



# TOURISM STRATEGY FOR NORTHERN IRELAND

**10 YEAR PLAN**





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FOR NORTHERN IRELAND

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# EXECUTIVE SUMMARY

**Tourism is one of Northern Ireland's most important economic sectors and key to dispersing wealth right across Northern Ireland, contributing an annual tourism expenditure of more than £1 billion in 2019 and supporting approximately 71,000 jobs across the region.<sup>1</sup>**

In addition to revenue and job creation, development of the tourism sector has the capacity to cultivate and showcase local history, culture and natural and built heritage, making Northern Ireland not only a great place to visit but also a great place to live.

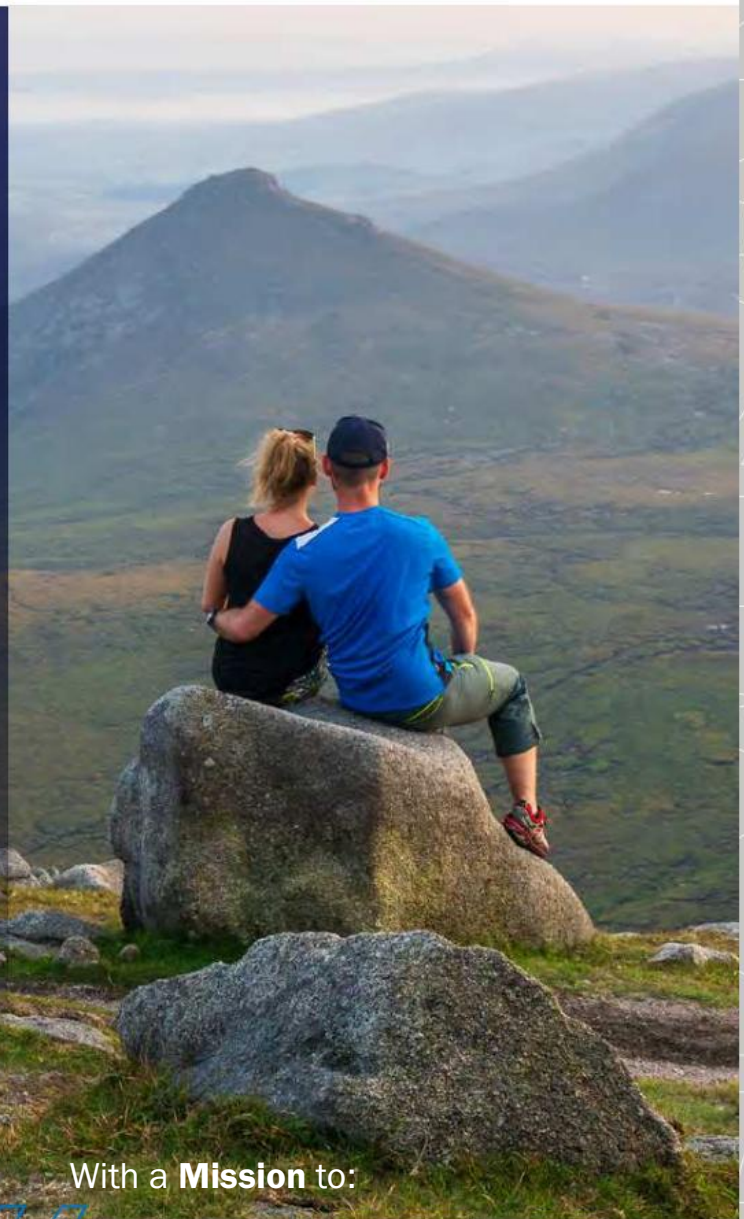
The Tourism Strategy: 10 Year Plan establishes a vision and mission for the growth of the tourism sector in Northern Ireland over the next decade. It will be a key enabler of the Department's 10x Economic Vision to help position the region internationally as an attractive place to visit, making our visitors feel welcome whilst at the same time helping to make the lives better of all our citizens. It will seek to deliver on the objectives of 10x by generating economic growth that is sustainable, inclusive and innovative.

<sup>1</sup> Northern Ireland Annual Tourism Statistics 2019 (nisgra.gov.uk) (Due to the Covid pandemic these remain the most up to date figures to act as a baseline)



The **Vision** of the Strategy is to:

**“Establish Northern Ireland as a year-round world class destination which is renowned for its authentic experiences, landscape, heritage and culture and which benefits communities, the economy and the environment, with sustainability at its core.”**



With a **Mission** to:

**“Support the Tourism Sector in building a more innovative, sustainable and inclusive tourism industry for all people and places in Northern Ireland which enriches its people, its economy and its guests.”**



The Vision and Mission are supported by a **Strategic Aim** to increase the value of tourism to the Northern Ireland economy compared to 2019 – which is the last full year of tourism statistics currently available.

It is designed to be a roadmap, premised on five themes, which seeks to strive for a new and ambitious growth trajectory that is **Innovative, Inclusive, Sustainable, Attractive** and **Collaborative** over the next decade. These five themes form the core of the Strategy and are designed to support continued growth in tourism in Northern Ireland to appeal to both overseas and domestic visitors, and also contribute to a better quality of life for the people who live here, enriching communities and spreading the economic and social benefits of tourism throughout the region.

The document identifies the key challenges and drivers for growth.

It recognises the industry's ability to develop as a thriving, sustainable industry of the future, showcasing world class visitor attractions and creating a year-round destination that will stand out in international markets.

It will also position Northern Ireland on the world stage as a destination of choice as well as increasing its attractiveness as an investment location.

This Strategy provides a framework for our delivery bodies such as Tourism NI and Tourism Ireland to work with other public authorities and the tourism industry to shape and develop local tourism strategies and action plans which will support and guide the industry to prepare for future success for the benefit of all of our communities. The Indicators associated with each theme will guide our delivery partners as they set shorter term, measurable objectives in their business plans to ensure we realise our vision and optimise tourism's contribution to the ambitions of the Department's 10x Economic Vision. The vision and mission of the Strategy can only be realised by businesses, communities and regional and local government working together in a truly collaborative approach.



A photograph of a person walking away on a paved path in a park. The path is lined with a black metal fence on the left and a grassy area with trees on the right. The trees have autumn foliage in shades of orange, yellow, and green. The sky is clear and blue. The overall scene is bright and sunny.

# INTRODUCTION



# INTRODUCTION

The importance of tourism as a significant driver of economic growth and its potential to deliver wide reaching change presents a real opportunity to maximise its contribution to growing the Northern Ireland economy and continue its role as an important export sector and provider of employment.

The tourism sector in Northern Ireland is a vital element of our export led economy and the industry has experienced healthy growth over the past decade, contributing an annual tourism expenditure of more than £1 billion (2019)<sup>2</sup>. However, there is significant potential for further expansion and opportunities exist to build on our strengths and grow the sector in line with the Department's 10x economic vision by enabling the innovative, inclusive and sustainable development of this value-added sector.

Recovering and rebuilding from the impact of the global pandemic provides us with a fantastic opportunity to think differently, to think longer-term and most importantly to consider how we can emerge as a thriving sustainable

tourism industry for the future, enriching local quality of life and showcasing world-class visitor attractions and creating a year-round destination that will stand out in international markets. With new international destination choices and visitor experiences continually emerging, we need a long-term vision which will require all those with a tourism interest to work collaboratively, grasping every opportunity to grow our tourism sector and bringing benefits to every part of Northern Ireland and make everyone feel welcomed.

The Department for the Economy has worked closely with our delivery partners, Tourism NI and Tourism Ireland, to develop this draft 'Northern Ireland Tourism Strategy: 10 Year Plan'.

<sup>2</sup> Northern Ireland Annual Tourism Statistics 2019 (nisra.gov.uk) (Due to the Covid pandemic these remain the most up to date figures to act as a baseline)



The Department provided Tourism NI and Tourism Ireland with a Vision Statement to signal our direction of travel and to help them plan for the incoming financial year and beyond. We have engaged with other relevant government departments. Tourism NI has used its close links with the tourism industry to help us engage with a range of stakeholders across the sector. This has greatly assisted our thinking and informed the development of our Strategy. This Strategy identifies the strategic future direction needed to realise tourism's already vital contribution to the Department for the Economy's '10x Vision: A Decade of Innovation'<sup>3</sup>; the outcome of which will ultimately see Northern Ireland positioned amongst the elite small advanced economies in the world, and the benefits of this change felt by all of our people. The 'Research on the Future of Tourism in Northern Ireland' Report<sup>4</sup>, commissioned by the Department and published in May 2023, demonstrates how tourism is aligned with the 10x Vision and is already delivering on key priorities.

Over the next decade, the 'Northern Ireland Tourism Strategy: 10 Year Plan' will be at the heart of everything

we do. It provides a framework for our delivery bodies such as Tourism NI and Tourism Ireland to work with other public authorities and the tourism industry to shape and develop local tourism strategies and action plans which will support and guide the industry to prepare for future success for the benefit of all of our communities. This will be our focus and the vehicle through which we deliver on our common purpose of supporting a growth in tourism that is Innovative, Inclusive, Sustainable, Attractive and Collaborative. These five themes form the core of the strategy and we want this growth to contribute to a better quality of life for all our citizens.

Alignment with this framework provides an opportunity to shape the future growth of tourism, harnessing the full potential of the industry; building on the strengths we have; adding to our appeal to both overseas and domestic visitors; and creating opportunities to spread sustainable economic, social and environmental benefits around the region, so that communities in **all** parts of Northern Ireland benefit, **all** year round.

<sup>3</sup> [10x Economy NORTHERN IRELAND'S DECADE OF INNOVATION](#)

<sup>4</sup> [Research paper on the future of tourism in Northern Ireland](#)

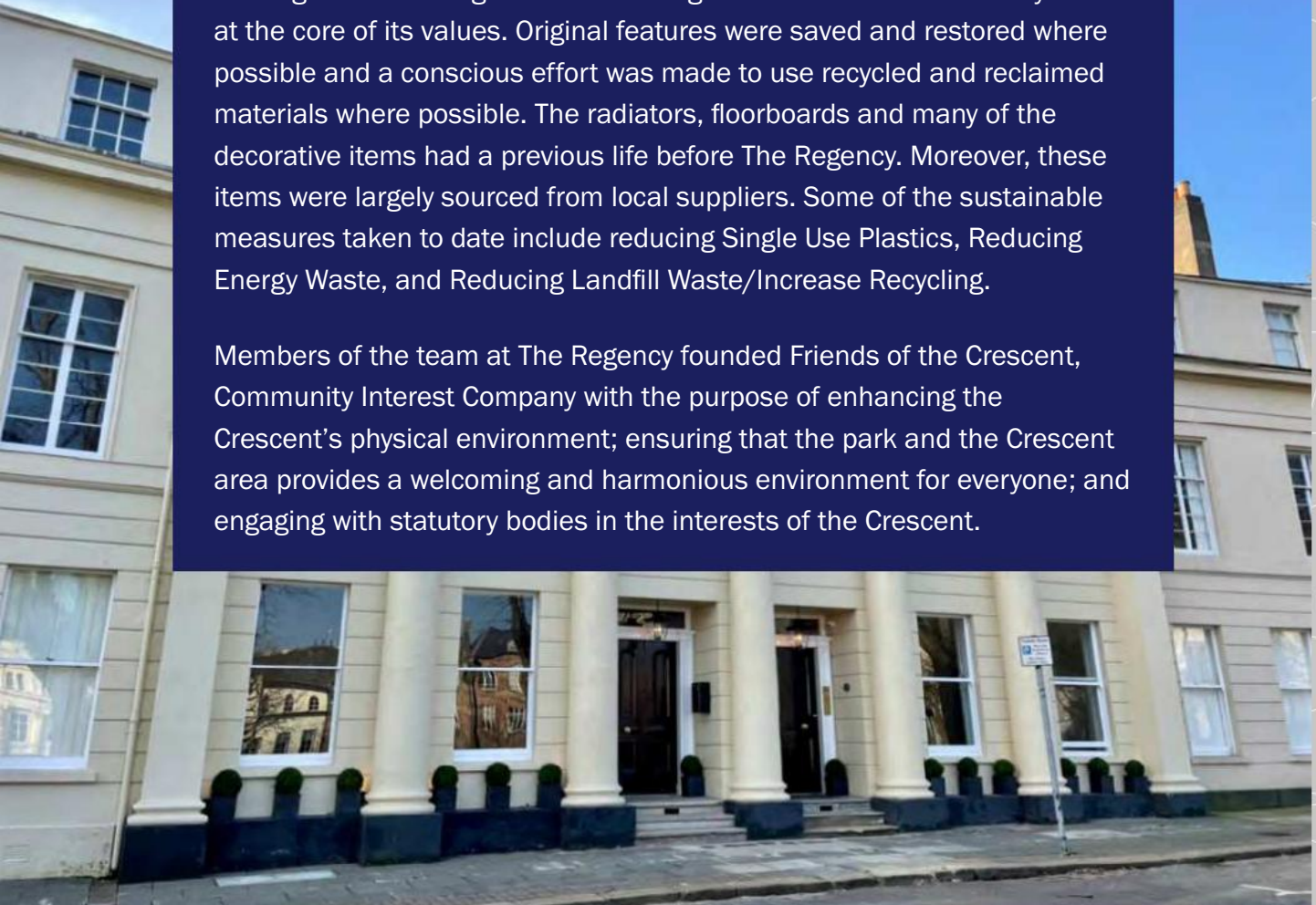
CASE STUDY

## THE REGENCY

**Situated in the heart of Belfast's historic Queen's Quarter and close to the city centre, The Regency is tucked neatly into South Belfast's Upper Crescent.**

The £2.5m restoration of two derelict Georgian townhouses dating back to 1846, has transformed this unique property into luxurious accommodation offering short stays complete with 24/7 butler-style service. Some of Northern Ireland's most talented craftspeople were enlisted to transform the neglected buildings back to life. Regeneration and Sustainability are at the core of its values. Original features were saved and restored where possible and a conscious effort was made to use recycled and reclaimed materials where possible. The radiators, floorboards and many of the decorative items had a previous life before The Regency. Moreover, these items were largely sourced from local suppliers. Some of the sustainable measures taken to date include reducing Single Use Plastics, Reducing Energy Waste, and Reducing Landfill Waste/Increase Recycling.

