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## **1. INTRODUCTION**

### **1.1 Background / Objectives**

The East Belfast Business Initiative, in association with the Northern Ireland Tourist Board and Belfast Regeneration Office commissioned TTC International to undertake a study to develop a Tourism Strategy for East Belfast. The Strategy is to provide a co-ordinated framework in which tourism can develop over the next five years.

The overall objectives of the study are to assess and make recommendations in relation to the following:

- To examine the current performance and potential of East Belfast as a tourism destination
- To examine the current and potential tourism product, including attractions, cultural and industrial heritage, accommodation, tourist facilities, infrastructure and communications, events and physical environment
- To identify how the Strategy could and should link with the development strategies of Belfast City Council, NITB and other local based development plans
- To identify potential partners, both funding and other interested parties, to take forward recommendations made in the study
- To detail an action programme, including probable costs and resources required for the implementation of the strategy, set within a realistic timescale
- To detail an appropriate mechanism to take responsibility for the implementation, management and progression of the tourism strategy
- To identify training and employment opportunities in the local area

The full terms of reference are set out as Appendix 1.

### **1.2 Definition of East Belfast**

The term East Belfast conjures up a vision of Harland & Wolff cranes, the Oval, and crowded terraced streets. Essentially it is an industrial Edwardian image. This area is now known as the 'Inner East' and the boundaries of this study area are considerably greater. They are the boundaries of the Greater East Belfast Partnership Board and in the terms of reference are defined as east of the River Lagan, Ravenhill and Cregagh and stretching over to Dundonald in the Borough of Castlereagh.

There is therefore a tremendous mix of urban landscape and lifestyle in this area. The 'Inner East' sits perhaps uneasily beside affluent Stormont and Castlereagh. A map of the study area (Figure 1) indicates the range and scale of the area – something which the plain title East Belfast does not itself indicate.

This lack of homogeneity in the people of the area, and indeed the fact that it embraces part of Belfast City Council area and part of Castlereagh Borough Council area will be reflected later in the study when policy priorities are to be considered.

### **1.3 Methodology**

The methodology used in preparing this report was as follows:

- An initial detailed briefing by EBBI Steering Group;
- Detailed desk research by the consult team, reviewing the relevant data, reports, and available material;
- Visits were paid to key areas, routes and product audits undertaken;
- In-depth consultations were held with a wide cross-section of stakeholders within the area, as well as public bodies, community groups and public representatives;
- The Terms of Reference and Budget did not facilitate any primary market research.

A list of all of those who contributed to the consultative process is attached at Appendix 2.

### **1.4 Report Content and Layout**

Chapter 2 provides an analysis of tourism performance in the East Belfast Study area and sets it in context.

Chapter 3 then examines the tourism product itself and places its strengths and weaknesses in context.

Chapter 4 addresses the issue of tourism performance and sets a context for Belfast itself and particularly the East.

Chapter 5 then enters the arena of Strategy and the key issues facing the area.

Chapter 6 examines the Goal, the Vision and the Strategy.

Chapter 7 provides a series of recommendations on Product development within the area while Chapter 8 leads on to the important issue of marketing.

Chapter 9 is concerned with matters relating to Quality, Training and the Welcome which visitors may receive.

Chapter 10 makes recommendations on the type of Organisation that should be adopted to implement the Strategy.

Chapter 11 finally indicates an Action Plan for the outputs of the Strategy.

## **2. TOURISM IN EAST BELFAST**

### **2.1 Tourism Performance of Belfast**

Belfast attracted more than half a million visitors in 1999. 24% of all visitors to Northern Ireland, both domestic and out-of-state, visit Belfast. The number of visitors to Belfast has increased annually since 1996, and the rate of increase doubled to 11.3% during 1999.

The number of tourist nights spent in Belfast increased sharply in 1999 – a direct result of the increase in visitor numbers visiting the city.

The average length of stay in Belfast has not changed significantly over the period. Although there was a marginal increase in the average length of stay, there is an underlying shift towards a shorter stay, which this is in line with the current international trend towards shorter, more frequent trips.

**Table 201: Total Visitor Numbers to Belfast 1995 1999  
(Based on three year moving averages)**

	1995	1996	1997	1998	1999
Trips 000s	443.5	425	447.6	473.1	526.4
% Change		-4.2	+5.3	+5.7	+11.3
Nights 000s	1996	1889	1901	1962.5	2271.6
% Change		-5.4	+0.6	+3.2	+15.8
Average nights	4.5	4.4	4.3	4.1	4.3

Source: NITB Regional / Local Authority Tourism Estimates 1999

During 1999, the total tourism spend in Belfast amounted to almost £80m, 25% of total tourism revenue in Northern Ireland. While total tourism expenditure has increased year on year in the past five years, the most significant increase occurred during 1999 (+21.8%). The increase in total revenue in 1999 is a function of the increase in visitor numbers during 1999, combined with a real increase in average spend per trip.

**Table 202: Total Tourism Revenue to Belfast 1995 – 1999  
(Based on three year moving averages)**

	1995	1996	1997	1998	1999
Spend £m	57.2	59.1	61.4	65.5	79.7
% change		+3.3	+3.9	+6.7	+21.8
Average Spend	128.97	139.05	137.18	138.44	151.41
% change		+7.8	-1.3	+0.9	+9.4
Average nightly spend	28.66	31.29	32.30	33.38	35.09
% change		+9.2	+3.2	+3.3	+5.1

Source: NITB Regional / Local Authority Tourism Estimates 1999

## 2.2 Tourism Performance of East Belfast

It is estimated that 118,200 staying visitors to East Belfast generated approximately £13 million in tourism spend during 1999. However, as the area lies within close proximity to central Belfast, it is very likely that visitors staying in East Belfast spend a significant proportion of their total trip expenditure in central Belfast.

**Table 203: Estimate of Tourism Numbers and Revenue to East Belfast 1999**

	1999
Total visitors	116,000
Total visitor nights	569,000
Average nights	4.8
Spend £m	13

*Source: NITB Regional / Local Authority Tourism Estimates 1999 and Consultants Estimates*

**It is not possible to refine this figure any further without primary research. It is safe to assume that a substantial proportion of this spend by staying visitors who overnight in East Belfast is spent in the main shopping areas or where the principal tourist attractors are located. This is particularly true of the high proportion of visitors who are staying with friends and relatives.**

## 2.3 Profile of Staying Visitors to Belfast

### How overnight visitors spend their money

The *Belfast Tourism Monitor 1999* shows an analysis of visitor spend as follows:

**Table 204: Allocation of Expenditure 1999**

	% of Spend
Retail	35
Catering	26
Accommodation	23
Travel	10
Entertainment	5
Other	1

*Source: Belfast City Council – Belfast Tourism Monitor 1999*

### **Factors prompting a visit to Belfast**

The most influential factor prompting a visit to Belfast is to visit friends and relatives (39%), followed by accessibility (18%), to participate in a particular activity (16%) and for historic interest (11%).

**Table 205: Factors prompting a visit to Belfast**

	<b>%</b>
Visiting Friends & Relatives	39
Accessibility	18
Particular Activities	16
Historic interest	11
Scenery & Countryside	8
Entertainment & Recreation	8
Friendliness and Hospitality	8

*Source: Belfast City Council – Belfast Tourism Monitor 1999*

### **2.4 Day Visitors to Belfast**

The majority of spend by day visitors to Belfast is in the retail sector (66%), while eating and drinking accounts for 14%, and travel 12%.

**Table 206: How day visitors spend their money**

	<b>% of Spend</b>
Buying clothes	38
Other shopping	28
Eating & Drinking	14
Travel	12
Entertainment	3
Other	5

*Source: Belfast City Council – Belfast Tourism Monitor 1999*

The single most popular reason for a day visit to Belfast is for a leisure day out (40%), followed by shopping (23%).

It should be noted that the Belfast Tourism Monitor Survey does not currently carry out interviews anywhere in East Belfast. This is a characteristic of this type of Survey where visitors must be readily found to interview – and that will principally be in city centre locations. It is to be hoped that the Monitor will in 2001 interview at Odyssey and possibly Parliament Buildings, thereby giving an East Belfast perspective to the results.

**Table 206: Purpose of Visit**

	<b>%</b>
Leisure Day Out	40
Shopping	23
Visiting Friends & Relatives	9
Business / Conference	6
Scenery & Countryside	8
Other	11

*Source: Belfast City Council – Belfast Tourism Monitor 1999*

### **3. THE TOURISM PRODUCT IN EAST BELFAST**

Tourism destinations are generally considered to consist of five main components:

- Attractions – those aspects of a destination that provide the appeal and motivation of a visit;
- Facilities – accommodation and catering;
- Transport – both access (getting to the destination) and internal (moving around within);
- Services – shopping, banking, medical, information; and
- Public Infrastructure –the support system, including roads, parking and utilities.

All five components are essential to the operation of tourism and are referred to in this report as tourism products. A shortcoming in one undermines the quality of the product overall and gives a less than satisfactory visitor experience. The combination of all five elements or most of them ensures the basis of a tourism destination.

City tourism differs from 'traditional' tourism in that the blend of the five components outlined above will differ substantially from a template for a holiday area. City tourism will usually have a bias towards short breaks, towards events, towards business add-ons, and will have an element of 'trendiness'. Within the British Isles the currently 'in' cities are Dublin, Manchester, Newcastle upon Tyne and the perennial London, while now somewhat in decline are Glasgow and Edinburgh. In 1995 the Sunday Times described Belfast as the 'hot destination' for city breaks for the year. Sadly this only lasted a year and building a sustainable city tourism product is a lengthy business.

The study area at hand is part of a growing city tourism destination – it is not a destination in its own right. It is not possible to find a comparison where a geographical part of a City has chosen to differentiate itself from the whole. It would be possible for say Manhattan or London's West End or the Left Bank in Paris – in theory at least – but it is not done. The City itself is the viable tourism entity and the sub division will act as a part of a whole.

It stands to reason therefore that only some of the five components of a destination set out above will be found in the study area. It would be coincidence only if all were found in abundance – this would be likely to happen in a city centre rather than a distinct but peripheral geographical entity.

This is an important point to bear in mind. The objective should be to maximise as many of the components as possible within the area while remembering that the success of the destination itself dictates the success or otherwise of a subsidiary area.

