism

Summary of Key Issues to be Addressed in New Plan

- Poor leisure and entertainment offering has impacted on the City Centre's evening economy

- Need to provide further hotels particularly to serve business tourists with possibility of Waterfront location and international brand
- Potential to convert vacant or underused historical buildings to provide unique 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 leisure, sports and recreational uses
- Potential of improved advertising and wayfinding
- Necessity to protect unique built and industrial heritage as tourism assets.
- Necessity to improve transport links, gateways and green linkages into the City Centre.
- Necessity to connect open spaces within the City Centre and beyond
- Necessity for public realm to be improved and encouraged particularly along waterfront and provision of open spaces in the City.

4.6 The information contained within this topic paper has been used to inform the next stage of the LDP process, the Preferred Options Paper.

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