Members of the team at The Regency founded Friends of the Crescent, Community Interest Company with the purpose of enhancing the Crescent's physical environment; ensuring that the park and the Crescent area provides a welcoming and harmonious environment for everyone; and engaging with statutory bodies in the interests of the Crescent.



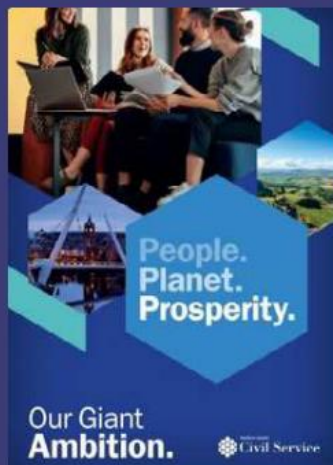
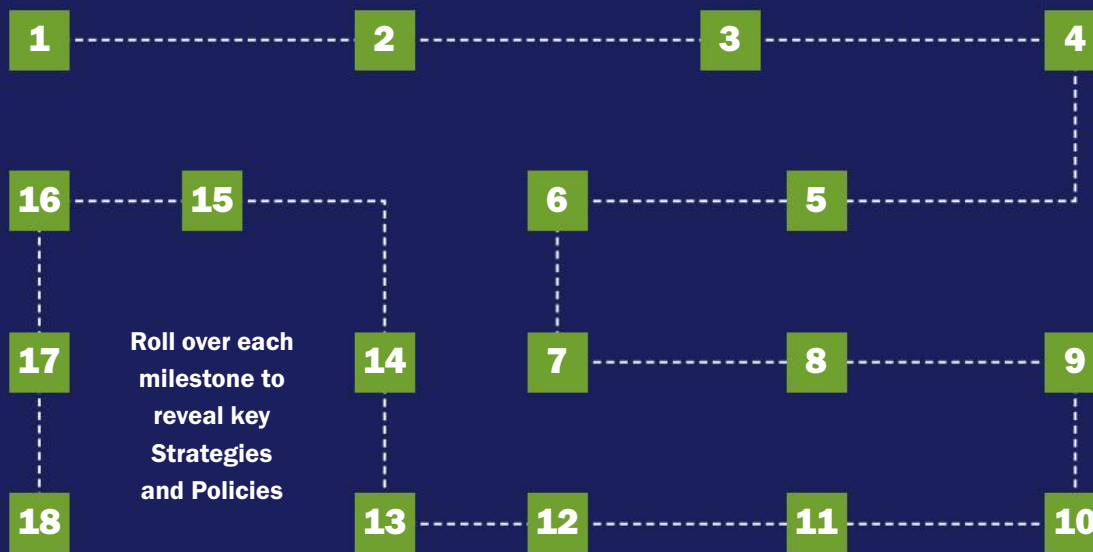


A coastal landscape at sunset with a large white outline of the number 2 overlaid on the scene. The background shows a calm sea under a sky with soft, colorful clouds in shades of orange, yellow, and blue. In the foreground, there are dark, jagged rocks. The number 2 is a large, white, hollow outline that spans across the middle of the image, with a white banner containing the text 'THE POLICY CONTEXT' positioned across its upper curve.

# **THE POLICY CONTEXT**

## THE POLICY CONTEXT

The importance of tourism is fully recognised by Government and this Strategy seeks to complement the aims and objectives of other key strategies and policies, both published and emerging, across a wide range of sectors who have an interest in shaping the future direction of the growth of the sector.



**PEOPLE.  
PLANET.  
PROSPERITY.**

Our Giant  
Ambition.





The Department for the Economy's economic vision, '10x Economy - an Economic Vision for a Decade of Innovation', seeks to set a long term vision for the Northern Ireland economy to deliver a ten times better economy. The outcome of this vision will ultimately see Northern Ireland positioned amongst the elite small advanced economies in the world, and the benefits of this change felt by all of our people.

The 'Northern Ireland Tourism Strategy: 10 Year Plan' will be a key enabler of the vision for a 10x economy and our tourism sector will be integral to contributing to the ambitions of this vision. Working together we can shape the future direction of the growth of the sector, growth that will be sustainable, inclusive and innovative that builds our sense of place making Northern Ireland an attractive place to live, work, invest and visit. This will be crucial to our ability to compete in global markets and, therefore, our tourism sector will be at the forefront of marketing our reputation and attractiveness to the world.



**VISION, MISSION  
& STRATEGIC AIM**



# VISION, MISSION & STRATEGIC AIM

The vision, mission and strategic aim of the Department's Tourism Strategy are set out below.

## OUR VISION



Establish Northern Ireland as a year-round world class destination which is renowned for its authentic experiences, landscape, heritage and culture and which benefits communities, the economy and the environment, with sustainability at its core.

## OUR MISSION



To support the tourism sector in building an innovative, sustainable and inclusive tourism industry for all people and places in Northern Ireland which enriches its people, its economy and its guests.

## OUR STRATEGIC AIM



To increase the value of tourism to the Northern Ireland economy by 50-75% compared to 2019<sup>5</sup>.

<sup>5</sup> Please note the 50-75% increase in the value of tourism expressed in the Strategic Aim is based on a Compound Annual Growth Rate (CAGR) of 4-6%.



**WHY IS TOURISM IMPORTANT  
IN NORTHERN IRELAND?**



## WHY IS TOURISM IMPORTANT IN NORTHERN IRELAND?

“Tourism has the power to foster inclusion, protect nature & promote cultural understanding.”<sup>6</sup>

Tourism plays a vital role in the preservation of our historic, cultural and recreational resources and helps to sustain and promote our internationally renowned landscapes. It creates a unique sense of place, provoking pride and confidence within local communities; providing fertile ground for enterprise, creating new, independent, small businesses and new services or facilities that could not be sustained by the local population alone.

<sup>6</sup> World Tourism Day 2022: Sector United Around “Rethinking Tourism” for People and Planet ([unwto.org](http://unwto.org))



CASE STUDY

## CHOCOLATE MANOR

Located in the picturesque village of Castlerock, Chocolate Manor was grown from a homebased, startup business established in 2012 to one of NI's leading artisan chocolate producers, winning best Food & Drink tourism business at the 2022 NI tourism awards.

In 2020, owner Geri Martin moved into new premises in Castlerock, establishing the North Coast's only Chocolate Shop & Chocolate Experience Provider, running a range of hands-on, bespoke experiences and a food emporium where visitors can see, and purchase locally made creations, welcoming thousands of visitors per year.

In March 2022, Chocolate Manor became the 12th Economusée in Northern Ireland, the first chocolate maker outside of Canada to gain this accolade, focusing on the preservation and protection of traditional skills and crafts.



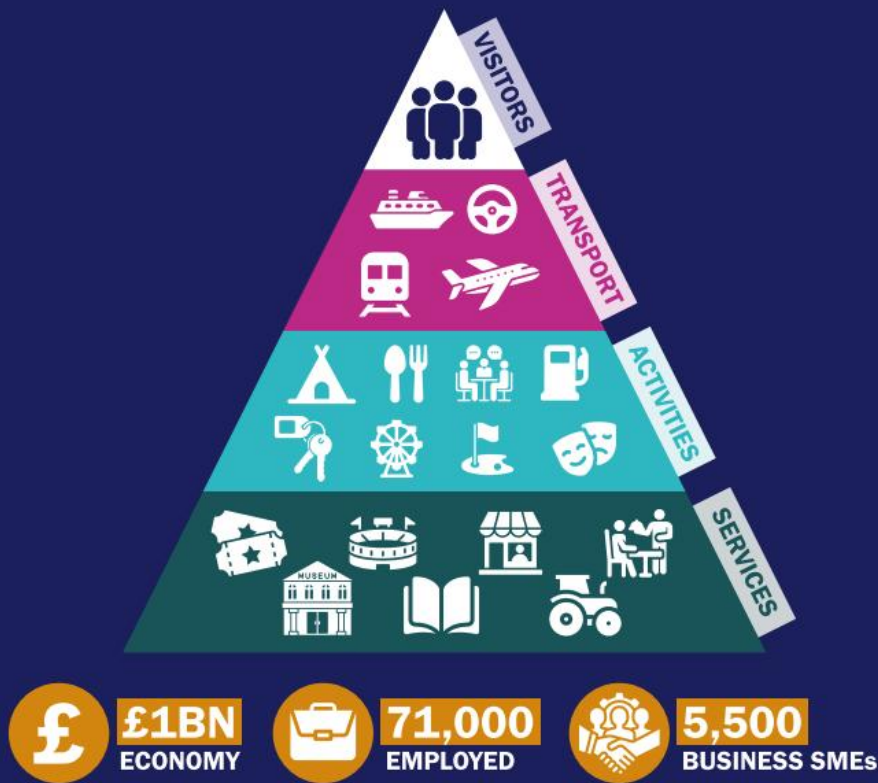
Northern Ireland has a unique history, culture and landscape, all contained within a small geographic area. We have the capacity and potential to be the 'hidden gem' that visitors can discover and enjoy. We are ambitious for the future and believe in our capacity and capability to deliver sustainable growth ahead of the international tourism market, competing on the global tourism stage.

The societal impact is key in that a vibrant tourism economy positively positions Northern Ireland as a place to visit, study, live, work and invest. Positive perceptions of a destination are critical to wider business decisions and choices linked to inward investment, exports and education. It brings new facilities to our towns and cities, creates opportunities in rural areas and is a source of pride for local people.

Northern Ireland tourism remains one of the largest, locally owned, internationally traded sectors of our local economy, directly impacting the economy by generating demand for tourist services such as accommodation, recreational and cultural activities and transport services. As visitor numbers and spend increase, so too does the direct economic impact for the local economy.

More widely, indirect benefits are also generated as tourism generates demands on sectors across the economy, such as construction and agriculture. The tourism sector overall has grown to become a key contributor to the Northern Ireland economy firmly establishing its role in supporting the Department for the Economy reaching its 10x ambitions.

**How Tourism Supports the Northern Ireland Economy**



**The Northern Ireland Tourism Landscape**

In Northern Ireland, our tourism sector has become a huge success story. In 2019, the sector contributed £1 billion of expenditure to the local economy, including delivering £731 million in export earnings<sup>7</sup>. The sector employed approximately 71,000 people throughout the region, accounting for one in every 12 jobs. An estimated 12,800 new jobs were created across the tourism and hospitality sectors between 2013 and 2019 (+22%).

Employment was geographically dispersed with 70% of those jobs outside of Belfast offering inclusive opportunities and benefits throughout all regions and to all ages.

2019 was also another record year for overseas trips to Northern Ireland, indeed the 7th consecutive record year. In 2019 overseas visitors contributed £589m (£369m from GB, £220m from Other Overseas) to the economy.

<sup>7</sup> [Tourism Statistics Annual Publication 2019](#)



# TOURISM STRATEGY FOR NORTHERN IRELAND

## 10 YEAR PLAN



With the outbreak of the COVID-19 pandemic in early 2020 the tourism industry experienced an immediate shock with an unprecedented and detrimental impact on a global scale. In Northern Ireland this was further exacerbated with preparing for, then delivering on, EU Exit. Additionally, we have faced challenges such as a cost-of-living crisis, high inflation, and political uncertainty.

However, by 2022 the tourism sector showed positive signs of recovery to pre-COVID levels, especially from our closest markets.

In 2022, Northern Ireland welcomed over 1.1m overnight trips by Republic of Ireland residents, eclipsing the one million figure for the first time and seeing record levels of trips, nights and spend.

Republic of Ireland to Northern Ireland trips, nights and spend during 2022 have each seen an increase of 50.6%, 41.6%, and 64.6% respectively, compared to 2019.

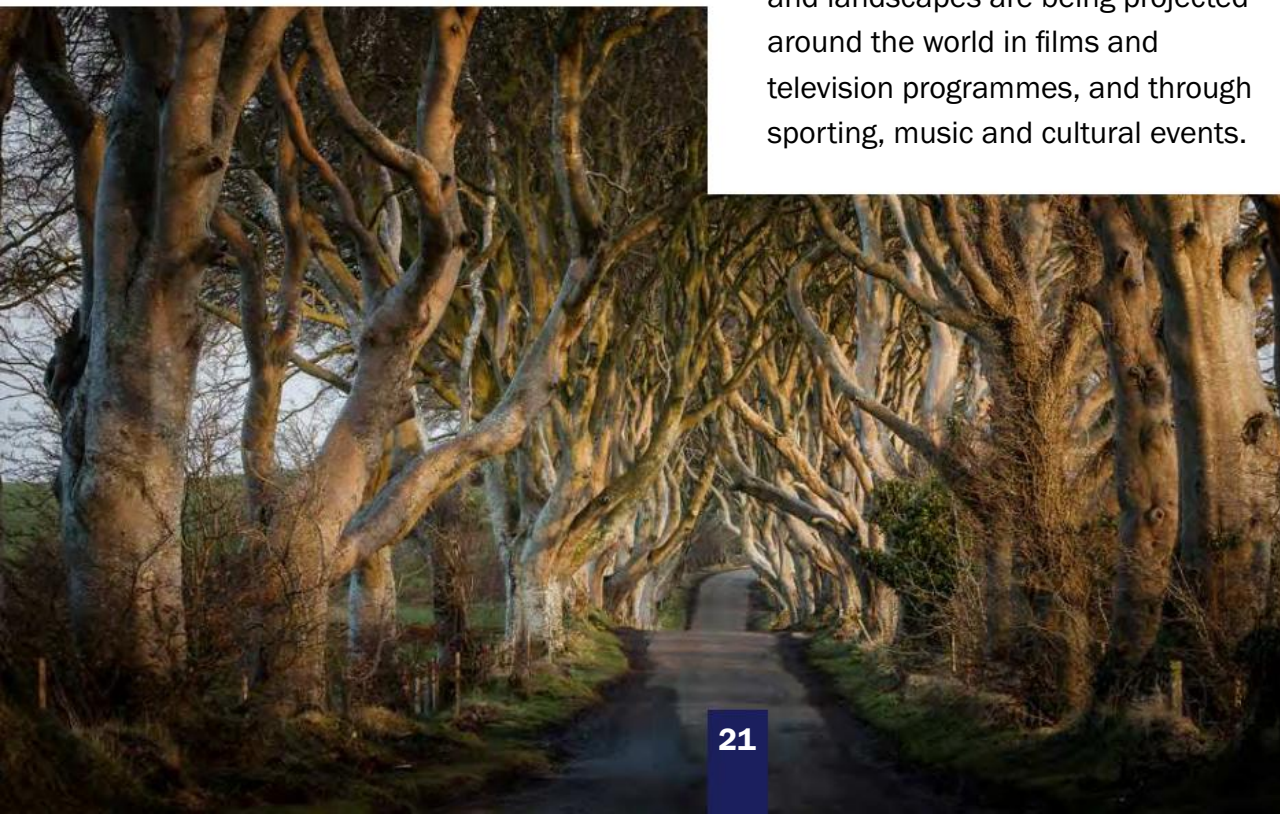
In 2023 there has been a strong post covid recovery and its anticipated visitor numbers will reach 90% of 2019 levels (GB 91%, Other Overseas 87%).