#### **3.1 Appeals and Attractions**

'Attractors' are those elements of a tourism destination, which give it its appeal. They stimulate an interest in visiting an area and provide those things that help make up the image of an area. They provide the essential incentive to choose a destination and are the primary measure in assessing satisfaction after a visit. In general the other four components set out above come into play after the stimulus of the attractors. For city tourism there are two broad categories to consider:

- Man –made attractors
- Cultural attractors

**Table 301 Principal Tourism Attractions**

Key 5= Excellent.....1=Poor	Rating	Comments
<b>Man-made Attractions</b>		
Urban Areas	2	Approaches very poor. Blight. Some visual delights.
Conference Centres	3	Largely Hotel Based
Golf Courses	3	Limited Access
Amusement/Entertainment	2	Pre Odyssey
Shopping	3	Nothing out of the ordinary
<b>Cultural Attractions</b>		
Industrial Archaeology and Heritage	2.....	Currently Inaccessible
Literary Heritage	2	Limited Impact
Music/Song/Dance/Theatre	1.....	In its Infancy
Interpretation and Presentation	1	Competitively Poor

Source: Consultants' Assessment

Within the NITB Survey of Visitor Attractions for 1999 only two entries feature in East Belfast and both are relatively small scale. Streamvale Open Farm attracted 50,500 visitors while the RUC Museum at Knock attracted 2,200.

Within the Belfast City Pocket Guide for Summer 2000 published by Belfast Visitor & Convention Bureau the picture brightens. The following appear:

The largest development in Belfast for many years opens in December 2000 – the Odyssey Arena which becomes a major international venue and the home of the Belfast Giants Ice Hockey team. Early in 2001 the remainder of the complex opens bringing a Science centre 'W5' and an IMAX cinema plus associated cinema complex and pavilion. This will be examined in depth later.

Dundonald International Ice Bowl

Stormont Grounds

Aunt Sandra's Candy Factory

Ulster Weavers Centre

And in or touching East Belfast but not in the study area:

Lagan Boat Company

Lagan Lookout

With the exception of the yet to be opened Odyssey none of the above are of substantial tourism significance.

While not strictly meeting the normal definition of tourist attractions there are other facilities used by tourists – especially VFR – that are worthy of listing:

The Oval – home of Glentoran FC

Strand Cinema – a period cinema

CS Lewis Heritage – St Mark's Church, Dundela; Wardrobe Sculpture.

At this stage the potential of places and products to become tourist attractions is not being considered.

### **3.2 Visitor Accommodation**

It is estimated that the stock of hotel rooms in Belfast has doubled in the period from 1994 to 2000. Major hotel investments are evident – Hilton, Jurys, Posthouse, Holiday Inn. Most of the investment relates to the City Centre and its regeneration in business terms was and is essential for tourism in the city as a whole. Hotel investment naturally gravitates to centres before it spreads outward. A second wave of hotel investment in Belfast has evolved around the Golden Mile and the university. The linking characteristic here is entertainment and nightlife in a 'neutral' location.

East Belfast has not yet shared in this growth of accommodation. The position as set out in NITB's Accommodation Guide 2000 is as follows:

**Table 302: Accommodation Stock**

<b>Hotels</b>	<b>Rooms</b>	<b>Grade</b>
<i>Stormont</i>	109	****
<i>Park Avenue</i>	56	***
<i>La Mon</i>	38	*
<b>Guest House</b>		
<i>Ravenhill</i>	5	*
<b>Bed &amp; Breakfast</b>		
<i>Ashberry Cottage</i>	2	N/A
<i>Bowdens</i>	2	
<i>Eagles</i>	4	
<i>Hazelville</i>	3	
<i>Maranatha</i>	9	
<i>Crecora</i>	7	
<b>Self-Catering</b>		
<i>Greggs Quay</i>	8	
<i>The Terrace</i>	2	

There are no Tourist Hostels in East Belfast and only three in the whole City. The new International Youth Hostel near Sandy Row replaced one fringing East Belfast, again reflecting the desire of visitors for city centre locations.

There is one Camping and Caravan Park operated by Castlereagh Borough Council, which opens from Easter to October. Belfast's only competing site is at Jordanstown Lough Shore Park.

### **3.3 Analysis**

The accommodation stock in the study area is clearly low, but not surprisingly so. As already stated, city centres are preferred visitor locations both for business and holiday and peripheral development comes as a destination matures and prime central locations become harder to find. The industrial heart of East Belfast has been in part decline but has utilised its traditional hotels for one level of visitor, while taking its top management to the 5\* hotels further afield. This is normal business practise. The lack of industrial development land in East Belfast will not encourage hotel development to be underpinned by business traffic.

Similarly the large tracts of Inner East and suburbia do not encourage hotel growth either.

Future opportunities will be examined in depth later.

The limited number of Guest Houses and B&Bs is something that can be addressed. Again the nature of the area needs to be considered. Semi-detached houses, small terraced houses and high density housing rarely make good supplementary accommodation. The preference is for detached houses, large Victorian terrace houses or modern bungalows. An examination of the existing supplementary accommodation in the area confirms this pattern. Having said this, there is scope for further growth, which will be discussed later.

Hostel accommodation is absent, but such premises like to locate near nightlife, be in neutral territory and be close to the 'heart' of the city.

### **3.4 The Welcome**

Visitor surveys indicate that visitors to Northern Ireland feel uneasy in and may avoid areas where an over abundance of flags, graffiti and kerb painting suggests sectarian and/or para military tensions. Such demonstrations suggest 'keep out' and many will then do so, unless accompanied by a knowledgeable local guide.

Those groups, particularly community groups, should bear this in mind when wishing to develop tourism business. The line between exuberant celebration and a message of hostility is a fine one. In the past summer period it is the consultants view that the latter was the message conveyed.

The issue of murals is a separate one, and by and large these have become or have the potential to become attractions to visitors. Again there is a fine line between folk art and messages of hate.

A combination of the above and urban dereliction stemming from planning or road blight can lead to an image of the area which will ensure that visitors continue to avoid it.

## **4. TOURISM OUTLOOK**

### **4.1 Global Outlook and Trends**

The three top engines of economic growth in the 21<sup>st</sup> century are confidently expected to be information technology, telecommunications and tourism. By the year 2006 tourism is forecast to account for 11.5% of global GDP and 11.1% of global employment.

The global industry is expected to grow well into the 21<sup>st</sup> Century according to the World Tourism Organisation report *2020Vision*. The expansion of late is expected to continue at a slower rate with only the issue of oil costs clouding the horizon.

It is forecast that 1.6billion tourists will be visiting foreign countries annually by the year 2020, spending a total of US\$2trillion per year- or US\$5billion per day. This will be five times the expenditure of 1996.

Globally it is expected that:

- The pattern will be for long-haul travel to continue to grow much faster than short / medium haul – this is expected to be particularly marked in European origin markets: and,
- A drop in the rate of growth to below+5% in short / medium haul intra-European travel is predicted.

### **4.2 Trends in Demand**

#### **Customer Trends**

Changes in customer attitudes are being brought about by education, experience and global information. This has major strategic implications for tourism destinations when added in to the equation are factors such as demographic shifts, changing lifestyle values and technological change.

Some characteristics of tomorrow's customers provide pointers to their expectations:

- People are taking more frequent trips of shorter duration. The main holiday is reducing in importance with the growth of short breaks and special interest travel;
- They are becoming more sophisticated, more travel experienced, and they demand increasingly higher standards. They require greater authenticity and more discoveries. They seek out the opinions of other travellers about destinations;
- They are older and more affluent, more physically and mentally active, and require a greater range of more activity-oriented experiences;
- They are more self-aware in an increasingly stressful world, prefer less crowded environments and require time-efficient use of their leisure time;
- They value learning and self-improvement. They are better educated and more discerning and seeking fulfilling experiences beyond mere relaxation. They want to become involved with their environment, learn new skills and interact with communities and cultures of their destinations;
- They look for holidays that have a low impact on both the physical and cultural environments and
- They increasingly look for better value for money and transparent cost structures and they make comparative value judgments on a more global basis. They require clear 'menus' of holiday options and their cost, but with the facility to customise their holiday;
- They are high users of IT and especially the Internet where they will seek information and interactive reservations systems. This will place the decision-making on every aspect of the holiday – short or long- in their hands.

In many cases, tourists are looking for more 'content' in their holidays and this is reflected in a number of trends.

- Cultural activities are becoming increasingly important in choice of destination, often as an add-on factor. 'Culture and heritage' are increasingly being promoted by all destinations, reflecting the desire to attract high-yield tourists. 'Culture and heritage' covers a variety of product types with much scope for specialisation and innovative development. This includes 'themed' events and the 'dynamising' of attractions, helping to differentiate the product, encourage repeat visits and circumvent the 'been there, seen that' syndrome.
- Continuing growth in the increasingly competitive sports activity market. While the overall specialist market is small, combinations of activities or add-ons, such as mixing sports with each other, with special events, or cultural pursuits, are becoming increasingly popular.

#### Product Trends

The principle product trends evident in overall demand patterns include:

- continued market and product segmentation;
- polarisation of tourist demand – comfort V adventure;
- 'green tourism': the growing incidence of nature based attractions;
- 'soft- adventure' where challenge and activity are combined with comfort;
- products which deliver excitement, education and entertainment;
- interpretation of history and culture;
- authentic small scale developments allowing for specialisation and / or interaction with the local population;
- special events including festivals are increasingly being used as travel motivators;
- emphasis on delivering consistent quality service;
- a proliferation of brand named products;
- increasing emphasis on city-breaks;
- accessibility by air for short city breaks increasingly important.

#### Implications for Tourism to Northern Ireland

The trend towards shorter stays provides a growing opportunity for city tourism but also presents a marketing challenge and a product provider challenge. 'Attractors' and 'motivators' become increasingly important in choice of destination and a destination will very much have to present 'reasons to visit'. This is equally so for a portion of a destination, where the short stay visitor will take in the top sights and attractions, leaving the less tempting off the list.

The holiday market, and specifically the short break market cannot be treated as homogenous any longer, but must be addressed with a segmented approach. Quality and value for money must be reinforced by good physical, operational and service standards. The negative effects of congestion or 'destination overload' which other cities are experiencing present an opportunity for Belfast.

The more significant emerging segments are variously defined as:

- the 'grey market', reflecting the ageing of the population who have increased time and resources to travel;
- 'special interest market segments'. Here the 'reason to visit' is becoming increasingly important as the motivating factor for travel. These include participation in sporting activities plus cultural and entertainment activities or events;
- 'self-fulfilling travel segment' representing people who travel to further enhance their lives through intellectual and/or physical fulfilment;
- 'adventure travel' representing peoples desire to experience achievement.

(The Northern Ireland Tourist Board for example, in the GB Market, targets 'Scottish/Northern Cabbies', 'Scottish Cardies', and 'Scottish/Northern Racquets' – these are all carefully identified and targeted market segments likely to 'buy' Northern Ireland.)

This radically changing profile presents three critically important challenges for the supplier of travel experiences:

- how to communicate the range, appeals and experience value of the destination or product;
- how to develop an innovative, flexible product appropriate to the consumer needs;
- how to achieve distribution of a product meeting a wide range of individual demands.

While these trends in travel may seem distant from the desire to 'get on and do something' about tourism, they nevertheless reflect the factors which will mitigate between success and failure. Market segmentation is essential where an area or destination has limited resources for marketing, and it turn it should help guide the use of scarce resources in tourism development. Only through careful analysis of markets and of what the consumer wants – rather than what the supplier thinks he/she needs - can timely tourism development be achieved and sustained.

### **4.3 Outlook for Tourism to Northern Ireland**

Tourism to Northern Ireland reached an all time high in 1999 with **1.66M** trips, **8.77M** nights and revenue of **£265M**. This was an overall increase of 12% on the previous year.

A decade of growth saw roughly a 50% increase in visitor numbers and two-thirds increase in revenue. 1995 saw a 67% increase in holiday visitors alone but sadly this was to fall away over the next two years as violence returned. In 1995 30% of staying visitors came on holiday – in 1999 the figure was 19%.

Meanwhile the Republic of Ireland saw unprecedented levels of growth in the decade far outstripping rates here. An indication of what can be achieved. Much of that growth was in the short stay city break market with Dublin in particular gaining something approaching notoriety with its success.

Forecasting Northern Ireland tourism levels is a risky business depending as it does on the level of civil unrest particularly in the peak season, and the threat or otherwise of violence. Northern Ireland tourism is also influenced by the overall success of Irish tourism, bearing in mind that 70% plus of visitors come from or via the Irish republic. Other issues to be factored in are Sterling, the cost and availability of airfares and routes and the impact of the trends outlined above.

Notwithstanding new work being carried out by NITB on a new strategy, it is likely that the annual rate of growth in tourism should be in the order of +10% in the next five years. The largest growth is likely to come from visitors to the island extending their visit into Northern Ireland. Landmark sites such as the Giant's Causeway and Belfast are likely to feature in

organised tour itineraries and with the independent traveller. This adds another dimension to the portfolio of Belfast products and an added dimension to short breaks.

#### **4.4 Outlook for Tourism to Belfast**

In the early 90's Belfast lost its pariah status and began to develop in stature as a place to visit. In late 1994 and all of 1995 it did perform as the Sunday Times 'hot' destination. Beds were in short supply and visitors thronged the city. This growth was short term and unsustainable, particularly as it was fuelled from the ROI market at a time with Pound-Punt parity. Sadly the Sterling-Euro exchange rate makes Northern Ireland an expensive destination for southern visitors and the novelty value has worn off. Continuing sectarian violence does not act as an incentive.

However hotel beds in Belfast have doubled in a five-year period after unprecedented investment. The city overall is looking and feeling prosperous; it is promoted professionally and imaginatively, and it is carving its own distinct market presence.

For East Belfast there is an opportunity to share. Whether it can or not depends to an extent on internal factors over which local stakeholders have control. Those most likely to impact tourism are:

- the ability of the area to appeal to the various market segments by providing appropriate 'attractors', accommodation and services, in order to compete effectively with other places;
- the competitiveness of the area in terms of value based quality delivered for price paid by visitor;
- marketing effectiveness in attracting visitors to the area.

Again it must be stressed that the area is not the destination – the city itself is – and a realistic mix of utilisation of the city assets must be utilised rather than attempt to create a separate destination.

## **5. STRATEGIC ISSUES**

### **5.1 Strengths & Weaknesses of East Belfast as a Tourism Destination**

The strengths of this area of Belfast in tourism terms are linked to its Industrial Heritage and its wider historic context.

The key strengths – which mostly relate to potential, are:

- The home of an industrial tradition in shipbuilding, aircraft, ropes and related industry which had a world-wide reputation;
- Titanic Heritage;
- Northern Ireland's principal Millennium project –Odyssey;
- Lagan regeneration;
- Parliament Buildings, Stormont Estate and Northern Ireland's History;
- Belfast City Airport;

The negatives impacting on the area's current tourism and potential are significant:

- No tourism tradition;
- A mixture of inner city deprivation, comfortable and affluent suburbia;
- Significant urban blight;
- Undeveloped 'attractors';
- Unwelcoming image in many areas;
- Limited 'sense of place';
- Limited accommodation;
- Lack of Arts/Entertainment and Venue.

This listing of negatives is not significantly different to those that would be found in parts of many post-industrial cities in Europe or North America and should not be treated as other than obstacles to be overcome. The objective must be to reduce the impact of the negatives and turn the potential of the strengths into reality.

Any destination or part destination will need to ensure that its appeal and experience match market needs in regards to:

- Distinctiveness and uniqueness;
- Provision of 'reasons to visit', including special interest facilities;
- Developing a range of accommodation appropriate to potential customers needs or linking in to adjacent accommodation.

## **5.2 Stand –Alone Destination or part of Belfast?**

In any area where a desire or need arises to grow a tourism business, the question must be asked if it is wiser and more effective to develop as a single tourism entity – a destination in its own right. If this is to be effective then there must be a clearly distinct product to market, a differentiated series of segments where expectations can be met in whole or largely, and the ability both financially and in practical terms to promote the area as a destination in its own right. This implies producing the whole gamut of literature, stand alone advertising and promotion and developing separate and distinct links with the travel trade.

It involves the development of a distinct brand for the area, something that is not easily done for a region or city, let alone a sub area. It necessitates discovering unique brand characteristics and identities, which alone could seduce potential customers.

Belfast Visitor & Convention Bureau, along with Northern Ireland's other regional groups has developed a professional brand – something that takes time, money, commitment and expertise. A brand within the brand is not appropriate at this time for East Belfast.

Whereas West Belfast has to some extent built a brand, because of its unique characteristics and identity, and has pursued clear market segments unique to itself, such distinction is not clearly identifiable for the East. It should therefore turn its attention to utilising, enhancing and integrating itself fully into the Belfast identity and 'offer' to tourists.

It must however be made clear that while a separate tourism brand is not appropriate at this time, this is not a reason to stop attempting to build an East Belfast identity. It is desirable to raise the profile of the area and to try to achieve a 'sense of place' over all the constituent parts. This in essence is the idea of promoting East Belfast to its own residents and getting them to accept its identity and understand its heritage and its makeup.

At a later stage of maturity in tourism, when and if its key attractors come to fruition, and when local brand promotion has been successful, it may then be appropriate to review the position.

To develop tourism within this parameter of no separate brand, still requires a commitment and action programme, which will be set out clearly within this report.

## **5.3 Market Opportunities and Challenges**

With the growth of short break city tourism and the increasing popularity of Belfast for such activity there is an opportunity for the East to share in the growth. As local and international coach tours weave their way through the study area, they examine the Odyssey as they venture towards Harland & Wolff with Samson and Goliath getting star billing. They then drive on towards Stormont and Parliament Buildings where they hear the history but do not enter. Then they recross the river and leave the East.

The challenge here is to get the coach to stop – to make it more than a drive through area. Only when the coach or the car stops are there opportunities to interact with the visitor and to ensure spend within the area.

As already noted the accommodation base is low within East Belfast. Those staying in paid for accommodation do spend within the area and it is clearly desirable to extend the accommodation base. However this must be economically viable and driven by market demand, which may have to be stimulated. It must not be driven by the 'me too' mentality.

Any new hotel accommodation will need a demand base driven by business and leisure usage – holiday visitor usage will form a low percentage of use in the early days. The lack of industrial development land in all of the East area mitigates against the likelihood of such development on any significant scale. Supplementary accommodation developed should on the other hand be encouraged. This will be addressed in the appropriate chapter.

**Table 503: Projected demand for Northern Ireland**

	Long Holidays	Short Holidays
Touring	✓✓	—
Countryside/recreation	✓✓	✓
Urban Tourism	✓	✓✓
Participant sports	✓	✓
Event attendance	✓	✓✓
Health / Fitness / Well-being	✓	✓✓
Special Interest	✓	✓

This table sets out the consultant’s assessment of the best prospects for Northern Ireland tourism itself. The interest for Belfast and the East - especially for short breaks – lies in Urban Tourism, Event Attendance and Special Interest. For long holidays the interest lies in tapping in to the general touring market.

The stakeholders within East Belfast see a clear market opportunity linked to the Industrial Heritage and historical interest of the area. They see special interest growth too, linked to people such as CS Lewis and Van Morrison.

The sporting opportunities linked to Odyssey are seen as a starting point, as are the events in Stormont grounds.

The domestic market, largely Greater Belfast based is a day trip market only, while short breaks will be aimed at Great Britain first and in time to the adjacent and accessible ROI market.

Overall market tactics will be integrated and be intrinsic to the BVCB Strategy.

#### **5.4 Policy Context**

The development of tourism in Northern Ireland is to **NITB’s Tourism Development Strategy (1995-2000)**. This document will not be relevant to the implementation of this report and the successor, on which NITB is now widely consulting, will be the principal framework for the next phase of tourism development. This will be linked to the EU Programmes now overdue for implementation, with Northern Ireland having lost its Objective 1 status. This means that capital grants for tourism development from that source are likely to be in much reduced supply. Until the Transition Programme and Special Programme contents become known it is not possible to predict their impact.

Of relevance too is NITB’s approach to developing regional tourism organisations. Its aim was to reduce the number of small players in the market place trying to attract visitors to Northern Ireland, avoiding wasteful duplication of effort and finance. For this reason the primacy of BVCB in the context of this study is paramount for marketing.

Sadly the decline of Harland & Wolff as an employer adds another possibility of policy development. Should the worst happen then it is conceivable that a task force will be created to bring about alternative employment. This would give added momentum to initiatives such as the Titanic Quarter and bring about pressure to fund key elements some of which may be tourism oriented.

## **6. GOALS, VISION AND STRATEGY**

### **6.1 The Goals**

As tourism in Northern Ireland and Belfast reaches a time of great opportunity, where significant growth in out of state visitors is expected, all areas will wish to share in this opportunity.

The objectives overall for tourism are:

- To expand tourism's importance in the local economy through increased earnings and job creation;
- Ensure the sustainability of the tourism sector;
- Optimise socio-cultural and quality of life benefits to residents.

These strategic goals are applicable to the study area and should be the driving force behind every related initiative.

### **6.2 The Vision**

The vision is to place East Belfast on the 'tourism map' and thereby create jobs, wealth and a destination to be proud of.

This part of a thriving city will feature major attractors, will look planned and well cared for, will have a lively cultural and entertainment base and will have a welcome for all visitors.

This vision is predicated on a set of core strategic choices, relating to:

- the type and scale of tourism desirable for the area;
- the market segments which best match the aspirations of the stakeholders; and
- the most effective marketing and development vehicle.