Due to the COVID-19 pandemic, 2019 remains the last year for which NISRA tourism statistics are available and hence that will be the baseline year for our strategic aim. The NISRA statistics measure expenditure within the tourism sector. The Department has also contracted NISRA to complete work on a Tourism Satellite Account (TSA) to give a measure of the wider value of the Tourism sector to our local economy including the number of jobs supported. A TSA is an internationally recognised methodology and consists of a set of data tables based around analyses of data on both expenditure by tourists, and on business sectors which serve tourists. It is hoped that this will be available by the end of the 2023-24 financial year.

### **Northern Ireland's International Reputation**

For a long time, Northern Ireland was not viewed as an attractive tourism destination due to our recent troubled past. Since the 1998 Good Friday/Belfast Agreement, the tourism industry in Northern Ireland has emerged as one of the greatest success stories of the wider peace process. Since then, we have been able to capitalise on our tourism potential as we develop a reputation as a great place to visit with outstanding scenery, strong culture and heritage, authentic experiences and warm people.

Our tourism attractions are officially being recognised as 'world-class' and images of our amazing scenery and landscapes are being projected around the world in films and television programmes, and through sporting, music and cultural events.





CASE STUDY

## TITANIC BELFAST

**Titanic Belfast opened in 2012 with the aim of establishing Belfast as the home of RMS Titanic, celebrating the city's maritime and industrial heritage, and showing that the spirit that built Titanic remains today. Since then, the visitor attraction has gone from strength to strength on a local, national and international level.**

A £4.5m large-scale refreshment of the Titanic Experience, completed in partnership with Maritime Belfast Trust in 2023, was designed to deliver a world-class spectacle, enabling the attraction to continue to drive visitors to Belfast and Northern Ireland while enhancing the interpretive and interactive experience in an innovative way for future generations. The project helps the Titanic story to come to life in a new immersive way, incorporating innovative new technology whilst also including authentic storytelling, animation, music and more. An illuminated 7.6m long scale model of RMS Titanic is suspended from the ceiling and fully rotates, known as 'The Ship of Dreams'.

Continuous improvement at Titanic Belfast drives digital innovation, focusing on seamless experiences for visitors through mobile ticketing, digital maps and multi-media guides provided in different languages. Social sustainability is an important consideration throughout, partnering with local businesses where possible and creating jobs across these companies.

### The growth in Northern Ireland tourism 2011-2019

**Belfast has the highest hotel occupancy rate outside of London.**



There is, however, still significant potential for further growth if the Northern Ireland tourism economy is ultimately to perform at the same level as that of the rest of the Island of Ireland.

In 2019, 11.3m overseas tourists were welcomed to the island of Ireland, 2.2m visited Northern Ireland, 26% of overseas visitors to Northern Ireland arrived via the land border (7% of GB tourists, 62% of Other Overseas tourists).



Total GB and Other overseas visitor tourism revenues in ROI were over seven times the level achieved in NI – £4.5 billion in ROI compared with £589 million in NI. In landmass terms, the Republic of Ireland is five times larger than Northern Ireland and 2.5 times larger by population in 2019. During 2019, 67% of total overnight tourism revenue in ROI came from GB and Other Overseas visitors compared with 56% for NI, these earnings were mainly generated by visitors from mainland GB rather than outside the UK.

A further indicator of the future potential of the Northern Ireland tourism sector is when compared to ROI the average spend per visit for GB and Other Overseas Visitors was only £264 in Northern Ireland during 2019, compared to £470 in Republic of Ireland. GB and Other overseas visitors also stay longer in ROI, staying on average 7.4 nights compared with 4.4 nights in NI (2019). NI spend per head in ROI (for the over-16 population in 2019) was £235; conversely, ROI spend per head in NI was £34, demonstrating a ratio of 7:1 in favour of ROI.







**OUR SUCCESS**



## OUR SUCCESS

### How did we get here?

There are a number of key drivers which can be attributed to our past growth. Our decade of success undoubtedly helped enable the sector to reach the significant achievement of becoming a £1billion industry in 2019. Now regarded as one of the most important export sectors of the region's economy, the tourism sector is a key pillar of economic growth.

It generates wealth, jobs, civic pride and innovation. Understanding these drivers will help equip us to meet the challenges facing the industry as we move through the next decade and grasp the opportunities to set tourism on a path to a more resilient, inclusive, and sustainable future, creating wealth for the Northern Ireland economy.

## DRIVERS FOR GROWTH

### Visitor Attractions and Experiences - Outdoors, Culture & Heritage



Accommodation



Screen Tourism



Food & Drink



Events



Business Tourism

### Underpinned by

Targeted Marketing and our Experience Brand, 'Embrace a Giant Spirit'  
Digital Innovation and Enhancements



Regional Spread

**ENABLING**

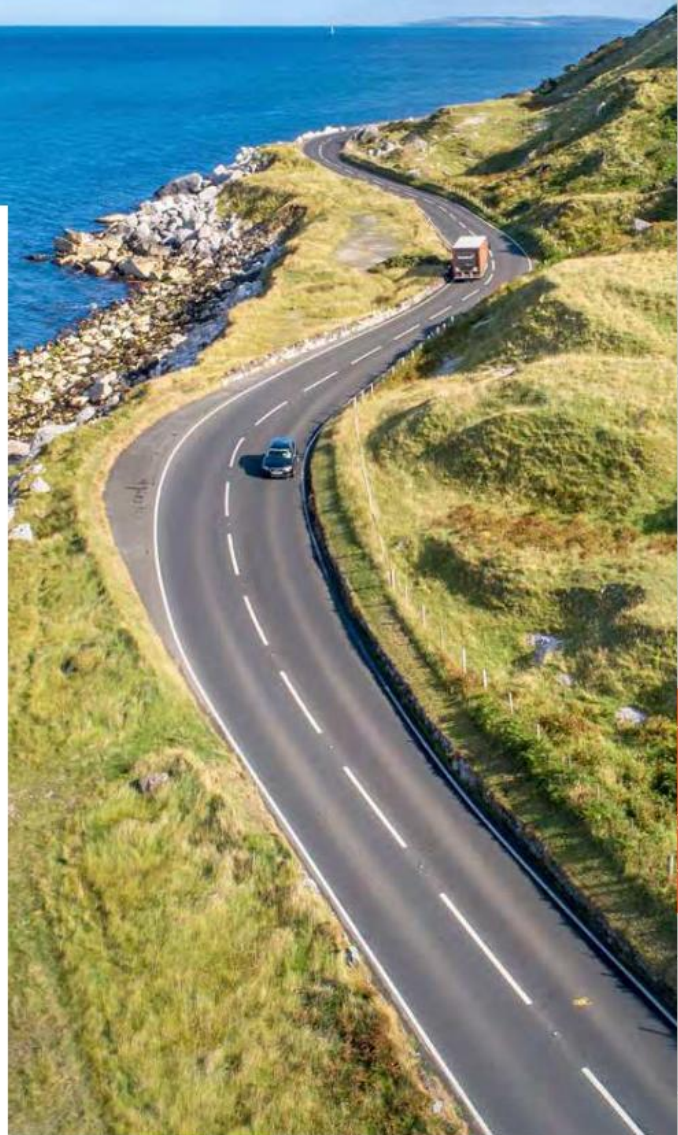


Season Growth

In 2012, there were a number of “signature” tourism projects completed with Tourism NI having invested around £100 million in support of projects worth more than £225 million. These projects included the new visitor centre at the Giant’s Causeway World Heritage Site and Titanic Belfast. These authentic ‘Hero Products’ have delivered a step change in the number of visitors coming to Northern Ireland to see these world class attractions.

These visitor attractions are clearly focused on our landscape and our heritage whilst at the same time meeting the expectations of those visitors from Northern Ireland’s core target markets and priority market segments.

However, since our last significant capital investment over a decade ago, our competitor destinations have been continuing to invest in their tourism infrastructure. Our tourism products are focused in key honey pots, namely Belfast and the Causeway Coastal Route - with many of these sites reaching capacity in peak season and creating potential frustrated demand.



It is welcome therefore that significant investment through City and Growth deals offers capacity building opportunities through development of additional demand generating product in other locations that will encourage wider geographical dispersion of visitors.

Our approach to tourism development requires strategic alignment and collaborative thinking on both a geographical and organisational level.



**CASE STUDY**

# HOTEL KILLEAVY CASTLE

**Opened in April 2019 by Mick and Robin Boyle after a sympathetic restoration, Killeavy Castle Estate offers accommodation including a 19th century castle, boutique hotel and luxury lodges. The 365-acre estate has an onsite working farm, Walled Garden and Estate Garden. The Estate is complete with a 2 AA Rosette award-winning restaurant, bistro bar, spa and farm store. Amongst a range of accolades, the Estate won Best Food & Drink Tourism Provider at the 2022 NI Tourism Awards.**

Sustainability principles are prioritised in the day-to-day running of the hotel, in particular to the authentic Farm to Fork dining experiences with 90% of food served in the dining areas either grown onsite or sourced within a 20-mile radius.

Visitors to the Estate can take a farm & heritage tour or foraging experiences with visitor experiences designed to maximise the positive environmental impacts of tourism. Additionally, Killeavy Castle Estate has a sustainability plan in place which aligns with the UN Sustainable Development Goals. This internationally recognised framework focuses on 17 key goals and guides, the setting of targets and measures for each, which are reviewed and evaluated on a regular basis. Future committed plans include planting 50,000 native trees on their 200-acre mythical woodlands to create a biodiversity corridor between the estate and Slieve Gullion.

## Enhanced Visitor Accommodation

Our tourism accommodation offering has developed to provide a breadth of choice to visitors. New arrivals have ranged from luxury hotels to luxury glamping pods. Private sector development across the region's hotel sector boosted high quality

accommodation and other tourism developments with a low environmental footprint. The enhanced accommodation supply has helped to meet the demands, needs and expectations of our visitors, in terms of volume of supply, quality, and affordability.

**CASE STUDY**

# SALT HOUSE

**The Salthouse Hotel, in the seaside town of Ballycastle, generates its own energy through solar and wind power, with a wind turbine mounted onsite and solar panels installed around the hotel.**

The energy generated is used to ignite the hotel's motion-sensor LED lighting, heat the hotel through heat pumps, charge the electric vehicle charging points as well as the electric bikes onsite. It also supplies energy for the fully electric kitchen in the restaurant and the SMART technology system which monitors consumption around the hotel. Timber frames around the building are used to retain any heat, and biogas and wood pellet boilers are used for further heating. The net result is that the hotel gives back more to the grid than it consumes. These measures not only minimise emissions but also lead to significant cost savings for the property.

Local and eco-friendly options are favoured as part of the hotel's purchasing policy. Local sourcing builds local relationships, contributes to the local economy and allows for shorter and quicker delivery times. The hotel works with local, environmentally-conscious waste management companies. There is also a herb garden onsite from which produce is used in the kitchen.

Sharing knowledge and educating both staff and guests is a fundamental element of The Salthouse Hotel's Sustainability Strategy.

Collectively, Belfast and Causeway Coast and Glens account for just over half (52%) of all of Northern Ireland's accommodation. In developing future accommodation policy it will, therefore, be important to consider how to encourage development of

accommodation outside the Belfast area that will support a greater balance across Northern Ireland and provide the visitor with a choice of places to stay that will lead to greater regional dispersal and, hence, more nights spent on trips.



## **Events**

Events have played an important role in the growth of the tourism industry in Northern Ireland in recent years. International events such as the Giro d'Italia, the MTV European Music Awards, hosting of the Irish Open and the Women's Rugby World Cup have played a key role in generating a positive impact on the perception of Northern Ireland in key overseas markets. The 148th Open, hosted at Royal Portrush in 2019 itself brought over £100m economic benefit to Northern Ireland. Expectations are high for its return in 2025.

Events have the potential to play a role in the overall visitor experience and economic benefit for Northern Ireland. Events offer the visitor the opportunity to immerse themselves in local culture, heritage and tradition. Events also meet other important industrial, cultural and social agendas, including creating a sustainable, inclusive and welcoming event programme for all our local communities as well as visitors.

Our vision is to create a portfolio of distinctive, high-quality sustainable tourism events which tell a compelling story of Northern Ireland to the world.

We will also work to maximise the tourism benefit for Northern Ireland from any events curated through the development of a Northern Ireland Events Framework.

## **Tourism Marketing Campaigns**

Northern Ireland tourism specific campaigns sought to maximise the opportunities in both the NI and ROI markets to increase visitor numbers and spend. Campaigns in ROI yielded a considerable rise in spend and revenue in NI businesses. This increased our share of the all-island staycation market particularly during the COVID-19 pandemic with a significant number of people from ROI having travelled to NI for the first time on leisure breaks.

Overseas marketing campaigns delivered by Tourism Ireland have enabled dramatic improvement in visitation to Northern Ireland. In 2022 Northern Ireland featured in the highly successful Green Button campaign that kick started the recovery of overseas Tourism. In 2023, in addition to the Global Campaign Fill Your Heart with Ireland, spotlight features on Belfast City of Music UNESCO designation were brought to New York and Boston. In Great Britain there were collaborations with Spotify to position Belfast's vibrant music scene.



Tourism NI's high profile "Embrace a Giant Spirit" re-brand was launched at the end of 2019 to promote Northern Ireland as a visitor destination on the island of Ireland and supports Tourism Ireland's messaging overseas. This was developed to help Northern Ireland stand out amongst our competitors, emotionally connect with its target market segments and communicate to the consumer the experience they can expect if they choose to visit Northern Ireland. The rebrand is synonymous with a high-quality tourism offering and visitor experience, instantly recognisable as distinctively Northern Irish and has ensured the region has the ability to complement and compete with the other experience brands on the Island of Ireland. The appeal of the "Giant Spirit" re-brand has undoubtedly played a pivotal role in driving increased visitor numbers. It also capitalised on the staycation trend across the island that had started to surge prior to 2020, which was then accelerated by the pandemic.

Fill your heart with  
**Ireland** 



Tourism Ireland has promoted Northern Ireland as part of the island of Ireland destination message overseas in over 20 markets worldwide. This approach has seen dramatic improvements not just in terms of visitation and contribution to the sector but to the desirability of Northern Ireland as a holiday destination. The development of new attractions, accommodation offerings and experiences are visible and promoted heavily across Tourism Ireland media platforms and headline brand campaigns. The 2023 "Fill Your Heart with Ireland" TV campaign featured actors from the internationally recognised "Derry Girls" programme.



**CASE STUDY**

# CRUMLIN ROAD GAOL

**Crumlin Road Gaol is Northern Ireland's only remaining Victorian era prison. Having closed in 1996 it was re-opened as a visitor attraction in 2012, designed to allow visitors to gain a unique and memorable insight into 150 years of history surrounding the daily lives and routines of both prisoners and staff.**

Innovation is central to the experience at the Gaol, continuing with the 2023 completion of a digital project to enhance the self-guided visitor experience which includes holograms to bring the history to life and an AR Zone for visitors to fully immerse themselves into the Gaol when it was a working prison.

Audio Guides are also available to help customers navigate their way around the 13-acre site. To enhance the inclusiveness of their self-guided offer, content is offered in 6 languages and there is also a facility to allow British Sign Language allowing material to be interpreted via sign videos and making the tour more accessible.

## **Digital Innovation and Enhancements**

From an innovation perspective, the industry has had to continually innovate to adapt to the digital revolution which has swept through the travel and tourism industries in recent years. Today's traveller is accustomed to being able to do practically anything from their mobile

device; from booking flights, checking in, and booking hotel rooms, unlocking their hotel room door, ordering room service, accessing information, booking experiences, sharing these with their peers and sharing their opinions instantly on review websites.

**CASE STUDY**

# DERRY GIRLS SPONSORSHIP

**With an average of 2.9m viewers per episode, TV series Derry Girls, has been an international success connecting to audiences through its humour and storytelling. In 2022, Tourism Ireland in GB sponsored the final series of the show on Channel 4 including creating idents around the broadcast and an online partnership with C4. Producing a creative infused with humour and aligned to the style of the show enabled Tourism Ireland to showcase Derry-Londonderry and NI as an exciting holiday destination.**

The campaign delivered excellent results with a broadcast reach of 9.5m adults and a reach of over 41m impressions through video on demand driving 96k clicks through to the Ireland.com website. On social media, 9m Facebook impressions were delivered with 12.7m impressions on YouTube of the sponsorship. A follow up brand study demonstrated that 23% of viewers claimed to have visited Ireland.com in the month following the sponsorship and consideration of NI as a holiday destination rose by 12%.

## Screen Tourism

Screen tourism has grown at a phenomenal rate with Northern Ireland having become an ever-increasing popular destination choice for filming television and screen dramas such as Game of Thrones and Derry Girls. The significant investment in the growth in studio space has also helped secure Northern Ireland's reputation as a world class film location.

Visitors want to visit locations and landmarks where the most exciting and memorable scenes have been filmed. The industry has responded to this trend by adding value to the tourists' experience with a range of offerings such as guided tours having been developed around the story-telling and the opening of new attractions such as the Game of Thrones Studio Tour in Banbridge.





### **Business Tourism**

Business Tourism, (meetings, incentives, conferences and exhibitions sector) has grown our international reputation by showcasing Northern Ireland as a destination for unique, authentic and memorable conferences and events supporting the region's economic development, education and tourism objectives.

Business Tourism plays an important role in offsetting seasonality and in 2019, it generated £37 million of direct expenditure for the Northern Ireland economy. Tourism Ireland provides platforms overseas to enable operators to grow this business.

### **Food & Drink**

Northern Ireland's food & drink offering has played a key role in enhancing the visibility and reputation of NI as a must-see destination. Food & drink are key elements of the travel experience and contribute to some of the strongest memory triggers. Importantly, food & drink expenditure accounts for around a third of total overnight visitor spend. The success

of the Northern Ireland Year of Food and Drink initiative back in 2016 did much to enhance the visibility and reputation of Northern Ireland's artisan produce, restaurants, markets, food tours and festivals. Ultimately this led to Northern Ireland being awarded the prestigious 'Best Food Tourism Destination' at the 2018 World Travel Awards.

**CASE STUDY**

# WALLED CITY BREWERY

**Walled City Brewery is a multi-award-winning restaurant and craft brewery at the end of the Peace Bridge in the heart of Derry/Londonderry, opened in May 2015 by husband-and-wife James and Louise Huey. Housed in an historic military barracks, Walled City Brewery have crafted over 500 different beers with identifiable links to the city, and in 2022, opened new additions to enhance the visitor experience including a taproom which resulted in a 50% uplift in revenue.**

Walled City Brewery are members of the Legenderry Food Network and active supporters of other entrepreneurial enterprises in the city, encouraging smart ideas in food and hospitality. Collaboration is equally important, collaborating with family-run business Foyle Bia Mara to host the UK & Ireland's first ever Oyster & Stout Festival in February 2023, where everything was produced within a 15-mile radius.

Further extending their appeal to visitors, Walled City Brewery offer a range of tasting experiences that celebrate the art of gin-making and rich history of brewing, including the Earheart Gin School, where visitors can design, distill and take home a bespoke gin recipe.

Food-motivated visitors are of significant value, tending to spend more, stay longer and often buy products both in destination and when they return home. Both international and domestic visitors are looking for experiences that are unavailable where they live, seeking to eat foods as close to their source or place of origin as possible. This, coupled with a more sustainable approach to travel,

will increase the focus on local food & drink in the years ahead. Northern Ireland is well poised to meet these needs with its warm welcome, giant spirit and high quality, traceable food & drink offer. The food & drink offer, therefore, needs to deliver to a consistently high standard, complimenting and reflecting Northern Ireland's agricultural importance and history, and our broader culture and heritage.



A photograph of a modern building with a faceted, metallic facade. The building is set against a clear blue sky. In the foreground, there is a large, circular, white sculpture made of thin metal rods. The building's facade is composed of many small, rectangular panels that create a complex, geometric pattern. A few people are visible near the entrance of the building, which has a sign that reads "APPRENTICESHIP CENTERS".

# **WHAT TYPE OF TOURISM IS BEST FOR NORTHERN IRELAND?**

# WHAT TYPE OF TOURISM IS BEST FOR NORTHERN IRELAND?

## What Visitors Want

Consumers seek authentic, immersive experiences and a wider tourism economy that allows them to connect with the people and places they are visiting. They increasingly see their holidays as an extension and reflection of themselves.

This includes a desire to discover new and interesting places, explore, learn, and have a memorable time with friends and family. Moreover, they are prioritising eco-friendly options that are affordable, sustainable, and accessible.

## CASE STUDY

# OM DARK SKY PARK

**OM Dark Sky Park at Davagh Forest is one of only 78 destinations around the world with Dark Sky accreditation, and the only one of its kind in Northern Ireland.**

It offers a range of compelling visitor experiences such as daily guided tours and collaborates with local guides for their innovative Stars and Stones experience where visitors can spend a night under the stars, learn about the ancient Beaghmore Stone Circles and gaze at the constellations through a state-of-the-art telescope. They further collaborate with Sperrin View Glamping to encourage visitors to extend their stay in the area and promote the destination.

Protection against the negative impact of light pollution is a core ethos of OM Dark Sky Park, safeguarding the night skies for present and future generations.



# TOURISM STRATEGY FOR NORTHERN IRELAND

## 10 YEAR PLAN



Source: Tourism NI Product Review 2023

With ever changing market demand for tourism product and experiences it is vital that the tourism industry remains innovative and a destination that champions its warm welcome, authentic stories, natural landscapes, and cultural assets.<sup>8</sup>

### Key Markets

Concentration of our efforts will be vital to our future success. With this in mind, our strategy for growth will focus on a number of priority market and segments. This focus does not imply that there are markets or segments that we are not interested in, rather there are ones that we are focused on ahead of others.

The strategy will seek to develop a well-balanced market portfolio and minimise overreliance on any one market.

Fundamental to our focus on being a sustainable destination, our emphasis will be less on encouraging more visitors, and more on encouraging our visitors to stay longer, consume more tourism product thus spending more.

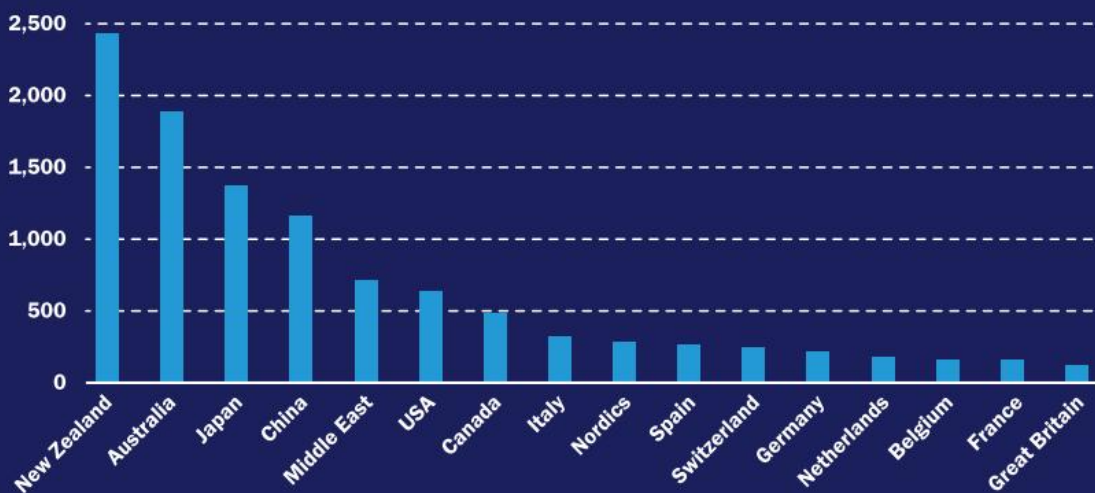
The four markets of primary focus will be the NI domestic market, Great Britain, the Republic of Ireland and North America. Official statistics show that in 2019 there were 5.33 million overnight visitors in NI, staying for a total of 16.6m nights and spending £1.04 billion.

8 Based on TNI Experience Research (Innovation Screener), 2020

The domestic, ROI, GB and North American markets collectively accounted for 90% of these trips, 82 % of nights spent and 87% of revenue generated. The three 'closer to home' markets of NI, ROI and GB, represented the focus of our Covid-19 recovery

programme under the Tourism Recovery Action Plan. With this stable base for further recovery and growth and with the full opening up of international travel in 2022, pent up demand in the US has resulted in a strong recovery from this market in 2023.

**Passengers from long-haul markets generate higher CO<sub>2</sub>e**



These four markets have been chosen based on their scale, value, potential for growth and likely propensity to consider Northern Ireland as a holiday destination. Critically, they are markets where the carbon footprint of the visitor will have least environmental impact.

The North American market has been included in our priority list as, whilst it obviously has a higher carbon footprint than the closer to home markets due to the distance required

to travel, visitors from the US and Canada tend to spend more and stay longer.

These markets will be given primary consideration with respect to strategy and resource allocation in the following areas:

- Marketing and brand activation
- Product and experience development
- Distribution development and network building.



### **Northern Ireland**

Overall, Northern Ireland is held in high esteem as a short break destination within the domestic market, perceived as offering better value for money than the Republic of Ireland and GB. In 2019 it accounted for 44% of all overnight trips taken in NI with 65% of these being holiday trips – higher than any other key market. For some Local Authority areas, the NI domestic market accounts for up to 65% of visitors. NI consumers taking a break in NI are keen to relax and unwind and have fun. The domestic market is important for both season extension and regional dispersal.

### **Great Britain**

As NI's single largest market in terms of revenue, 35% in 2019, it is imperative that GB is a core focus for the future. GB holidaymakers making their first visit to Northern Ireland see us as a short-break destination which can be enjoyed at any time of the year. Subsequently, 53% of our GB holidaymakers are coming on a repeat visit – a much higher proportion than from any other source market. Encouraging previous visitors to come back again and explore other parts of Northern Ireland beyond Belfast on their return trip, is a real opportunity from GB.

The majority of GB residents enter directly through NI airports or seaports.

### **Republic of Ireland**

As our nearest neighbour, the Republic of Ireland market is one that represents huge potential, having previously underperformed. The ROI Market Recovery Taskforce launched its growth strategy in 2017, further refreshed in 2021. With highly focussed priorities required to drive growth, the strategy has been embraced by the industry and enabled by Tourism NI's targeted marketing campaigns and supporting activities. This has directly resulted in a post pandemic recovery of ROI to NI trips, nights and spend (£233m) during 2022 each seeing increases of 50.6%, 41.6%, and 64.6% respectively, compared to 2019. Consumer sentiment research throughout 2022 and into 2023, indicated that approximately half of NI's visitors from ROI were visiting for the first time, presenting an opportunity to attract these visitors for a return visit. The ROI market is also stronger for regional dispersal than other markets.