### **6.3 Guiding Principles**

The key guiding principles that should shape strategy and assist in the management of future development are:

**Sustainable Tourism:** This concept is to underpin all tourism development in Northern Ireland and is a worldwide principle. It is not just an environmental issue, it relates too, to the people of an area and their acceptance and agreement of development and utilisation of resources.

Developments that adversely affect the environment, which are short term, high volume and opportunistic in nature should be avoided. What is envisaged instead is an industry that will provide improved recreation/leisure facilities, enhanced living, working and learning environments and expanded career opportunities for residents.

Key aspects which require attention in order to ensure a sustainable tourism sector, include land use policies; management of the physical environment; conservation of natural and cultural heritage sites; development of market led products; and investment in human resources.

**Profitability:** Businesses currently in operation require an adequate profit to ensure continued expansion through investment. The relatively few hoteliers for example have struggled over many years and only now see reasonable returns emerging. Their continuing profitability must be balanced with the desire to see further accommodation development, while ensuring that growth for the area is not handicapped. Low price marketing strategies may not bring long-term benefit.

In the tourism sector the belief that supply will create its own demand does not have validity.

**Selective Investment:** It is seen elsewhere that growth in market share comes as a result of significant investment in product development and marketing. Investment needs to focus on gaps in the market – gaps that may be profitably filled. Future investment must be carefully targeted and selective – for either private or public sector.

**Targeted Marketing:** Here the area will depend on successful marketing strategies by BVCB and others. Their strategies must in turn be informed and influenced by the special needs and priorities of East Belfast.

The 'offer' from the East must be logical within the Belfast marketing concept overall and must enhance or complement it. The value potential of developments – large or small – must be appropriate in size and scale to the level of investment and be aimed clearly at a market with a high chance of success.

**Public/Private Partnership:** It is a truism that most successful tourism destinations have achieved much of their success through partnerships between the public and private sectors. A shared vision and combined energy focused on the goals of a buoyant industry can produce a successful result. Either sector focusing alone cannot bring about success. Given the scale of the issues and opportunities in the East, particularly around the shipyards, the partnership model is not just necessary but essential.

#### **6.4 Strategic implications of Goals and Vision**

Achieving the implementation of the goals and bringing the vision to reality will require significant action by stakeholders in both the public and private sector.

Those wishing to grow an industry have to organise themselves so as to be an effective voice for the area, and to influence those who can make strategic decisions in both private and public sectors.

There is no 'magic' solution, no short cut to both growing an industry from grass roots up, and in encouraging strategic investment in major projects with tourism benefit.

The key goal of increasing tourism's contribution to the economy of the area should be targeted as follows:

- Increased expenditure per visitor – providing opportunities to stop in and spend money in the area – through major and minor investment;
- Attracting existing city visitors to come into the area by providing information, reason to and means of visiting;
- Create events – sporting, cultural or heritage particularly in off peak season;
- Utilise the Odyssey as an 'attractor' for East Belfast prior to further development around H&W;
- Create an effective advocacy body for tourism.

## **6.5 Core Strategies**

Based on these guidelines and goals, four core strategies are proposed as follows:

### **Develop the Base**

Begin the process of building up a series of 'attractors' on both a small and large scale, and of utilising those now present to the benefit of the area. Continue the process of extending the accommodation base using an incremental approach.

### **Focus the Marketing**

Through a close working relationship with BVCB, integrate the East Belfast concept and products into the Belfast Strategy. This must be backed up with professional quality literature on an appropriate scale that is consumer driven.

As a subsidiary issue it is recommended that 'internal marketing' of East Belfast to residents and the rest of Belfast will help create a better sense of identity and start the marketing process.

### **A Quality Approach**

The provision of a welcome to all, of a well cared for environment, and of high standard information provision must have as its basis the need for a high level of visitor satisfaction. This must be coupled with training and skills that meet modern market demands.

### **An Advocacy Body**

The above strategies can only be implemented by the will and funding of the public, private and voluntary sectors. This will only come about if a body is in place, which can act as an advocate for East Belfast Tourism, acting in a co-ordinated way to give a single effective voice.

## **6.6 Opportunities**

While the next chapter sets out the main development needs of East Belfast it is worth highlighting here where opportunities for growth exist and the need to coordinate them. There is no simple listing of needs for tourism development – it has a complex matrix of issues from which opportunities arise. Examples here in the private sector are:

- Accommodation
- Tour guides
- Tourism linked retail
- Event creation & management
- Restaurant
- Entertainment venues
- Boat trips

From the voluntary or public sector are:

- Tourist information
- Sports and events

- Festivals
- Arts & Entertainment
- Attraction management & creation
- Tour creation
- Tourism marketing for the area
- Area ambassadors

The next chapters will spell out the needs and possibilities of these broad areas of opportunity and in the final chapter the issue of funding is addressed.

## **7. PRODUCT DEVELOPMENT**

In 1995 the consultants who completed the 'Belfast Tourism Development Strategy' wrote as follows:

*"Belfast is a 'maritime city' with a complex history of interest internationally. This sets it apart from other Victorian industrial cities and with the right mix of complementary product development, can develop a marketable set of Unique Selling Points (USPs) including the Story of Belfast, its high quality natural setting and its evolving artistic and cultural identity".\**

This paragraph encapsulates well both the need for a major tourism attractor in Belfast and the role that the city's industrial heritage can play. Much of this heritage lies to the east of the Lagan.

In this chapter each of the key aspects of product development for the area will be examined ranging from those with national / regional significance to those with a community emphasis.

### **7.1 Industrial Heritage**

The industrial heritage of East Belfast is synonymous with that of most of the City. Perhaps only in linen have other parts of the urban area got a more vibrant history. International recognition comes from shipbuilding and this theme will be developed in the course of this chapter.

Shipbuilding is a story in itself but associated with it are engineering, engine building and ropes. A generation after the Titanic era came World War II and the beginning of aircraft construction – with Shorts producing the Sterling bomber, the Sunderland flying boat and other aeroplanes, which fascinate enthusiasts around the world.

Close by, the Sirocco Company produced engineering equipment for the empire – principally its famous tea drying and processing machinery. Tobacco processing also became a key industry in this part of the city.

In analysing the significance of these elements of the industrial heritage the following table has been developed:

**Table 701: Analysis of Tourism Value of Industrial Heritage Elements**

<b>Activity</b>	<b>International Appeal</b>	<b>Specialist Appeal</b>	<b>Impact</b>
Shipbuilding	High	High	High
Marine Engineering	Low	Medium	Low
Aircraft	Medium	High	Medium
Other Engineering	Low	Low	Low
Tobacco	Low	Low	Medium

*Source: Consultants findings based on experience and observation*

Shipbuilding emerges clearly in this analysis as the most significant industry in tourism terms as an attractor. However it must be emphasised that this is solely due to the current 'industry' created by RMS Titanic and the recent movie. The romance, the tragedy, and the search for the ship – coupled with the bringing to the surface of many artefacts have created worldwide interest, which can be capitalised on.

Only twenty years ago in an early study of tourism potential for Belfast, it was concluded that to use the Titanic story would be in 'bad taste'.

To most tourists, shipbuilding itself is not of any substantial interest and may seem incredibly dull – it is the romance of the passenger liners and of battleships that can stimulate interest. Here, there is a unique opportunity to develop a world-class attractor.

Other forms of engineering hold little attraction for tourism on any scale but can provide interesting add-ons to an exhibition. Aircraft on the other hand hold an appeal to many. Here there is a problem as no Short Sterling exists today and the chance of bringing back a Sunderland is very low indeed. The basis of a genuine attractor is therefore limited even if the Ulster Folk and Transport Museum's first-class collection were available. Realistically it will be an add-on to the maritime project.

Finally tobacco may be considered. It has been the source of major employment in Northern Ireland and though socially unacceptable by and large today, it could nevertheless hold an appeal for some. This may be in the form of an educational exhibit that is not seen as promoting the habit.

## **7.2 Titanic Quarter**

Arguably the largest and most significant development opportunity for Northern Ireland, Belfast and East Belfast, is encompassed in the great stretch of land and buildings now entitled Titanic Quarter. This key land bank runs from the Odyssey and Abercorn Basin (Map Appendix) along the spine of Queens Road to the entrance of H&W Ship repair Services at East Twin and Wolff Roads. It is a huge area of 110 acres embracing historic H&W buildings, dry-docks and major industrial buildings.

Already the Northern Ireland Science Park has been located at the seaward end of the Quarter. This is a major Government initiative whose objective is 'to create a self-sustaining, internationally recognised Science Park which is both a commercially and research driven centre for knowledge based industries'. This will be the cutting edge of 'high tec' development in Northern Ireland and is an excellent capture for the area. By 2003 over 20 acres around Thompson dock will be integrated into the Science Park, with a potential for 2000 jobs. While it may seem a little distant from tourism it must be remembered that it is to be international and of top quality. It will therefore help enormously to lift the area and to provide a business clientele for future accommodation developments.

This science-based development fits in well with the overall idea that Titanic Quarter should be the home of knowledge-based industries.

H&W is currently working on its rollout plan for the Quarter. Many are interested in this and the over arching concern for the whole future of shipbuilding. It is unclear at the moment what the end result will be, but whatever it is, it remains fundamental that the Titanic Quarter Master Plan will be of enormous significance to the area and its residents. Concern has been expressed to the consultants that an end result, which brings high tec jobs and unaffordable apartments, will do little for the economic well being of East Belfast per se. Master Planners are soon to be appointed and this issue must be considered.

From a tourism perspective the end result needs to be a vibrant blend of attractors, of 'real heritage' and of a living community. It must be a 24-hour community with a welcome for visitors.

The key for tourism is the reason to visit and simply being Titanic Quarter is not enough alone. This is where the major opportunity lies – the opportunity to develop a themed heritage attraction based around the Titanic Story but blended with the story of shipbuilding, of ships and the aircraft.

For this development to become a must visit attractor for Northern Ireland it will have to be conceived with imagination and carried out on a major scale. It will have to match the ambition and delivery of Odyssey and be on a par with other large scale industrial heritage projects in Great Britain – such as Beamish, Styal Mill, The Big Pit or Blaneau Festiniog in Wales devoted to coal and slate mining.

This is not a new concept and valuable outline work has been undertaken by Belfast Industrial Heritage Ltd for example. Belfast City Council too has considered a Titanic theme for a key attractor for Belfast. They are shortly to go to tender for a feasibility study on such a project, which may or may not have a Titanic Theme and which need not be in East Belfast at all. H&W themselves have formed a working group with MAGNI (Museums & Galleries of Northern Ireland) to capitalise on the Titanic Conference held last year. Without a doubt the scale and possibilities of this project will require a dedicated expert team coupled with commitment at Government level to deliver.

The vision for this development should embrace the idea of a theme park based on the Titanic herself and the associated industries. It should include:

- Part Reconstruction of RMS Titanic – cross section
- Authentic visits related to the construction
- ‘Genuine’ interior reconstruction
- Story of Other Ships
- Aircraft Hall & Story

Linked to a visit should be the nearby IMAX theatre at Odyssey running the IMAX movie of the Titanic, and possibly the full-length movie showing daily in one of the associated cinemas.

The scale of what is envisaged is significant and must approach the £50M mark over a period of years. This scale of investment is unlikely to achieve a commercial return and there will therefore be the need of ongoing subsidy from the public sector. Nevertheless it must be considered as a serious proposition both for its regenerative possibilities and its preservation of a world -class heritage for the country.

In addition to this key provision, Titanic Quarter is also expected to host a marina in the Abercorn Basin and hotel developments. The area is also expected to be the permanent home of HMC Caroline (dealt with in the next section), which becomes the basis of a maritime museum collection.

One change, which deserves close consideration, is to examine in detail the feasibility of making Titanic Quarter the cruise ship terminal for Belfast Port. This is not to suggest building a cruise terminal as potential numbers could not justify such a development (the consultants concluded in a separate study that Dublin could not justify a terminal even with its much larger numbers of cruise ships). Instead it is to suggest utilising quay space near the Titanic Slipway as a marketing USP for visiting cruise ships. Now that the ‘bad taste’ issue has been set aside, the ‘draw’ of tying up at a themed Titanic Quay should not be underestimated. Clearly there a number of issues to be addressed but could be overcome in the medium to long term.

In summary the significance of the Titanic Quarter is enormous for tourism development in East Belfast. It must be integrated into the Master Plan and must receive full consideration in long term planning involving many Government Departments and Agencies.

In addition to Industrial Heritage the concept of understanding the **Social History** of the area is worthy of some consideration. The idea of conserving McMaster Street has been looked at but there is an issue concerning the juxtaposition of preserved heritage aimed at tourism and a residential area. The idea of one house being purchased and returned authentically to turn of the century appearance may be explored, but it could lack sustainability as a stand-alone attraction. A linkage with Titanic Quarter in some fashion would be desirable.

Some are attracted to the idea of using the shipbuilding tradition of the area to undertake a major project to build a **replica sailing ship** of the last century. This has been done in Tralee of late and at some cost. It clearly would have an attraction but it needs a thorough feasibility study and a clear funding line if it is to avoid the problems incurred by similar projects elsewhere.

### **7.3 HMS Caroline**

One of the landmarks on the Lagan and a resident of Titanic Quarter is HMS Caroline, currently a training ship of the Ulster Division of the Royal Naval Reserve (RNR). Built in 1914, Caroline moved to Belfast in 1924 and has been a resident of the port ever since. It is now likely that by 2006 a new shore base for the RNR will be built and Caroline will be "reduced to disposal". If she is to become part of a maritime feature or museum in Titanic Quarter then work will have to begin in the next two years to prepare for the disposal, as others may be seeking to move the ship elsewhere.

Curiously as part of the 2000 Belfast Festival the ship was used as a venue for an event on a number of nights. While this is in itself encouraging for the area, it is likely that the 'drill hall' on the ship would be removed as part of a restoration process. Such a use would therefore not be feasible in the longer term.

The significance of HMS Caroline is that she is the only survivor of the Battle of Jutland and the only example of a warship of the type and of British construction of that era. In a 1996 report carried out on her on behalf of Belfast City Council it was concluded that she has 'a European, if not world heritage status' and 'it would be an internationally significant loss if her long term preservation cannot be assured'. It is understood that she is now listed on the Historic Ships Register.

There is therefore a clear opportunity for Belfast to acquire Caroline and to present her as the centrepiece of a maritime exhibit.

The 1996 report spelt out the implications of such a move:

- Heritage vessels are rarely presented as stand-alone attractions
- An average of 100,000 paying admissions could be expected
- Running costs would be £500,000 per annum
- A deficit between £200-400,000 pa was likely
- A capital cost of £2M was necessary to make the ship accessible and partly restored
- A lead agency was needed to move on with a detailed feasibility study.

Nearly five years on the same position prevails, as the 2006 disposal date looks realistic. As then there will be a 'hue and cry' if the ship is thought to be moving to the Imperial War Museum and to another port. But as the 1995 figures above indicate, a decision to acquire her cannot be taken lightly – historic ships are expensive to run and maintain and projects often end in tears, with a rusting deserted ship, only wanted for towing to the Far East for scrap. This would bring disgrace on everyone concerned.

If she is to be sought for Belfast it can only be as part of a thorough, fully funded and professional project. A decision on this will be needed in the next two years.

### **7.4 Parliament Buildings**

On an elevated and commanding position above East Belfast sits Parliament Buildings – Stormont. It is somewhere that tour coaches head for and tour the grounds, and where Citybus Tours pass through. The grounds are freely accessible and are used mainly for recreation. In the past two years they have also been the superb location for a Pavarotti Concert, a Michael Flatley Concert and a Festival of Motor Sport. All of these innovative uses have helped make East Belfast better known and accessible.

However it is the Parliament itself that is the tourist icon of most value in any democracy. Capital cities such as Madrid, London and Dublin all make available visits to their parliament with varying degrees of availability and length of queue.

In Northern Ireland the home of the Assembly may only be visited with the sponsorship of a Member. This is freely given and many visits take place, sometimes for conference delegates or other well planned occasions. However tourists wishing to pay a visit cannot do so as there is no time or system in place for this. The 'party line' is that the building is too busy to accommodate visitors.

Assembly Members from East Belfast do not share this view, and consider it reasonable to get the Assembly Commission to examine the position. Belfast City Hall is open for tours at 2.30pm on weekdays, and an arrangement such as this seems perfectly feasible. An arrangement with Citybus for its fixed capacity tours would also seem quite possible to arrange.

At Appendix 3 is a press cutting from the Travel Section of the Sunday Telegraph of October 8 2000, which makes clear how attractive a tourism venue Parliament Buildings could be.

This issue should be considered a priority.

## **7.5 Other History**

Within East Belfast lies Craigavon House, which has great historic significance to many Unionists. There the Ulster Unionist Party met for the first time, the Solemn League and Covenant was first signed, and which became in due course the UVF Hospital following World War 1. Some community groups consider that the buildings are of great historical significance and should become a visitor centre highlighting this historical sequence.

However there is not a consensus of opinion on this and at this stage no serious bid to follow up the proposal. Capital costs would be high and revenues low in a project which some may see as exclusive. With a hospital in the grounds, the co-location of a tourist attraction would be a difficult proposition to manage.

Unless the owners and a funded group come forward it is difficult to see this idea making headway.

## **7.6 Culture & Arts**

In the recent Belfast Arts Awards 'The Wedding' Community Play conceived, set and performed in East Belfast won two major awards. This is something to be proud of and on which to build for the East. Although Stormont grounds have seen performances by Pavarotti and Michael Flatley in the past two summers, there has been little else of artistic significance in this part of Belfast. There is little or no artistic tradition and no serious attempt to develop the arts until of late.

The whole area lacks a major performance space either indoor or outdoor. Stormont is limited in use and expensive to mount productions. (Both events referred to above were loss makers). The Odyssey Arena is of course opening by December 2000 but being the largest arena in Northern Ireland it will house only large commercial concerts as well as its core ice hockey programme and occasional athletics. The Odyssey Arena will bring visitors into the area for its events, but is unlikely to be the source of the development of an arts tradition. This will be a long slow process already begun by some dedicated people. It is unfortunate that the East Belfast Festival has stumbled. It must be revived and provide at least a week of activities of interest to the visitor from Northern Ireland and further afield.

The West Belfast Festival need not be copied but it presents a model of how an event may be grown to achieve a high profile and substantial support. A later chapter will discuss delivery mechanisms.

Community Theatre, Carnival Arts, and Street Art all have a role to play in changing perceptions and attitudes, which may brand the Inner East as a cultural desert. Further out are to be found some Church drama groups and little else.

A serious attempt should be made to create, fund and run professionally an Arts Festival, which can in time grow, to something of significance, utilising the talents and experience that clearly exists. This will be of benefit to tourism directly and will soften the image of the area.

**Entertainment** is a perennial issue in developing an area for tourism. Whatever part of the world is under the microscope this is a key issue. Things to do in the evening often revolve around the liveliness and hospitality of pubs, where live entertainment reflecting the culture of the area may be experienced. Northern Ireland as a whole is poor in this regard, but the centre of Belfast and West Belfast can provide a good number of such venues. Visitors to the island expect to find Irish Music in pubs and do not understand the cultural divide that exists in many places.

Few pubs in East Belfast seem to welcome visitors or attempt to lay on any form of entertainment. This issue of what is the musical heritage is important if even one or two venues are to grow a tourism business. While live entertainment has become the forte of

many pubs and clubs on the 'Golden Mile' in the City Centre there is no reason why specialist cultural entertainment cannot be developed elsewhere. Consistency of quality and provision are the keys.

**Artistic Themes** East Belfast has two figures with a high standing on the world stage of culture and the arts, and both could not be more different – CS Lewis and Van Morrison.

Both feature extensively on the excellent East Belfast website and 'trails' may be followed. This will be touched on again when marketing and visitor servicing is being considered, but the question at hand is whether some permanent centre or exhibition should be developed for one or both.

CS Lewis, with his childhood in the area, his church links and the wardrobe sculpture at the Arches (reflecting for those unaware, his book 'The Lion, the Witch and the Wardrobe') is a figure of distinction that it is right to recognise. His followers are dedicated but do not exist in numbers to create and run a viable CS Lewis centre. It is better to consider a permanent exhibition of modest scale, being located in an existing public building such as Belmont Primary School. The availability of qualified guides to lead regular scheduled walks around the places of relevance is also important.

Van Morrison is arguably from another world altogether and is still a living legend. Here too the potential is modest, as other parts of Northern Ireland would feature in any pilgrim's tour. The idea of a visitor centre would probably upset this famous musician – instead he should be used to inspire and motivate an interest in living arts, which could be shared, by local and visitor alike. Is it too big a leap in the imagination to see ahead a Van Morrison Centre of Contemporary Arts? This concept, which needs considerable development, could link East Belfast Arts to the tourism industry very significantly.

It could make the East an 'in' place which is an important factor in successful tourism.

## **7.7 Accommodation**

In Section 3.2 the current stock of accommodation using a very generous definition of East Belfast is set out. The number of hotels, guesthouses and B&Bs is low, but not exceptionally so in comparison with many inner city or suburban areas. The reasons related to this have been set out in 3.3. Here the opportunities are examined.