### **North America**

In 2019 visitors from the North American market took 280,000 overnight trips in Northern Ireland, staying 1,341,000 nights and spending £79m (8% of total revenue in 2019). US and Canada visitors stayed on average 4.8 nights in Northern Ireland and spent on average, £281 per trip. For the majority of these visitors (62%), a holiday was their main reason for visiting Northern Ireland. Around one-third (32%) came to visit friends/relatives, with the remaining 6% visiting for business/other reasons. The US market accounts for 56% of the Incentive trips to Northern Ireland since 2019-20 and is Northern Ireland's largest market for incentive at present. Post covid, the US market has been recovering during the second half of 2022. The US market's desire to travel is evident and holiday makers are keen to make up for lost time. USA's historic political connections with Northern Ireland and a strong diaspora ingrain a strong connection between the US and the Island of Ireland. Canada too has an affinity with Northern Ireland, through diaspora and Scots Irish ties, and strong air access to the island with possible potential for a future direct route to NI.

Canadian visitors, like US visitors, will be familiar with the requirements of Electronic Travel Authorisations (ETAs).

Tourism Ireland forecast that visitors from North America will return to 2019 visitor number levels by 2024/25 and revenue spend by 2023/24. By 2030, North American revenue is forecast to increase by 35% on the 2019 level (by 11% in real terms).

### **Other Important Markets**

The French and German markets are also key sources of visitors from Mainland Europe. In 2019, France and Germany jointly accounted for 120,000 trips, 680,000 nights and £26m in overnight visitor spend. These closer to home European markets with direct access have proven to be strongly attracted to the type of tourism product on offer in Northern Ireland.

It is important to reiterate that the focus on these markets does not mean that opportunities in other markets will be ignored or not acted upon. However, these markets will be prioritised as they offer the greatest capacity to drive the sustainable growth and development required.



A scenic view of a rugged cliffside with a suspension bridge. The cliff is covered in green grass and has a rocky top. A suspension bridge with a metal mesh deck spans across a deep gorge. The sky is clear and blue. A white callout box with a white border is positioned over the cliffside, pointing towards the text below. The text is in a bold, blue, sans-serif font.

# **DRIVERS AND CHALLENGES FOR CHANGE**

## DRIVERS AND CHALLENGES FOR CHANGE

### Trends in consumer needs and requirements:

**Value for Money:** With significant increases in the cost of living and high inflation, consumer disposable income has seen a dramatic reduction. Despite the current economic uncertainty, there is still a strong desire for travel. Travellers will prioritise a trip that delivers strong value for money, however, will still expect high quality experiences.

### **Relaxation and Escapism:**

Motivations for travel vary among different market segments, but relaxation and getting away from it all are key reasons behind post pandemic travel. Linked to this, the trend of wellness travel continues. Travelling solo to get away from it all is on the rise particularly among young people.

**Authentic Experiences:** There is rising interest in unique and authentic experiences. Local excursions are likely to become increasingly popular as tourists search for authenticity in destinations that have a culture different to their own.

Immersive culinary journeys will allow travellers to sample local produce and screen tourism will provide unique experiences to a range of tastes.

**Sustainable Tourism:** There is more to the topic of sustainability than just the environmental focus. The social aspect of sustainability is equally important and, given the rising costs facing tourists and businesses, the economic aspect of sustainability is now more crucial than ever.

**Seamless Travel:** Aligning with relaxation being the top motivation for travelling, consumers want a seamless, hassle-free experience when taking a trip. They are interested in how the latest digital innovations can enhance their experience but still expect high quality, human-led hospitality.



### Challenges to the growth of the tourism sector:

As the targeted government interventions provided to support the tourism and hospitality sector survive and recover from the pandemic withdrew, as the sector opened up and restrictions were lifted, ongoing and new challenges and threats have put significant pressure on the industry again.

Many businesses are still recovering from the effects of the pandemic, experiencing cash flow difficulties with the need to pay back government loans amongst other financial and resourcing pressures.





**Economic Pressures:**

High inflation and unprecedented energy costs and constrained public expenditure resulting from the outbreak of the war in Ukraine in early 2022, increasing UK interest rates and an uncertain economic situation continue to present challenges for businesses in the tourism sector.



**Skills and Recruitment:**

Skills shortages and recruitment difficulties have been particularly exacerbated by the pandemic, with many employees leaving the sector and not returning. Prior to the pandemic, the tourism and hospitality sectors had a reputation of offering a poor work/life balance with long working hours and conditions, and a lack of career progression opportunities. Brexit also impacted the sector due to new immigration rules resulting in a significant number of EU nationals employed in the industry leaving NI.



**Reducing Carbon Emissions/Climate**

**Change:** Businesses will need to implement sustainable working practices in order to reduce their carbon footprint and use energy from more renewable sources. This will be a challenge for some businesses more than others and will require ongoing investment in order to support the delivery of energy reduction targets whilst ensuring that their tourism offer is sustainable to positively respond to changing consumer demands. Outdoor and nature-based attractions will play an important part in communicating a sustainable approach to visitors.

Significant strides have been made in addressing perceptions of the sector, however with a tight labour market, an ongoing focus on communicating the career opportunities and positive changes in employer terms and conditions will be required to ensure that access to a skilled workforce does not restrict sustainable growth of the sector. A potential solution lies in tourism's ability to address economic inactivity in both our urban and rural communities through bringing people who have been outside the labour market back into a working environment that can offer flexibility and tangible career options.



ONS statistics show that 1 in 3 employees in the sector are between the ages of 16 and 20 - for many young people it provides a path out of joblessness into the employment market. Across the UK, the tourism and hospitality sectors support almost half (46%) of all people aged under 24 in the UK workforce. The tourism industry provides a career path for school leavers into management and leadership that is rarely found across other sectors. The soft skills that young people are equipped with when working in tourism and hospitality are highly transferable to many occupations. As a socially important sector, it provides a route to greater social mobility for many within our most deprived city and rural communities. It provides jobs for less highly qualified or educated people and so can attract workers from a wide spectrum of society. In the longer term, the only way to resolve NI's social problems and dependency on benefits is to create meaningful employment opportunities for our young people who otherwise will continue to suffer from low aspirations and low self-esteem which in turn exacerbates economic inactivity. It is worth noting that a core characteristic of the tourism sector is the job intensive nature of the industry.

It is estimated that for every £ million output, tourism supports 31 jobs, substantially higher than the majority of other sectors, including construction (24 jobs) and telecommunications (7 jobs).



**Sustainable  
Market Connectivity:**

Given our dependency on both sea and air travel to remain competitive as a tourist destination, we will need to strike the balance between managing the risks associated with rising carbon prices and maintaining connectivity of airports between target tourist markets. Northern Ireland is physically remote from the rest of the UK and does not have the same road and rail connectivity options available. All direct flights to NI are from GB and mainland Europe and direct access from North America and long-haul markets is via the Republic of Ireland. Around two thirds of overseas (excluding GB) visitors to Northern Ireland arrive through the Republic of Ireland. There is a heavy reliance on air travel for both business and leisure travellers to and from NI. Attracting inbound visitors, access to tertiary education, and connecting the NI diaspora also depends heavily on aviation.



**Changing Government**

**Policy:** The UK government’s Borders and Nationalities Bill to introduce a new travel visa known as an ETA will be a requirement to all non-visa national visitors to Northern Ireland whether they arrive directly at a UK airport or ferry terminal. Some 70% of overseas tourists arrive in ROI first, mainly into Dublin, and include a visit to NI as part of their trip. The Department for the Economy is working with key stakeholders and the Home Office to inform the UKG communications campaign with the aim of ensuring that the ETA requirement will not deter overseas visitors from coming to Northern Ireland.



**Market Competition:**

Northern Ireland’s geographical location and the legacy of the Troubles, particularly regarding consumer perceptions, create a unique set of circumstances and challenges that are not faced by the other UK nations. Northern Ireland is a relatively immature tourism destination compared with the well-established industry infrastructure and destination attractiveness of the ROI.

The 52% growth in overnight visitor spend demonstrated in Northern Ireland between 2012 and 2019, was much higher than that experienced across Europe and the world. However, when compared with the revenue growth experienced by the ROI, our nearest neighbour, Northern Ireland’s growth pales in significance. ROI overnight tourism expenditure grew by 69% between 2012 and 2019, equating to an average annual growth of 9.8%.



**Technological**

**Advances:**

Advances in new technologies and the application of these, such as Artificial intelligence (AI) are moving very quickly. As consumers adapt to new technologies, travel and tourism businesses need to ensure that they are utilising the latest methods of engaging with potential customers and in the running of their day-to-day operations.



**Infrastructure Investment:**

In order to remain competitive and have a tourism infrastructure that supports our ambition, investment in visitor centric tourist attractions and accommodation, particularly in hotels outside Belfast, will be required.





**LOOKING TO THE FUTURE**

## LOOKING TO THE FUTURE

### Where are we going?

To fulfil the potential of our tourism industry in Northern Ireland we require a shared vision for the future; a vision which recognises the vital role tourism plays, and will continue to play, in showcasing the very best experiences of our incredible landscape. Not only for our international visitors but for our domestic visitors who can enjoy world class visitor experiences at home.

With new destination choices continually emerging, Northern Ireland is under intense pressure to remain both attractive and competitive. In this competitive environment, we must be authentic, distinctive, innovative, and creative in our approach.

In addition, there are a number of initiatives underway of mutual and synergetic benefit to the Tourism Economy. In the past co-operation has seen global events like “Giro d’Italia” deliver material benefit. Currently work is underway on an all-island Sustainability Certification programme, and opportunity to more seamlessly experience the North West by better aligning the offerings of the Causeway Coastal Route, Derry/Londonderry and Wild Atlantic Way.

The Department has identified its strategic intention through our 10x Vision. Aligning with this Vision, the Tourism Strategy provides a regional approach to growing tourism across Northern Ireland in the next 10 years. Our delivery partners, Tourism Northern Ireland and Tourism Ireland, are already embedded in the local tourism industry bringing a wealth of knowledge and expertise, providing support and guidance on local tourism strategies. These delivery partners will lead the sector in designing approaches and targeted programmes and prioritise interventions which will aggregate towards achieving the strategic aim and indicators of this Strategy, and ultimately contribute to the 10x Vision.

The Strategy will enable the region to capitalise on its uniqueness and authenticity to help market and promote Northern Ireland internationally as an attractive place to visit, whilst at the same time helping to make the lives better for those that live, work and study here.



**CASE STUDY**

## **FINN LOUGH**

**Finn Lough has been operating as a luxury accommodation provider since 1983, as a quiet hideaway nestled on a 100-acre peninsula resort, in County Fermanagh.**

With the next generation of owners taking over Finn Lough in 2012 they set out to develop the experience in a way that was eye catching, respectful and largely invisible within the forest surroundings. This led to the addition of the unique bubble domes in 2017. A bespoke private spa trail experience, set within the forest was also added. The sustainability merits of Finn Lough also evolved naturally with initiatives such as capturing and using rainwater and composting waste. As the only place to stay in a bubble dome on the island of Ireland, these take glamping to another level of luxury. They have received international recognition and attention and in 2017 Finn Lough Fermanagh was ranked as the coolest hotel in Ireland by The Times.

### **How will we get there?**

Five interrelated and interdependent Themes and associated Indicators have been developed to help ensure we support our businesses, entrepreneurs and innovators; boost economic productivity; expand career pathways; break down barriers for residents and visitors with disabilities; improve regional dispersal and increase off-season growth. Together these measures can contribute to the sustainable growth of our tourism industry and benefit our communities across the region.

It provides a framework for implementing the Vision and Mission of the Strategy and contributing to the aims of the 10x Economic Vision. Taking these steps will lay the foundation for future development in the tourism sector over the next 10 years as government (central and local), the tourism industry and wider stakeholders work together to achieve our Strategic Aim of increasing the value of tourism to the NI economy by 50 - 75% compared to 2019 and support the tourism economy to realise its potential for the future.



**CASE STUDY**

## **GLENSHANE COUNTRY FARM**

**Fourth generation sheep farmer Jamese McCloy opened up his family farm, Glenshane Country Farm, to tourism visitors in 2019. Since then he has embraced continuous development and improvement to sustainably grow his offer of a truly authentic Northern Irish experience to show an appreciation for the special landscapes of the Sperrins and to keep the traditional sheep farming practices alive.**

The visitor offering on the farm has recently been enhanced with the development of an iconic visitor centre, which not only enriches the quality of visitor services for the international visitor but increases capacity to attract additional leading international global tour operators.

Glenshane Country Farm has become a tourism destination driver and plays a pivotal role in collaborating with other tourism businesses within the destination to encourage longer stays and increased spend.

These Five Strategic Themes reflect the priorities identified in the 10x Performance Management Framework<sup>9</sup> and the associated Indicators provide a framework for implementing the Vision and Mission of the Strategy to enhance the contribution the tourism sector is already making to the implementation of the principles of the 10x Vision.

Achieving any one of the Indicators will not be enough; delivery against **all** of the indicators will reinforce that tourism can deliver economic, social and environmental benefits accelerating tourism's contribution towards a more innovative, inclusive and sustainable economy.

9 [10x-performance management framework consultation document](#)



# STRATEGIC THEMES

## Inclusive

A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.



## Innovative

We will build on our culture of innovation and creativity to deliver positive change. We will pursue excellence and world class ideas to make our industry more competitive and sustainable.



## Attractive

To inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit. Our spirit will set us apart and make Northern Ireland a great place to work, live, visit and invest.



## Sustainable

We will build upon Northern Ireland's unique journey of regeneration. We will evolve our tourism ecosystem to be greener and sustain and invigorate our people, our place and our natural environment. We inspire future generations to thrive.



## Collaborative

We collaborate widely in a spirit of true partnership. We nurture a shared vision and common clarity of purpose.