The key to successful accommodation development is both to anticipate demand but not to provide it too far ahead – that route leads to financial disaster.

Growth opportunities in the area will be linked to:

- Titanic Quarter
- Odyssey
- City Airport
- Dundonald Ice Bowl
- Eastbank (a regeneration site based on the Sirocco works)

The scale of such developments and the star rating will be varied with opportunities more likely in the travel lodge type of property. One 4/5\* hotel can be envisaged around Odyssey/Titanic Quarter but is some years down the road. When the planned for 8000 jobs are identified and the high tec international firms are coming in, there will be a clear market need. The airport area and the ice bowl are more likely to see travel lodge or inn developments, linked to the transport interchanges and arterial routes.

Over a five-year period, if the major developments in the H&W area take place then some 300 hotel rooms are likely to be necessary across the area.

Guesthouses and B&Bs are easier and less costly to put in place. As already discussed certain types of houses are more popular and marketable for these uses, both traditional and

modern. Proximity to restaurants and entertainment is desirable, as is on site parking or proximity to good public transport.

Local tourism groups working with the accommodation advisory team in NITB can encourage the growth of such accommodation. This has been done successfully elsewhere and provision of information is a key need. Training courses for aspirant operators are also necessary and a clear understanding of running a business. This is a role, which a local tourism group can motivate and coordinate.

There is scope to increase the number of establishments in the area by 50% at least.

With the continuing popularity of backpacking and low cost hostel accommodation there is scope for a development of this nature on the East Bank of the Lagan preferably close to Central Station and the city centre.

While some self-catering accommodation is located in the area it is largely apartments located in Laganside blocks. While they may have some tourism letting, they are ideal for longer-term residents. This is not a growth area in the foreseeable future for Belfast overall.

## **7.8 Infrastructure**

As described earlier the study area is a mix of blighted land and leafy suburbia. The Belfast Regeneration Office's remit covers the inner element and addresses the issues of deprivation, blight and planning. Many feel that the blight caused by uncertain road plans has severely damaged the area over the years. The visual evidence of this is clear to see. This coupled with the decline in traditional shopping and streetscapes, has left a legacy of poor looking or derelict buildings. The overall impact is a feeling to the visitor that the area is in terminal decline. This will happen only if the visitor ventures in having navigated through the bottom of the Newtownards Road.

The Laganside Corporation also has a remit for part of the area and has launched the Eastbank scheme. This development will be of significance in 'bringing the city centre across the river' - an area running from Queens Quay through to the Albert Bridge and touching both the Lower Newtownards Road and Short Strand.

It is to be a new community, a platform for growth and inward investment and a new place in the city. This is a grand project and its concept, which includes hotels, restaurants and leisure facilities, has exciting prospects for the East. This idea of linkage is important following the linkage across the river that Odyssey brings. If both banks of the river can be seen as 'must visit' parts of the city centre then considerable progress in tourism can be made.

Coupled with this will be a major improvement in the road pattern in the area, which should encourage more access into rather than bypassing the area.

**Shopping.** This is a highly charged subject with the D5 site being an East Belfast as well as a City Centre issue. This report is not a vehicle for comment on that issue. However it must be stated that the decline of the traditional shopping areas, as in many towns and cities in GB and Ireland leaves little reason for a tourist to explore. The inevitable shopping centre will have the usual range of shops and no 'sense of place'. In the East it may be possible through astute management and encouragement to start a revival in Bloomfield Avenue and develop it as a centre for speciality shopping. Hollywood Arches area could also be focused on as a key centre of the area, giving it something of an historic feel. The Hollywood Arches Feasibility Study update of May 2000 reflects this potential.

While these are clearly only initial proposals, many have indicated support and see the regrowth of shopping areas, attractive to locals and visitors as highly desirable goals.

## **8. MARKETING APPROACH**

### **8.1 Objectives**

In Chapter 5 the case was made that East Belfast is not a destination in its own right and cannot therefore be seen as a brand or be promoted successfully on a stand-alone basis. It must be positioned as an attractive and interesting 'must visit' part of Greater Belfast, on which there is plentiful information, which is easily accessible and where there is a warm welcome.

This positioning relates to the Goals of the Strategy which it will be remembered are:

- To expand tourism's importance in the local economy through increased earnings and job creation
- Ensure the sustainability of the tourism sector
- Optimise the socio-cultural and quality of life benefits to residents.

In short the objective for East Belfast is to obtain a higher profile in the marketing of Belfast thereby leading to a higher propensity to visit. It must be borne in mind that this will only be successful if it is accompanied by setting in place all the other requirements for a successful tourism strategy.

A secondary but linked objective is to ensure the provision of information to prospective or existing visitors in a cost effective but impactful way.

Finally there is the need to market East Belfast to its own residents and to the rest of the citizens of Belfast. While this strictly falls outside the tourism definition it nevertheless is a desirable action if it is to help develop a sense of place, a sense of pride and bring in spend and visitors from other parts of the city.

### **8.2 Positioning**

Currently Belfast Visitor & Convention Bureau as part of its remit for the city markets East Belfast tourism. BVCB provides a range of quality literature, runs the Belfast Welcome Centre, attends trade fairs and travel shows, advertises where appropriate on a stand-alone basis or with NITB. In short it does all the things a professional destination-marketing organisation should do. It is also a membership organisation and by virtue of the small tourism base of East Belfast will have few members from this area. This in turn gives a lower 'voice' for the area. This is not a criticism of BVCB; instead it reflects the reality of the situation.

BVCB has also developed the Belfast Brand after considerable research and testing. The brand is encapsulated in the strapline: 'Touch the spirit, feel the welcome'. In the brand jargon this conveys the idea of a city waiting to be discovered, with a tone that is optimistic, inclusive, warm and informal. This brand construct includes East Belfast and is not unhelpful to the area. Indeed it does say those things that can be accepted for the area and it's people.

The brand brochure of BVCB makes the point clearly "In Belfast City we have a lot to be proud of and it's important we all use the same tone of voice, expressing the same sentiments and revelling in the same sense of celebration about the value of our city".

The Brand Diagram (set out at Appendix ) for the Belfast Brand sets out the 'pillars' or essential elements of the brand, the 'plinth' with the central thought at it's heart, and the 'dome' which suggests the tone of voice that should be used in messages – in this case *informal, inclusive, optimistic, warm, wry and genuine*. All of these pointers need to be adopted by any message that east Belfast wishes to put across. The Belfast brand should not be dismissed as marketing mumbo-jumbo, instead it is clear available guidance that should be adhered to if tourism potential is to be maximised. In short the messages from east Belfast and their presentation must use the same brand values and the same tone if they are to be recognised as an integral part of the process.

### **8.3 Integration with BVCB**

The need to integrate literature and promotional messages with the Belfast Brand has been set out above. Similarly there is a need to work intimately with BVCB itself. Its organisation, while member driven, gives professional staff in the marketing and promotional field the responsibility of ensuring that the City itself, and a wider area, benefits from tourism and specifically the results of its marketing drives.

BVCB employs 8 marketing staff and will have a further 7 full time equivalents in the TIC or Welcome Centre. It deploys a marketing budget of £500K. It is important therefore that East Belfast organisations with a tourism interest work with BVCB to both enhance their marketing knowledge and to understand the needs of the market. If a tourism officer were to be employed for East Belfast this person would work intimately with the Bureau.

The staff of the Visitor & Convention Bureau work on a two-way basis of marketing and selling products that they understand and in which they can have faith on a quality level. Here too there is important work for an East Belfast champion.

The objective should be to ensure that BVCB has an up to date knowledge and understanding of the East product and its potential, and will ensure that it is well represented in brochures, in advertising, in familiarisation visits by journalists or travel agents, and while at promotions or trade fairs.

### **8.4 Literature Requirements**

There are two distinct uses of tourism literature. The first is to interest the consumer in a particular place or product. The second is to inform a visitor to an area of the range of facilities available, how to access them and thereby keep the visitor in the area for as long a time as possible.

In destination marketing there is a plethora of literature always available, which is often expensively and handsomely produced. Always it must compete for shelf space wherever it is distributed. Rarely will a travel agent stock such literature, as every inch of rack must make a profit from commissionable sales. Destination literature must therefore be in the ambit of Tourist Boards and VCB's and they too have to prioritise what they can ship, stock and distribute at what price or give away.

It is a truism that most travel literature is put in a bin within 24 hours of the consumer receiving it. The choice of print necessary and its distribution channel is therefore of critical importance.

Currently East Belfast has no dedicated tourism literature, but does have tourist information and suggested itineraries on the East Belfast.com web site. This will be referred to later.

As a first step it is recommended that two pieces of literature are produced – one for widespread consumption and one for the more committed customer.

- A4 Triple Folded Flyer. This piece should be produced on a wide circulation and should highlight the key attractions of East Belfast. It should include a schematic map – as the BVCB main guide map only covers the City Centre. It should be colourful and fit with the Belfast Brand. Its objective is to draw attention to the fact that east of the river may be found a number of attractions and trails. It should not contain advertisements as such.
- A4 or A5 Guide to East Belfast. This is the key piece of literature for a serious potential visitor or a committed visitor. It may be similar to the recently published 'Welcome to West Belfast' – a 64 page detailed guide to that area. As it is bilingual it is likely that a single language production would run to 32 pages of A5. It should be comprehensive in its treatment of products, events

and places. It should contain advertising but most importantly it should contain walking trails, motorists trails, all preferably themed around a product or indeed person. Its map must be accurate and attractive and the visitor should wish to keep the guide as a souvenir and something to be used again.

While a rough costing would indicate a unit price of say 40p per flyer, the main guide would cost perhaps £1 - £1.50p per unit. Literature is a costly business and the target market and distribution channel must be clear. This indicates the importance of BVCB links as the style of literature; the size and format need to conform to accepted norms. Failure to conform can mean no suitable racks in TICs to stock the literature, and too heavy a postage bill for distribution. These simple and apparently obvious rules need to be conformed with if the desired result is to be achieved.

The literature described above can be used or adapted for local resident use, indeed they may be a source of revenue to ensure that literature is reprinted regularly without unused stocks having to be pulped. The temptation to provide extensive amounts of free literature should be avoided – most free literature is dumped within a short lifespan. Purchased literature or literature ordered by telephone, post, or web can be classified as necessary marketing spend.

Bearing in mind that excellent information can be downloaded from the web, expensive printed material must be husbanded carefully and this is best done with a small charge imposed especially for local use.

## **8.5 Website**

The EastBelfast.com website is comprehensive and kept up to date. It includes sections on 'Going Out', 'Preserving heritage', 'Shopping', and 'Visiting'. Here it gives connections to NITB, Belfast City Council and some commercial sites. It is the best available site for CS Lewis or Van Morrison fans.

While it has hot-links to NITB and BVCB there are no reverse links. This may be a commercial decision by those site operators or it may reflect a lack of co-ordination.

With the growth of the web and of branded marketing it will become necessary for an east Belfast site to be formatted on the Belfast brand and to receive reciprocal traffic. Again a tourism development officer could deal with this issue.

Interestingly a search engine produced as its top result in East Belfast, when these words were entered separately – St Mark's Dundela webpage and its CS Lewis information. The EastBelfast.com site could only be found when the unseparated word was searched for. This is restricting access to this very promising site.

## **8.6 Eastlife**

This magazine that has had one issue produced to date, provides an interesting perspective on the area for visitor and resident alike. Issue Number 1 has covered very interesting topics and it may be difficult to replicate this standard of journalism regularly.

As with any magazine the target market must be clearly defined and there may be some more work to do in this regard. From a tourism perspective an annual issue is acceptable, provided it is colourful, interesting and up to date.

This magazine could be tied in with the local promotional concept and used to accentuate the identity of the area. A change of print format might be necessary to allow the production run necessary.

## **9. QUALITY ASSURANCE, WELCOME & TRAINING**

### **9.1 Quality Assurance**

In any area which hopes to attract tourists there needs to be an adequate range of natural resources – of things to do and see – a range of accommodation and other visitor services. These elements have been assessed in previous chapters. These however are underpinned by the quality of the experience which in turn depend on:

- The way in which the service is provided and delivered; and
- The maintenance and standard of the environment.

Service It is a truism that the standard of service provided in all service industries continues to have to increase to meet customer expectations. As consumer champions point out customer rights issues and as travellers become more worldly wise, second best simply will not do.

The hoteliers in East Belfast have recognised this through the use of CDP (Company Development Programme) sponsored by T&EA and through IIP (Investors in People). The successful results after such programmes are clear to see and the further use of such tools is to be recommended.

On a broader training front the use of the Welcome Host Programme is to be highly commended and encouraged. It covers the widest possible range of people who can come in contact with visitors and gives them an insight into visitor needs and expectations and how to deal with them. The initiative of Belfast City Council and the Community Groups in pursuing Welcome Host is most valuable.

Service for tourists is not just an issue for hotels but is equally important for restaurants, pubs, taxi drivers, banks, historical premises etc. At the airport, bus station and railway station the traveller is most vulnerable and in need of helpful information. The standard of information and orientation available, the level of assistance and friendliness may be the factor that encourages the visitor to stay or move on. This is especially so in Northern Ireland where worries over personal safety may be constantly present.

Environment What the tourist sees and experiences of the physical environment has a primary influence on his/her views of an area. The physical aspects seen include:

- Landscape, riverscape, urban spaces;
- Parks, open spaces, woods and public land;
- Public roads and street furniture, car parks, lay bys, pavements;
- Historic sites and buildings;
- Buildings of entertainment and recreation;
- Retail outlets;
- Visitor accommodation;
- Transport termini and reception areas.

Urban areas generally have problems under many of these headings and where there is urban deprivation and community strife the problems increase. Planning blight caused by thirty years of road lines has added to the environmental problems of this whole area.

This report can only highlight the damage that will be caused to tourism potential by environmental matters. The vision for the area must embrace an environmental outcome, which will be pleasing to resident and visitor alike. At present the area overall ranges from bad to very good, but the whole needs high standards of care and presentation, not just the more affluent areas.

## **9.2 Welcome**

The Welcome to an area is in many ways a nebulous or intangible thing. It can range from the US idea of 'Have a nice day!' to the residents of Bath hosing tour buses. In Northern Ireland it is particularly important because of the legacy of years of violence which leave many visitors somewhat apprehensive. This coupled with a Belfast Brand, which claims 'feel the welcome' means that the welcome must be all embracing and inclusive.

Areas wishing to attract visitors cannot pick and choose whom they wish to welcome – at least in a free society. For most of East Belfast this means understanding the apprehension that may be caused to southern Irish visitors – a large proportion of the Northern Ireland total – through anti Irish graffiti and displays of flags by para military groups. Add to this a propensity to stone tourist coaches with Irish registrations – which probably carry US or Canadian visitors (most coach tours are all Ireland and begin down south) and an appearance of a no-go area emerges. A self-imposed ghetto is created which visitors will simply not risk entering.

This is not to suggest that the cultural or political heritage of the area should be removed or played down. Wall paintings are indeed attractions in themselves but they need to be accessible to the independent traveller who should be able to view them and not feel at risk. There is no point proclaiming a political message if only a close local audience can see it. The example of other areas should be considered where their wall paintings are on the tourist routes but all flags and kerb painting has been removed. A wide international audience now receives the political message and probably empathises with its authors.

No amount of Welcome Host training will assist tourism if the visitor will not enter the area.

Similar consideration should be given to journalists and other media people who naturally respond to a welcome rather than a lecture about their shortcomings. This lesson is being learnt but must be borne in mind by all particularly at times of tension.

Another aspect of welcome that should be considered is that of Tourist Information. BVCB runs its Welcome Centre in North Street although it will move to Donegall Place next year. NITB coordinates a Tourist Information Network across Northern Ireland which operates to high standards and which links into the TIC system of the UK and Ireland.

Within the study area Castlereagh Borough Council operate a Local Information Outlet at Dundonald Ice Bowl. The LIO is the reduced version of a TIC and one has recently been established on the Falls Road.

Detailed guidance on the requirements for an LIO is set out in a guidance note from NITB.

It would be appropriate to consider an LIO for the Inner East based around the Partnership office. Belfast City Council would be the 'parent body' for this initiative.

## **9.3 Training**

East Belfast has a first class asset for training in the hospitality sector in Castlereagh College of Further Education.

It provides opportunities for acquiring NVQs and A Levels in a range of tourism related subjects. Tailored courses can be provided on areas such as Marketing for B&Bs, Customer Service, Tour Guiding and Welcome Host.

This is a training facility, which can be utilised even more by the community. It is accessible and open to views on courses and their content. Furthermore its lecturers are responsive to new ideas and needs.

No evidence has emerged of any critical shortage of staff in the area, which can be resolved by a training course. The Belfast area is well provided by training for the hospitality and tourism sector and there is no constraint on take-up of places by those from the area.

Where any shortage arises it stems from the overall issues related to the perceived unattractiveness of the hospitality sector. This issue is being addressed by a number of bodies and organisations such as Hospitality Matters.

Welcome Host has already been referred to and it must be considered as a training opportunity for anyone likely to be in contact with visitors. Its take –up should be actively encouraged.

The proper utilisation of the training resources and needs of the area is something that must be addressed by those with their finger on the pulse of local businesses. It will be a constantly changing pattern of need and needs to be monitored on an ongoing basis.

This will be an additional role for the 'tourism body' which is addressed in the next chapter.

## **10. ORGANISATION**

### **10.1 Local Involvement**

Tourism in an area can only flourish with the active support and encouragement of local people. This is a principle of sustainable tourism and is a self-evident fact where tourism is flourishing. The benefits of tourism must be seen to flow into an area and assist in the creation of sustainable jobs.

With a low business base in tourism and with two local authorities being responsible for part of the study area, East Belfast does not have strong advocates or champions of tourism. There is however considerable interest in the subject and a desire to succeed for a number of groups. Issues such as industrial heritage do inspire many and give a pride in achievement that they wish to share. The East Belfast Community Development Agency is beginning a process of involvement in tourism and the East Belfast Business Initiative has brought about this report. Continuing involvement by these bodies will be necessary to make progress.

### **10.2 Effective Influencing**

A determined group of people can achieve much within the democratic system by ensuring that their particular interests are at the centre of others thoughts on a regular basis. The phrase 'a squeaky wheel always gets oiled' springs to mind. No matter how effective local representatives are on an individual basis, they inevitably "firefight" on issues, unless there is a forum where their efforts are to be concentrated. Local representatives need to have cases prepared, need to have 'ammunition' provided, and be reminded regularly to give an issue a priority.

The recommendations in this report are essentially at two disparate levels. The first is at community level where individuals and groups need to provide a united voice on tourism issues and help develop the product and the welcome. At the other end of the spectrum are recommendations that involve major public expenditure and associated issues. The latter will need to be championed at national level where competition from other projects and schemes will be fierce indeed.

A coordinated strategy to support such investment and development will be needed on a sustained and consistent basis.

A tourism group for East Belfast is therefore necessary and needs to be supported by a staff member with knowledge of the subject and the ability to get things done. This arrangement should be within the East Belfast Business Initiative ambit and this will be looked at more closely below.

### **10.3 Relationship with BVCB**

As examined in the Marketing Chapter, BVCB is the organisation charged with the marketing and promotion of all of Belfast and therefore there must be a dialogue with the Bureau by 'the East'. This dialogue will be two way and will have the objective of keeping both sides informed of developments in tourism matters.

BVCB is happy to attend meetings of a tourism group in East Belfast and to work on a professional basis with interest groups. Clearly this will be most effective if there is a single entity to deal with. To maximise the advantage of the relationship a member of staff at EBBI, dedicated to tourism would be essential. This would help translate words into action.

BVCB already works positively with the West Belfast Partnership Board and its Community Tourism Initiative. Meetings are attended by BVCB staff and there is a two-way dialogue on matters of interest – common or otherwise.

The opportunity is there for East Belfast to develop a similar form of relationship. The issue of two local authority areas is of no relevance, as BVCB operates outwith such boundaries and is based on the geography of commerce rather than politics.

#### **10.4 Organisation & Structure**

The proposal put forward is that under the aegis of East Belfast Business Initiative, a Tourism Forum is created. It should be properly constituted and consist of representatives of community organisations, private sector and relevant public bodies. It should meet regularly and have a BVCB staff member in attendance at its meetings.

Its objectives should be:

- To enhance the profile of tourism in East Belfast
- To act as a champion for investment in tourism in the area
- To encourage the regeneration of the area for and through tourism
- To act as a conduit for environmental awareness and welcome issues
- To channel the enthusiasm of community groups into cooperative undertakings for tourism
- To facilitate the implementation of an action plan for tourism
- To liaise with product providers on matters of standards and of need
- To work with BVCB on the promotion and marketing of the area
- To provide a Local Information Point for tourists
- To provide a website for tourism linking in with BVCBs
- To encourage and coordinate an East Belfast Festival
- To work with other community groups to achieve a common purpose

The prerequisites for this Forum to work effectively are:

- The appointment of a high profile Chairman who can have influence with the Councils and with relevant public bodies.
- The appointment of a Tourism Development Officer as part of the EBBI staffing complement.

As a key role of the Forum is to influence others then it is essential that a dedicated and knowledgeable Chairman be found to drive the organisation forward. Preferably the Chairman should be a member of the Board of BVCB and will therefore have a seat at that important table, thereby ensuring that the profile of the area is kept high.