## WHAT WILL SUCCESS LOOK LIKE?



### STRATEGIC THEME ONE: **INNOVATIVE**



**10x Vision:** 'A focus on innovation is increasing incomes, improving productivity levels, providing opportunities for all our people, creating a net zero economy and showcasing our brilliance.'

**Tourism Strategy:** We will build on our culture of innovation and creativity to deliver positive change. We will pursue excellence and world class ideas to make our industry more competitive and sustainable.

The Covid-19 pandemic hit the tourism sector harder than any other and, as a result, the sector had to be **innovative** in its response, embracing ways to mitigate the impact and not only kickstart its recovery efforts but also build for the future of the sector. The sector has demonstrated its resilience and ability to successfully respond to the toughest of challenges, displaying creativity and agility to

move with changing consumer trends. Research, insights and data analytics have allowed the sector to develop products aligned to market needs including digitisation and using new technologies to attract tourists, maturity of VR and IR and sector diversification, providing new and innovative experiences and activities for visitors and local communities alike.



To meet rapidly changing demands from international and domestic tourists it will be important to support small businesses – who make up 89%<sup>10</sup> of the Northern Ireland economy - to operate online and have the ambition to reach new international markets, to create a sustainable sector where everyone can use technology

ensuring our tourism offer remains competitive internationally. Focussing our innovation and entrepreneurship in areas where we have real strengths can create a more sustainable future for all, not only increasing the quality of the experience for visitors but also improving the quality of life for our residents.

### What Innovative success looks like

- Use creative ideas and methods to develop new products or services to maximise benefits.
- Capitalise on new and emerging technologies to develop solutions to tourism industry challenges.
- Tourism workforce has the right digital skills to ensure that they meet the needs consumers' evolving needs.
- Use real time quantitative analytics and insights to develop, market and monitor performance of our tourism offer.

### Innovative Indicators

Creating new and innovative tourism experiences:

- Annual Increase in the number of our tourism businesses receiving Innovate NI recognition levels.
- Annual Increase in the number of high value-added business start-ups and entrepreneurial levels within the tourism sector.
- Increase the export value of the tourism sector measured by expenditure from overnight visitors from outside Northern Ireland.
- Annual Increase in the number of tourism businesses participating in Tourism Innovation Programmes.
- Annual Increase in the number of meetings, incentives, conferences and business events aligned with the 10x strategy to position Northern Ireland as a place to innovate.

<sup>10</sup> In March 2022, the majority of businesses (89 per cent, 70,510) in Northern Ireland were micro-businesses (less than 10 employees). Just over 2 per cent (1,640) of businesses had 50 or more employees. Source: [DfENIBusinessActivityJune2023](#)

**STRATEGIC THEME TWO:**  
**INCLUSIVE**



**10x Vision:** All people across Northern Ireland are benefitting from improved economic prosperity, there is a fairer distribution of opportunities for all our people and there are better opportunities for our young people.

**Tourism Strategy:** A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.

Creating an environment that our people are proud to call home with a high quality offering requires businesses to have the right amount of people with the right skills working in the sector. Tourism is people oriented. It has a major role to play in delivering an **inclusive** balanced sub-regional growth and has the potential to address economic inactivity in both our urban and rural communities. It is one of the few industry sectors which has the potential to create substantial employment across every part of Northern Ireland and within every section of our society. By placing an emphasis on our people, their skills and professionalism we can enhance the attractiveness of Northern Ireland as a world class visitor destination.

A challenge for the sector is the image of tourism as a career choice. Without a confident, well trained and

professional workforce we have no visitor experience. Therefore, there is an urgent need to address the identified skills gaps and shortages within the tourism sector and develop tourism career opportunities and life-long career pathways, creating a sector that people of all ages aspire to work in.

To deliver the strategy, the ability to further drive sustainable regional and seasonal growth will also be dependent upon the development of a number of tourism hubs across Northern Ireland.

These hubs, which have the right mix of accommodation, attractions, experiences and a vibrant evening economy to meet the needs of the tourist, will provide a base from which visitors can explore the surrounding area on every day of the week on a year-round basis.



These hubs are likely to already have a minimum level of tourism infrastructure or be close to attractions with substantial growth potential and have the potential too, to contribute to the placemaking priority in 10x. It will be critical that these destination hubs can offer

all of the key requirements for the visitor to ensure that they do not just become a day trip destination with visitors migrating back to Belfast for their overnight stay. Regenerative investment will be required in new tourism and retail infrastructure to ensure success.

### What Inclusive success looks like

- More sectors of the economy across the whole of Northern Ireland will benefit from tourism.
- Tourism investment, conferences and events have tangible benefits to local communities.
- The sector is actively engaged with local communities as valued stakeholders in tourism development and delivery.
- Tourism is an inclusive employer offering a diverse range of desirable career paths throughout Northern Ireland.

### Inclusive Indicators

Contributing to a more inclusive economy:

- Improve the Work Quality<sup>11</sup> for the tourism sector, including competitive salaries, career pathways, opportunities to secure qualifications and comfortable working conditions, creating an accessible, competitive and attractive industry in which to work.
- Annual Increase in the number of employees within the tourism sector from underrepresented groups (including people who are economically inactive, people with disabilities, and from deprived areas) contributing to an equitable distribution of opportunities to all our people.

11 [Work Quality in Northern Ireland - July 2021 to June 2022 | Northern Ireland Statistics and Research Agency \(nisra.gov.uk\)](https://www.nisra.gov.uk)

**CASE STUDY**

# **GALGORM COLLECTION**

**Through its strong leadership commitment, inclusive policies, diverse workforce, comprehensive training programs, and a welcoming guest experience, Galgorm Collection creates a vibrant and inclusive environment where everyone feels valued, respected, and empowered. It recently became the first hospitality group on the island of Ireland to achieve official Great Place to Work certification.**

Its recruitment practices focus on attracting talent from diverse backgrounds, leveraging collaborations with Community organisations such as a strategic partnership with the NOW Group, and creating its own academies to remove barriers to employment whilst seeking to address the current skills shortage.

The Galgorm Collection continues to work with the local council and colleges to strengthen its employer credentials and grow new talent through its School of Excellence and Spa Scholarship. In 2021, it partnered with a local charity and two other local hotels to launch the Northern Ireland Hospitality School and in 2022 the Galgorm Collection launched a new Chef Academy.





## STRATEGIC THEME THREE: **SUSTAINABLE**



**10x Vision:** Tourism is supporting a greener, more sustainable economy which is delivering positive economic, environmental and societal outcomes.

**Tourism Strategy:** We will build upon Northern Ireland's unique journey of regeneration. We will evolve our tourism ecosystem to be greener and sustain and invigorate our people, our place and our natural environment. We inspire future generations to thrive.

The growing global demand for responsible tourism – including climate consciousness, sustainable tourism, environmental tourism and a desire for culturally and socially enriching activities – has been in part driven by legislation, an increasing sense of corporate responsibility but, most importantly, as a result of consumer expectations. This has accelerated the need to develop new and innovative products and services which are more **sustainable**.

Promoting tourism developments with a low environmental footprint takes into consideration the UN Sustainable Development Goals (SDGs)<sup>12</sup> which strives for a better and more sustainable future for all through economic growth, reducing poverty, supporting cultural heritage and environmental sustainability.

These can lead to improving the experience for our tourists and also the quality of life for our residents.

Sustainable Travel International estimates that 8% of the world's carbon emissions are generated by activities relating to tourism, including the fuel required to fly passengers to their destination. Northern Ireland has a high dependency on tourists arriving via sea and air. In 2019, of the 5.3 million overnight trips taken in Northern Ireland, around 3 million (56%) of these were taken by external visitors (visitors originating from outside of NI). In December 2019, Northern Ireland air passenger flow for the previous 12 months was recorded at 8.9 million, demonstrating NI's airplane dependency at the time.

<sup>12</sup> <https://sdgs.un.org/goals>

**CASE STUDY**

## **BROOK HALL ESTATE**

**For over thirty years, the historic estate of Brook Hall located on the banks of the River Foyle has actively committed to researching and promoting renewable energy, environmental, and landscape management strategies to achieve genuine sustainability and inspire behavioural change; becoming the first heritage landscape in Northern Ireland to be measurably beyond carbon neutral.**

Keen to share the impact of their sustainability practices, David Gilliland, the sixth generation living at Brook Hall, developed a series of innovative tourism experiences which take visitors on a journey through the heritage, nature, and sustainability of the demesne. Experiences include a guided tour of the willow farm and biomass processing facilities followed by a series of experimental activities across the wider estate and gardens, exploring the soil health and biodiversity within the landscape along the way.

The vulnerability in this dependency was exposed due to the fact that, during the COVID-19 pandemic, global connectivity with air traffic into Northern Ireland's three airports reduced by 85% in early 2020<sup>13</sup>.

Given our dependency on both sea and air travel as part of our external tourism, to remain competitive as a tourist destination, we will need to strike the balance between managing the risks associated with rising carbon prices and maintaining connectivity of airports between target tourist markets.

The sustainability of NI's future air connectivity is hugely important in light of the obligations of the Climate Change Act (NI) 2022. International aviation will be subject to the targets in the Climate Change Act and air carriers will be expected to reduce or offset carbon emissions.

Northern Ireland is physically remote from the rest of the UK and does not have the same road and rail connectivity options available. There is a heavy reliance on air travel for both business and leisure travellers to and from NI.

13 [Research of future tourism Northern Ireland](#)



Attracting inbound visitors, access to tertiary education, and connecting the NI diaspora also depends heavily on aviation. By working with the Department of Agriculture, Environment and Rural Affairs who are leading on the development of Northern Ireland's first Climate Action Plan which will cover the period 2023 to 2027, and with the UK Department for Transport, we have the opportunity to co-ordinate our approach rather than make separate regulations for emissions of greenhouse gas from domestic and international aviation.

Progressing sustainable practices involves finding new ways to reduce the sector's carbon footprint, including promoting the circular economy; caring for our natural environment; protection and conservation of our cultural, natural and built heritage; advocating local businesses by supporting locally produced goods and services, in turn helping the local economy; enhancing our outdoor experiences; and support our businesses to develop quality sustainable products and experiences and ultimately to embark on a journey towards sustainability accreditation.

#### **What Sustainable success looks like**

- Tourism will be a key driver of green growth and will make a full contribution to NI's ambition to become a net-zero society.
- Tourism will bring benefits to the local community for future generations.
- Tourism businesses in Northern Ireland will become more self-sustaining, agile and resilient.
- Sustainability will be at the heart of Tourism, we will develop and manage tourism effectively and responsibly.

#### **Sustainable Indicators**

Supporting a greener and more sustainable economy:

- Support the tourism sector to become more sustainable through an annual increase in participation in a tourism specific Sustainability Accreditation scheme.
- Improve regional dispersal and seasonal growth of the tourist offering to enhance Northern Ireland as a competitive all year-round tourist destination.
- Support tourism businesses towards becoming carbon neutral.

**CASE STUDY**

## **LIFE ADVENTURE CASTLEWELLAN**

**Life Adventure, located within Castlewellan Forest Park, is on the edge of the Mourne Mountains. Owned by Martin McMullan, the company has been at the core in the development of many key activity tourism products and services across the Mournes, tapping into the unique outdoor assets the Mournes has to offer. The company's site at Castlewellan Adventure Centre covers paddle board, kayak and mountain bike adventures and hire, coupled with the development of a new 'Bike Mourne' with two new outlets at the Rostrevor Mountain Bike Trails and in Newcastle with a particular focus on electric bikes. The big focus is on sustainability, increasing the attractiveness of the destination, facilitating responsible visitors and activity and providing direct and in-direct economic benefits across the destination.**

The careful restoration of the heritage courtyard visitor centre provides comfort and functionality while retaining the unique and authentic character of the building itself. Life Adventure have achieved a carbon neutral status, recognised by a 'Gold Award' certification from Green Tourism UK.

The business has also invested in their people assets to ensure high standards of service, reinforced by their 'Adventure Mark' accreditation, a kite mark for quality provision in the adventure activity industry.



**STRATEGIC THEME FOUR:**  
**ATTRACTIVE**



**10x Vision:** We are building on our success in attracting visitors to world class, experiences and events, energising our ecosystem through innovation and collaboration.

**Tourism Strategy:** To inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit. Our spirit will set us apart and make Northern Ireland a great place to work, live, visit and invest.

It is also important to consider the sustainability of the tourism sector in Northern Ireland to ensure long-term resilience in a more agile way and protect and accelerate the future of the sector both in terms of regional spread and seasonal growth. A key challenge for any destination is overcrowding at popular resorts and attractions, especially during peak seasons and it will be important to promote Northern Ireland as an **attractive** year-round destination, promoting experiences that offer variety, quality and authenticity – the things that make Northern Ireland special.

The importance of sustaining the domestic and closer to home markets cannot be overemphasised. The domestic market is vital to the season extension and regional dispersal as it provides the sector with a loyal

customer base and counters, to some degree, the current seasonality of external visitors.

**Tourism is about place making** - its success is based on developing and caring for local attractions and amenities and managing growth so it enriches the lives of local residents as well as visitors. The quality of Northern Ireland's natural environment and cultural offering makes the region ideally placed for the further development of tourism attractions and experiences.

Over the next few years, Northern Ireland will benefit from a package of investment from four City and Growth Deals. The combined funding from the NI Executive and the UK government will total £1.3bn which will also be complemented by private sector and other sources of funding.

This investment package provides an opportunity for a further step change in the visitor offering, helping to deliver benefits across the region in an inclusive and sustainable way.

It will increase tourism's contribution to local economies through job creation, and additional incomes for residents and business across all parts of the sector. Sustainability

and inclusion will be at the heart of an approach which seeks to achieve strong connections between people, place and prosperity.

As globally compelling propositions, the projects are designed to appeal to key international markets and will inspire future visitors to stay longer and to spend more in our local communities.

#### **What Attractive success looks like**

- Deliver high quality, memorable and authentic experiences, making Northern Ireland renowned as a unique and prime location for international visitors and investors.
- We have a clear brand and reputation of having a big-hearted, pioneering, legendary and elemental spirit.
- Our tourism offer is varied with rich experiences and across Northern Ireland all year round.
- We will be responsive to changing trends in customers' needs.

#### **Attractive Indicators**

Promoting Northern Ireland as an attractive place to visit:

- Enhance our international profile and tourism appeal as measured by Northern Ireland's Net Promoter Score.
- Annual Increase in number of return visitors and/or visitor average length of stay to fuel local and regional economic growth.
- Secure a portfolio of distinctive, high-quality sustainable tourism conferences and events which underpin and optimise Northern Ireland's attractiveness as a dynamic tourism destination.



**CASE STUDY**

## **EBRINGTON**

**Ebrington is a 29-acre heritage asset situated on the Foyle riverfront. Initially built by the army in 1841, the military base was home to the British military in Derry-Londonderry until 2001 when the site was gifted by the Ministry of Defence to the Executive Office.**

The Peace Bridge, which itself has become a major tourist attraction in Derry-Londonderry, connected the site to the Walled City when it opened in 2011 and was the catalyst for the redevelopment of the site as a new public space in the city.

The transformation of the former parade grounds into Ebrington Square, a world class events space attracts hundreds of thousands of visitors each year to major events such as the Maritime and Halloween Festivals, BBC Radio 1's Big Weekend and hosted the Turner Prize during the UK City of Culture in 2013.

The former soldier and officer accommodation quarters have been transformed into the stunning, Ebrington Hotel and Spa, which opened in June 2023.

Three of the buildings flanking the hotel are soon to become the new Derry North Atlantic Maritime Museum with support from Tourism NI, Department for Communities and The Executive Office.

Ebrington is a living demonstration of how tourism can not only protect our built environment, so it is enjoyed by residents and visitors alike, but in doing so create vibrant spaces which encourage creative industries to invest there as well.

STRATEGIC THEME FIVE:  
**COLLABORATIVE**



**10x Vision:** We have created clusters which have built upon existing strengths and capitalising on windows of opportunity.

**Tourism Strategy:** We collaborate widely in a spirit of true partnership. We nurture a shared vision and common clarity of purpose.

Crucial to the success of the Tourism Strategy: Ten Year Plan the willingness for **collaborative** working. If our tourism industry is to be successful and sustainable all partners must work together to meet and exceed the expectation of our visitors by giving them an experience they will never forget.

Tourism is the responsibility of many stakeholders, all of whom have a part to play in delivering our vision. Those stakeholders are wide and varied. They include:

- Those government departments and their agencies who are responsible for maintaining our landscape and built heritage, providing transport infrastructure, supporting culture and the arts, licencing laws and regulatory services, rural development, urban regeneration and the provision of broadband and telecommunication services.
- **The Department of Agriculture, Environment and Rural Affairs (DAERA)** DAERA has a vision for sustainability at the heart of a living, working, active landscape valued by everyone and has a key role in championing thriving rural communities that contribute to prosperity and wellbeing. DAERA recognises the economic and social benefits that sustainable rural tourism can bring to rural communities and is committed to working in collaboration with DfE, Tourism NI and other key stakeholders to maximise these benefits and to showcase the tourism opportunities of Northern Ireland's wonderful environment and its world class food and drink production. DAERA also recognises the challenges in relation to tourism in rural areas including access to sustainable transport options, access to quality broadband and



telecommunications, the impact of climate change and the need to safeguard rural tourism assets. DAERA will continue to provide support to DfE, Tourism NI and local councils with implementing the Rural Needs Act (NI) 2016 to help ensure that the social and economic needs of people in rural areas are appropriately considered and to help deliver better and more sustainable outcomes for rural communities, rural businesses and people visiting rural areas for the purposes of tourism.”

- **The Department for Communities (DfC)** DfC’s common purpose is supporting people, building communities and shaping places. The Department’s work in supporting place-based regeneration, including significant interventions through the City and Regional Growth Deals in places such as Carrickfergus and Derry~Londonderry, provides places that are attractive to residents and visitors alike. It provides overall support for the large and diverse voluntary and community sectors which support all strands of what makes our places authentic and distinctive. It has a lead role in supporting the

development of sport and physical activity, with its intentions brought together in Active Living, the Sport and Physical Activity Strategy for Northern Ireland, recognising that many visitors travel to Northern Ireland in association with sporting activity. And it has a lead role in the support and development of Northern Ireland’s culture and heritage – key drivers for our tourism industry. A Culture, Arts and Heritage strategy is in preparation, building on the ongoing work across the sectors which has been refined and reshaped to build back from the challenges and opportunities presented by the Covid pandemic. This recognises the ways in which our culture, arts and heritage support our prosperity, strengthens our society, and shapes our character. The particular interface between our culture and heritage, and our attractiveness to visitors, has been strengthened in recent years, following joint activity during the 2018 European Year of Cultural Heritage which has developed into a joint programme of work coordinated by a Leadership Group of cultural, heritage and tourism representatives.

- **The Department for Infrastructure (Dfi)** To compete globally Northern Ireland needs to be well connected both internally and with the rest of the world. Gateways are strategically important transport interchanges which are important for economic development, tourism and employment generation. The quality of connection from the air and seaports to the internal transport network in Northern Ireland is crucial for tourism and economic competitiveness of the region and the convenience of the travelling public. Any visitor to Northern Ireland will enter the province by one of these gateways whether that be our ports, airports or transport networks to and from the Republic of Ireland.

Dfi has the prime responsibility in Northern Ireland for the development and management of key transport infrastructure and services to and from gateways and across the region. Dfi recognises the crucial role played by tourism in driving economic growth and through promoting our region. A key focus of the Department is to ensure that visitors arriving here have easy access to all parts of the province through the transport network.

Dfi has invested heavily in the upgrade of transport infrastructure and services in the last number of years to improve the accessibility of our transport network to gateways and key tourist sites. This has included upgrading of our major roads on our Strategic Road Network like the A1 to Dublin, A4 to Enniskillen, A6 to Derry/ Londonderry, A8 to Larne and A26 to the North Coast. Given the need to significantly and urgently reduce transport emissions, in line with commitments within the Climate Change Act and associated carbon budgets, the Department has also invested heavily in new and improved public transport on both our bus and rail network including the development of new transport hubs in Belfast, Portrush and the North West. Increased frequency and capacity of rail services and the expansion of zero emission buses will help to reduce our carbon emissions. The Department is working with Local Councils to develop more sustainable travel options for tourism including the development a range of greenways across the region. It also is committed to working with Local Councils to provide additional, reliable, EV infrastructure throughout Local Council regions.



- **The Executive Office** As a Devolved Administration, there are limitations to our international role as international relations remain formally an excepted matter. However, it is well established that we can and should build relationships with international partners, on matters within the devolved competence. The Executive Office International Relations team coordinate and maximise the international activities of all NICS departments with a view to ensuring that Northern Ireland is a place where people want to live and work, to visit, study and invest. The TEO team seek to influence governments and their stakeholders to respond positively to Northern Ireland's priorities and view us as a favourable trading and knowledge exchange partner, encouraging mutual exchange of people and ideas, tourism and beneficial business relationships by working with partners across government to foster and cultivate an understanding at home of the benefits and opportunities from international engagement (business, policy and tourism led) and create a greater desire to pursue those opportunities.
- Our eleven Councils also have a role to play as they manage many of our visitor attractions, run our Tourist Information Centres, deliver festivals conferences and events and ensure our towns and villages are attractive and safe places in which to live and visit.
- Businesses within the tourism industry - which are wide ranging in size, from micro enterprises to large international hotel chains – and their representative organisations are key to making Northern Ireland tourism flourish.
- Tourism NI and Tourism Ireland, both of whom play a critical role in the development and promotion of the Northern Ireland tourism product both at home and overseas.
- Tourism NI's work on the development of three thematic Visitor Experience Development Plans (Food and Drink, Culture and Heritage and Landscapes and Activity Tourism) is to support the development of market-led tourism experiences which will set Northern Ireland apart in the international marketplace.
- Tourism NI is working with both DAERA and DFC in the development of these plans, ensuring alignment with respective strategies.

- Tourism NI has worked in collaboration with DAERA in delivery of key actions within the Tourism Recovery Action Plan to ensure we enhance the competitiveness of the region. For example, this has included the development of a new DAERA Rural Tourism Investment Scheme to build on the 2014-2020 £10 million Rural Tourism Scheme.
- There is also engagement with the DFI on the development of public transport routes relevant to tourism and also with Translink. Licensing and events management are two further areas where Tourism NI is actively involved with DfC and the Department of Justice.
- Numerous charities and voluntary organisations which provide services to our visitors such as the National Trust who manage some of our most iconic visitor attractions.





Key to making NI tourism industry flourish lies with the industry itself and the businesses and organisations at its heart.

Working together in clusters can unlock huge potential – local businesses who have an affinity in areas where it is easy and natural for them to work together can enhance the offering for new and returning domestic and international visitors.

It can improve their own sales performance but being knowledgeable about other tourism activities in their area can spread the benefits to other local businesses, create jobs and strengthen the local economy. Councils too have a pivotal role to play in presenting what the region has to offer, supporting the expansion of tourism right across the region.

#### **What Collaborative success looks like**

- Collaboration will be embedded within the Sector, Government and key strategic partners to bring benefits to the whole of Northern Ireland.
- The Sector will work together to develop creative products and services that maximise opportunities across Northern Ireland.
- Government will work together at a local, regional and national level to align strategic priorities.
- Industry will work with local communities to ensure they experience the benefits of Tourism.



**CASE STUDY**

## **AND SUSTAINABLE GIANTS**

**Launched in 2022, AND Sustainable Giants are a collaborative group of tourism businesses who actively demonstrate commitment to providing a sustainable choice for visitors to Ards & North Down; helping to make the destination climate-ready and recognised as a sustainable destination to live, work and experience. Their goal is to position themselves at the forefront of green and sustainable practices leading to the achievement of a ‘green destination status’.**

Sustainable Giant businesses commit to a charter of six key principles of sustainability, including protecting the natural environment, working to ensure that tourism has a positive contribution to the social sustainability of local communities, employing local people and using ethical products wherever possible.

Through a collaborative approach, the members work together to encourage visitors to come to the area more often, stay longer and spend more, whilst helping to enrich communities, improve the environment and support growth of local businesses.





**STRATEGY ON A PAGE**

# TOURISM STRATEGY FOR NORTHERN IRELAND

## 10 YEAR PLAN

TOURISM STRATEGY GOAL	OUR VISION	STRATEGIC INTENTIONS	HOW WILL WE GET THERE?	WHAT WILL SUCCESS LOOK LIKE?
<p>Tourism Growth is:</p> <p><b>INNOVATIVE</b> and uses our creative skills</p> <p><b>INCLUSIVE</b> bringing opportunities for all</p> <p><b>SUSTAINABLE</b> for generations</p> <p><b>ATTRACTIVE</b> to visitors and investors</p> <p><b>COLLABORATIVE</b> to deliver a shared vision</p>	<p>Establish Northern Ireland as a year-round world class destination, which is renowned for its authentic experiences, landscape, heritage and culture and which benefits communities, the economy and the environment, with sustainability at its core.</p> <p><b>OUR MISSION</b></p> <p>To support the tourism sector in building an innovative, sustainable and inclusive tourism industry for all people and places in Northern Ireland which enriches its people, its economy and its guests.</p>	<ul style="list-style-type: none"> <li>Build on our culture of innovation and creativity to deliver positive change. We will pursue excellence and world class ideas to make our industry more competitive and sustainable.</li> <li>A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.</li> <li>Build upon Northern Ireland's unique journey of regeneration. We will evolve our tourism ecosystem to be greener and sustain and invigorate our people, our place and our natural environment. We inspire future generations to thrive.</li> <li>Inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit. Our spirit will set us apart and make Northern Ireland a great place to work, live, invest and visit.</li> <li>Collaborate widely in a spirit of true partnership. We nurture a shared vision and common clarity of purpose.</li> </ul>	<p><b>Creating new and innovative tourism experiences:</b></p> <ul style="list-style-type: none"> <li>Annual Increase in the number of our tourism businesses receiving Innovate NI recognition levels.</li> <li>Annual Increase in the number of high value-added business start-ups and entrepreneurs levels within the tourism sector.</li> <li>Increase the export value of the tourism sector measured by expenditure from overnight visitors from outside Northern Ireland</li> <li>Annual Increase in the number of tourism businesses participating in Tourism Innovation Programmes</li> <li>Annual Increase in the number of meetings, incentives, conferences and business events aligned with the 10x strategy to position Northern Ireland as a place to innovate.</li> </ul> <p><b>Contributing to a more inclusive economy:</b></p> <ul style="list-style-type: none"> <li>Improve the Work Quality<sup>14</sup> for the tourism sector, including competitive salaries, career pathways, opportunities to secure qualifications and comfortable working conditions, creating an accessible, competitive and attractive industry in which to work.</li> <li>Annual Increase in the number of employees within the tourism sector from underrepresented groups (including people who are economically inactive, people with disabilities, and from deprived areas) contributing to an equitable distribution of opportunities to all our people.</li> </ul> <p><b>Supporting a greener and more sustainable economy:</b></p> <ul style="list-style-type: none"> <li>Support the tourism sector to become more sustainable through an annual increase in participation in a tourism specific Sustainability Accreditation scheme.</li> <li>Improve regional dispersal and seasonal growth of the tourist offering to enhance Northern Ireland as a competitive all year-round tourist destination.</li> <li>Support tourism businesses towards becoming carbon neutral.</li> </ul> <p><b>Promoting Northern Ireland as an attractive place to visit:</b></p> <ul style="list-style-type: none"> <li>Enhance our international profile and tourism appeal as measured by Northern Ireland's Net Promoter Score.</li> <li>Annual Increase in number of return visitors and/or visitor average length of stay to fuel local and regional economic growth.</li> </ul>	<p><b>Innovative</b></p> <ul style="list-style-type: none"> <li>Tourism workforce has the right digital skills to ensure that they meet consumers' evolving needs.</li> <li>Use real time quantitative analytics and insights to develop, market and monitor performance of our tourism offer.</li> <li>Use creative ideas and methods to develop new products or services to maximise benefits.</li> <li>Capitalise on new and emerging technologies to develop solutions to tourism industry challenges.</li> </ul> <p><b>Inclusive</b></p> <ul style="list-style-type: none"> <li>More sectors of the economy across the whole of Northern Ireland will benefit from tourism.</li> <li>Tourism investment and events have tangible benefits to local communities.</li> <li>The sector is actively engaged with local communities as valued stakeholders in tourism development and delivery.</li> <li>Tourism is an inclusive employer offering a diverse range of desirable career paths throughout Northern Ireland.</li> </ul> <p><b>Sustainable</b></p> <ul style="list-style-type: none"> <li>Tourism will be a key driver of green growth and will make a full contribution to NI's ambition to become a net-zero society.</li> <li>Tourism will bring benefits to the local community for future generations.</li> <li>Tourism businesses in Northern Ireland will become more self-sustaining, agile and resilient.</li> <li>Sustainability will be at the heart of Tourism, we will develop and manage tourism effectively and responsibly.</li> </ul> <p><b>Attractive</b></p> <ul style="list-style-type: none"> <li>Deliver high quality, memorable and authentic experiences, making Northern Ireland renowned as a unique and prime location for international visitors and investors.</li> <li>We have a clear brand and reputation of having a big-hearted, pioneering, legendary and elemental spirit.</li> <li>Our tourism offer is varied with rich experiences and across Northern Ireland all year round. (for example in culture, social, escape, sport, business and screen)</li> <li>We will be responsive to changing trends in customers' needs.</li> </ul> <p><b>Collaborative</b></p> <ul style="list-style-type: none"> <li>Collaboration will be embedded within the Sector, Government and key strategic partners to bring benefits to the whole of Northern Ireland.</li> <li>The Sector will work together to develop creative products and services that maximise opportunities across Northern Ireland.</li> <li>Government will work together at a local, regional and national level to align strategic priorities.</li> <li>Industry will work with local communities to ensure they experience the benefits of Tourism.</li> </ul>
<p><b>PURPOSE</b></p> 	<p><b>OUR STRATEGIC AIM</b></p> <p>To increase the value of tourism to the Northern Ireland economy by 50-75% compared to 2019.</p>			