The staff of EBBI do not have the time available to drive this initiative forward on their own. If the objectives of the Forum are to be met then a full time staff member is essential. Across Northern Ireland various funds are operating ensuring that initiatives are progressed by dedicated individuals who become experts in their fields. Tourism in East Belfast is no different and funding can surely be sourced even for a three-year period.

The West Belfast Partnership Board employs a tourism development worker funded under the Special Support programme for peace & Reconciliation. It is likely that the successor programme to this would be an appropriate channel to source funds for such a post.

## **10.5 Funding**

There is no pot of gold available to carry out the many projects, plans and programmes set out in this report. There is likely to be funding from the constituent parts of the next EU Programme including the Special Programme, which replaces the Peace & Reconciliation Programme. At the time of writing there is no clear indication of the scope and content of these Programmes for tourism so no pointers to approach can yet be given.

In a similar vein NITB is carrying out a major strategy review, which also may have a fundamental effect on the future funding of both development and marketing for private sector, public sector and voluntary sector. The outcome of this review will not be known until next spring and again an assessment will have to be made in the fall out from that policy decision. It is likely that there is to be much less emphasis on capital grants.

There is likely to be a much different funding picture next year. The effects on the EBBI and on private sector developers may be different.

For EBBI core funding for tourism may be sought from whatever EU Programmes emerge, from GEBPB core funding, from Belfast City Council and from BVCB. For each a special case may have to be presented and this report should form the basis of that case.

For major projects in the area there is a much broader range of funders to be pursued, normally in partnership with others. In every case it is likely that a special body will have to be created to drive the project forward, write business plans and funding cases and to lead the project.

Other area such as the arts will need coordinated approaches to Government Depts and agencies if progress is to be made.

None of this will be simple or easy and only by creating the tourism advocacy group as set out above, can concentrated efforts to source funds and utilise them efficiently and effectively.

## 11. ACTION PLAN

The action plan is based on the work that should be done in the first twelve months following the launch of this report. Some actions can achieve fast results while others will take much longer to bear fruit, and will need the full weight of the new Forum to keep them on track. This particularly reflects the major capital projects. Costings shown relate to the work of the Forum and do not reflect capital work costs especially for the key attractor schemes.

<b>EVENT</b>	<b>Date</b>	<b>Responsibility</b>	<b>Cost</b>
<b>11.1 Establish Tourism Forum</b> - find chair, scope members, agree objectives, agree modus operandi	<b>February 2001</b>	<b>EBBI &amp; GEBPB</b>	<b>£1000</b>
<b>11.2 Recruit Tourism Development Officer</b>  - prepare job description with advice of BCC etc  - funding to be secured preferably for 3 year contract	<b>April 2001</b>	<b>Forum &amp; EBBI</b>	<b>Annual £30,000 Salary, Overheads &amp; Rectmt</b>
<b>11.3 Establish Local Information Outlet (LIO)</b> - with BVCB & NITB	<b>Summer 2001</b>	<b>Forum &amp; TDO</b>	<b>£5000</b>
<b>11.4 Training Needs Analysis</b> - with Castlereagh College & Industry	<b>Autumn 2001</b>	<b>TDO &amp; CCFE</b>	<b>£1000</b>
<b>11.5 Implement Training Programme</b>	<b>Winter 2001</b>	<b>TDO &amp; CCFE</b>	<b>£2500</b>
<b>11.6 Environmental Audit</b> -use of students for surveys to be considered	<b>Autumn 2001</b>	<b>TDO &amp; Community Groups</b>	<b>£500</b>
<b>11.7 Environmental Action Plan</b> - an action plan for lobbying and action by others	<b>Winter 2001 on</b>	<b>TDO &amp; Forum</b>	<b>£1000</b>
<b>11.8 Website Upgrade &amp; Linkages</b>	<b>March 2001</b>	<b>EBBI</b>	<b>£500</b>
<b>11.9 A4 Triple Folded Flyer</b> - write, design, print & distribute	<b>June 2001</b>	<b>TDO</b>	<b>£2,500</b>
<b>11.10 Guide to East Belfast</b> - secure funding for, commission writer and designer, print & distribute	<b>January 2002</b>	<b>TDO</b>	<b>£10,000</b>

<b>11.11 Liaise with BVCB</b> - marketing opportunities, design guidelines, brand, LIO etc	<b>February 2001</b>	<b>Forum &amp; TDO later</b>	<b>Nil</b>
<b>11.12 Parliament Buildings</b> - secure tourist opening	<b>February 2001</b>	<b>EBBI</b>	<b>Nil</b>
<b>11.13 Titanic Quarter</b> - secure Forum input re. Tourism issues	<b>Spring 2001</b>	<b>EBBI, Forum &amp; TDO</b>	<b>Nil at this stage</b>
<b>11.14 Industrial Heritage Attraction</b> - carry out advocacy role for East Belfast working with H&W, BCC & MAGNI	<b>Spring 2001 on</b>	<b>Forum &amp; TDO</b>	<b>Nil at this stage</b>
<b>11.15 HMS Caroline</b> - liaise with RNR and lead museum ship campaign/fund raising	<b>Summer 2001 on</b>	<b>Forum &amp; TDO</b>	<b>Nil at this stage</b>
<b>11.16 Culture &amp; Arts</b> - work with groups to plan major centre initiative inc feasibility study	<b>Spring 2001 on</b>	<b>Forum &amp; TDO</b>	<b>£10,000</b>
<b>11.17 Festival</b> - work to reinstate Festival and plan in longer term	<b>February 2001</b>	<b>Forum &amp; TDO</b>	<b>£10,000</b>
<b>11.18 Entertainment</b> - develop scheduled entertainment in several venues – music in pubs	<b>Summer 2001</b>	<b>TDO &amp; Arts Groups</b>	<b>£2000</b>
<b>11.19 Trails</b> - Prepare simple trail leaflets for CS Lewis & Van Morrison (as website)	<b>Autumn 2001</b>	<b>TDO</b>	<b>£200</b>
<b>11.20 Accommodation</b> - run Guest House & B&B Seminars to encourage opening new premises	<b>Autumn 2001</b>	<b>TDO with NITB &amp; CCFE</b>	<b>£500</b>

## **EXECUTIVE SUMMARY**

1. The East Belfast Business Initiative, in association with the Northern Ireland Tourist Board and Belfast Regeneration Office commissioned the **Tourism Development Strategy for East Belfast** in order to assist the provision of a coordinated framework in which tourism can develop over the next five years. East Belfast is defined as the area covered by the Greater East Belfast Partnership Board embracing the traditional 'inner' East and stretching into Cregagh and Dundonald in the Castlereagh Borough Council area. (Para 1.1, 1.2)
  
2. It is estimated that in 1999 the area welcomed **118,200 staying visitors**, generating 569,000 bednights. These visitors spent £13M – but a substantial proportion of this expenditure could have occurred in other parts of Belfast. (Only primary research can determine the exact proportion). (Para 2.2)
  
3. The **profile** of Belfast visitors is likely to be similar to the East of the City with expenditure emphasis on retail, catering and accommodation. Day visitors spent most on clothes shopping followed by other retail, and then eating and drinking. (Para 2.3,2.4)
  
4. **Tourism attractions** in East Belfast are currently limited with only Streamvale Open Farm and the RUC Museum appearing in the 1999 Survey of Visitor Attractions (NITB). However the opening of the Odyssey Arena and its other attractions presents a major opportunity to attract visitors across the river. (Para 3.1)
  
5. **Accommodation** for visitors in East Belfast is limited with 3 Hotels, 1 Guesthouse and 5 B&Bs. With the welcome development of city centre accommodation there is now an opportunity to expand the accommodation base. (Para 3.2)
  
6. While wall paintings have an attraction to visitors, a mix of graffiti, kerb painting and flags can say '**keep out**' to a visitor. (Para 3.4)
  
7. The **outlook** for tourism to Northern Ireland is bright and that to Belfast particularly good. East Belfast needs to appeal to the growing market segments, to be competitive in price and value and to market it effectively to visitors. (Para 4.4)
  
8. **Strategically** East Belfast should not attempt to market itself as a stand-alone destination – it should utilise the Belfast Brand and work closely with the Belfast Visitor & Convention Bureau. (Para 5.2)
  
9. The **Vision** is to place East Belfast on the tourism map and thereby create jobs, wealth and a destination to be proud of. (Para 6.2)
  
10. The **Guiding Principles** for the Vision are:
  - Sustainable Tourism
  - Profitability
  - Selective Investment
  - Targeted Marketing

Public/Private Partnership

(Para 6.3)

11. The **Core Strategies** are to:

- Develop the Base
- Focus the Marketing
- Develop a Quality Approach
- Create an Advocacy Body

(Para 6.5)

12. **Product Development** should focus extensively on Industrial Heritage linked into the Titanic Quarter to achieve a world - class tourism attractor. **HMS Caroline's** future must be watched carefully with a view to utilising her as a base for a major maritime attraction. **Parliament Buildings** must be opened to visitors and not just pre booked groups. **Entertainment** must be provided in a number of pubs in the East. A major **Arts Centre** should be considered as both a base to grow the Arts and as a location for interpretive centres for CS Lewis and Van Morrison. **Accommodation** growth should initially be focused on Guesthouse and B&B development with some key hotel developments in due course.

(Para 7.1-7.7)

13. **Marketing** should be based around making East Belfast a 'must visit' part of the city. A higher profile is needed linked to better information provision for visitors, and for Belfast residents overall. **Integration** with the Belfast Brand of BVCB is essential as is close cooperation with that body. Two pieces of **literature** are required – one for widespread distribution and the other more substantial guide for those with a serious interest. The EastBelfast.com **website** should be linked in both directions with those of BVCB and NITB and have a higher tourism profile. Consideration should be given to the Eastlife Magazine being utilised as a high quality tourism tool.

(Para 8.2 –8.7)

14. A Local Information Office (**LIO**) for tourists should be established under the Tourist Information Network scheme. The **Welcome Host** Programme should be encouraged in the area and graffiti, flags etc examined from a visitor's perspective to avoid active discouragement to visiting the area. **Castlereagh College of Further Education** should be utilised as a training resource for marketing, customer care, tour guiding etc.

(Para 9.2,9.3)

15. Tourism must have the involvement of local people if it is to flourish and the area must have a coordinating body for tourism if issues are to be addressed and results delivered. Therefore an **Advocacy Body** or Forum should be established and be chaired by an influential person. The Forum should work closely with BVCB and employ a Tourism Development Officer. A strategy and work plan is essential as is sourcing funding for an initial three-year period.

(Para 10.1-10.5)