14 Report of work quality indicators in Northern Ireland for the period July 2021 to June 2022





# **ALIGNMENT OF INDICATORS WITH 10x METRICS**



# ALIGNMENT OF INDICATORS WITH 10x METRICS

## INNOVATION



### 10x Tier 1 Metrics

- Increase total R&D expenditure by 55%.
- Increase the number of R&D performing businesses by 450.
- Increase number of innovation active firms to 55% of NI businesses
- 10% of NI businesses receiving Innovation Accreditation.
- Increase proportion of individuals leaving NI HE institutions with first degrees and post-graduate qualifications in narrow STEM subjects from 24% to 27%.

### 10x Tier 2 Underpinning Metrics

- Number of R&D Companies.
- R&D Companies by (employee) size, ownership, location, sector.
- Number of Innovation Driven Enterprises (IDEs) (subject to data availability).
- Innovation Accreditation.
- Entrepreneurship.

### Tourism Strategy Indicators

Creating new and innovative tourism experiences:

- Annual Increase in the number of our tourism businesses receiving Innovate NI recognition levels.
- Annual Increase in the number of high value-added business start-ups and self-sustaining levels within the tourism sector.
- Increase the export value of the tourism sector measured by expenditure from overnight visitors from outside Northern Ireland.
- Annual Increase in the number of tourism businesses participating in Tourism Innovation Programmes.
- Annual Increase in the number of meetings, incentives, conferences and business events aligned with the 10x strategy to position Northern Ireland as a place to innovate.

# INCLUSIVE



## 10x Tier 1 Targets

- Increase Northern Ireland Household Disposable Income above the SAE average while maintaining NI as one of the top performing SAEs in relation to the Gini-coefficient (a measure of income equality)
- Close the employment gap between men and women; people with disabilities and people without; and most deprived area of NI and the least deprived area of NI
- Increase the proportion of the working age population with qualifications at level 3 and above from 57.2% (2020) to 70%-75%

## 10x Tier 2 Targets

- Employment rate/gap by gender, age, disability, geography, MDM
- Proportion of the working age population with qualifications at level 2 and above or level 3 and above. Broken down by gender, age, disability, geography, MDM
- Career progression by gender, age, disability, geography, MDM
- Economic inactivity by gender, age, disability, geography, MDM
- Disability and gender pay gap
- Work quality indicators for a 'Good jobs' metric

## Tourism Strategy Indicators

Contributing to a more inclusive economy:

- Improve the Work Quality<sup>15</sup> for the tourism sector, including competitive salaries, career pathways, opportunities to secure qualifications and comfortable working conditions, creating an accessible, competitive and attractive industry in which to work.
- Annual Increase in the number of employees within the tourism sector from underrepresented groups (including people who are economically inactive, people with disabilities, and from deprived areas) contributing to an equitable distribution of opportunities to all our people.

15 [Work Quality in Northern Ireland - July 2021 to June 2022 | Northern Ireland Statistics and Research Agency \(nisra.gov.uk\)](https://www.nisra.gov.uk)



## SUSTAINABILITY



### 10x Tier 1 Targets

- 80% electricity consumption from renewable sources
- Greenhouse gas emissions 48% lower than baseline
- Double the size of NI's low carbon and renewable energy economy to more than £2bn turnover

### 10x Tier 2 Targets

- Energy-related greenhouse gas emissions
- Business energy purchases relative to turnover
- Energy efficiency indicators

### Tourism Strategy Indicators

Supporting a greener and more sustainable economy:

- Support the tourism sector to become more sustainable through an annual increase in participation in a tourism specific Sustainability Accreditation scheme.
- Improve regional dispersal and seasonal growth of the tourist offering to enhance Northern Ireland as a competitive all year-round tourist destination.
- Support tourism businesses towards becoming carbon neutral.

## ATTRACTIVE



### Tourism Strategy Indicators

Promoting Northern Ireland as an attractive place to visit:

- Enhance our international profile and tourism appeal as measured by Northern Ireland's Net Promoter Score.
- Annual Increase in number of return visitors and/or visitor average length of stay to fuel local and regional economic growth.

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**MID ULSTER DISTRICT COUNCIL'S  
RESPONSE TO DEPARTMENT FOR ECONOMY'S CONSULTATION  
ON DRAFT TOURISM STRATEGY FOR NI - 10 YEAR PLAN**

**January 2024**

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## **1.0 INTRODUCTION**

Mid Ulster District Council (the Council) welcomes this opportunity to respond to the Department for the Economy (DfE) consultation process on the draft Tourism Strategy 2024-2034.

The stated purpose of this strategy is to:-

- provide a framework for the national tourism bodies Tourism Northern Ireland and Tourism Ireland to work with public authorities (i.e., Mid Ulster District Council) to shape and develop strategies that can maximise opportunities via the domestic and global marketplace
- create opportunities to spread sustainable, economic, social and environment benefits in **all** parts of Northern Ireland, **all** year round
- enhance the quality of life for citizens and deliver a quality experience for visitors
- position tourism at “the heart of everything” in Northern Ireland
- leverage opportunities generated via strong tourism destinations to positively position Northern Ireland as a place to visit, study, live, work and (importantly for Mid Ulster) to invest
- support the wellbeing and prosperity of urban and rural communities (i.e. Mid Ulster) and safeguarding rural tourism assets

The Council's response includes commentary requested by DfE's Consultation Questionnaire and also sets out the critical issues that need to be addressed to enable Mid Ulster to achieve the growth ambition outlined in the draft Tourism strategy aligned with the district's ambition to become a high-performing tourism economy. This response shares collective feedback following:-

- consultations with
  - Mid Ulster District Council staff
  - Mid Ulster Tourism Development Group representatives
  - Mid Ulster District Council Elected members
  - Mid Ulster District Council tourism and hospitality businesses
- attendance by Mid Ulster District Council Tourism staff at a workshop organised by Tourism NI to review and discuss the draft strategy.

The response by Mid Ulster District Council is outlined under the following sections:

- **2.0** Overview of Mid Ulster including Key Growth Barriers
- **3.0** Response to the Draft Tourism Strategy
- **4.0** Response Summary

## **2.0 OVERVIEW OF MID ULSTER INCLUDING PERFORMANCE AND KEY GROWTH BARRIERS**

Mid Ulster is an historic area in Northern Ireland (NI) with a strong cultural identity and geographical qualities that are ripe for further development and the advancement of the local economy but also as a significant contributor to Northern Ireland and the Island tourism product both national and internationally. The area is rich in natural and built heritage.

Mid Ulster covers 1,714 km<sup>2</sup> (14% of NI land mass) extending some 60 miles from Swatragh in the north to Fivemiletown in the south. The area represents a multicultural population of more than 150,293 across 1,714 km<sup>2</sup> (14% of the NI land mass) and is the fastest growing new Council area in Northern Ireland. The area's population is forecast to grow to 160,620 people by 2032 (+ 6.9%, 2021 - 2032). A large number of people are employed in a diverse range of sectors, including, manufacturing, services, construction, retail, agriculture, forestry, and fishing.

Mid Ulster is within a 30-minute reach of Belfast (Dublin - 2 hours) and shares a land border with Republic of Ireland providing access to 450,000 people within a 50km radius.

Mid Ulster is recognised as one of the most entrepreneurial and enterprising regions in Northern Ireland. Its economy is private sector driven, boasting the largest business base outside the Belfast Metropolitan area with 9,430 VAT registered businesses. Over the last 5 years Mid Ulster had the fastest pace of employee job creation of any council area in NI growing at 13% (6,680 new jobs) compared to a total NI growth rate of 7%.

The region has higher productivity per head of population compared to the Northern Ireland average and a GVA<sup>1</sup> of £3.97bn (producing 8.1% of NI's economic output).

### **Strategic Location**

An important characteristic of Mid Ulster is its strategic location within an hour's drive of Northern Ireland's significant tourism regions – Causeway Coast, Derry/Londonderry, Fermanagh Lakes, Belfast, and the cross-border destinations of Donegal and Monaghan. This strategic location presents opportunities to develop and promote tourism experiences within easy striking distance of these destinations and encourage more visitors to visit and stay within Mid Ulster. By widening the Mid Ulster appeal by linking to these signature tourism products for mutual advantage would help improve visitor spend and job creation and thus add to the local economies.

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<sup>1</sup> Office for National Statistics 2021



## **Performance of The Sector - Destination and Products**

Mid Ulster is not defined as a single or unified tourism “product” or destination; it has not been, to date, a discernible tourism location. It is currently an amalgam of tourism products and visitor experiences, with individual attractions and activities succeeding independently in the tourism market. However, this absence of market distinctiveness disadvantages the promotion of the area as a unique destination and its tourism products.

Key sections of the current tourism performance are largely based on specific rural and outdoor activities linked to the Sperrins landscape and across the whole Mid Ulster area. They take advantage of the area’s natural attributes and myriad environmental resources comprising a compelling mix of heritage properties, and historic and archaeological sites positioned across the district. Tourism performance is also connected to the strong retail proposition available in the market towns of Cookstown, Dungannon and Magherafelt.

Recent years has seen some dynamic tourism developments in the Mid Ulster council area. Prominent examples include, a strong events-based programme, ‘Hill of The O’Neill’ and Ranfurly House Arts and Visitor Centre, mountain biking at Davagh, and the development of the OM Dark Sky project. While these are performing relatively successfully there is potential for advancement. The complementarity of arts, culture and tourism is important as the Seamus Heaney Homeplace and Open Ground affirms. Also, the role of sport is significant as an appeal of contributors and spectators who could be encouraged as ‘cross over’ visitors to the tourism attractions.

Generally, tourism in the area is primarily dominated by day trips and people visiting friends and relatives. Mid Ulster is a developing tourist destination that in recent years has not fulfilled its ultimate potential to contribute to economic growth.

## **Key Statistics**

Most recent data for the Mid Ulster area shows a downward trend in both number of overnight trips and total estimated expenditure since 2016. The District’s most prominent challenge in relation to the tourism sector is the lack of accommodation (especially hotels) within the Dungannon and South Derry/Magherafelt areas.

In 2019, the Mid Ulster area accounted for just 3% of Northern Ireland’s total overnight trips and just 2% of associated visitor spend. Average estimated spend per night across the MUDC area in 2019 was £136, over 20% below the Northern Ireland average. While updated data reflecting the impact of more recent additions to the Mid Ulster tourism offer will likely bolster overnight trips and expenditure, scope still remains to grow these aspects of the tourism economy in future. There is no reliable data on day trips which, if available, could further increase the value of tourism to the local economy.

There is a need to increase Mid Ulster’s accommodation base as it is recognised this is needed in order to attract large groups and coach tours. The area would benefit greatly from further hotel investment especially in the Dungannon and Magherafelt areas, located close to the M1 and M2 motorways. This will have the potential to increase overnight stays, business tourism and overall tourism growth.

	Mid Ulster District Council		NI
Data Source / Indicator	#	%	
No. of Overnight Trips	146,964	3%	5,475,376
Spend on Overnight Trips	£19,994,129	2%	£1,043,996,095
No. of Visitors	1,186,696	7%	16,513,368

Tourism Statistics (NISRA) 2013-2019

Importantly, Mid Ulster has a strong track record in the delivery of a quality tourism offering which is acknowledged in the draft tourism strategy via the presence of case studies including;

- Davagh Forest in the Sperrins; home to the first internationally accredited OM Dark Sky Observatory and Visitor Centre
  - 78<sup>th</sup> dark sky park to be accredited worldwide and the only one in NI
  - the Sperrins are a defined Area of Outstanding Natural Beauty, one of only eight in Northern Ireland
  - Davagh Forest is a historic site of international significance with megalithic monuments, ancient field systems, standing stones, stone circles and burial tombs.
- Glenshane Country Farm; a rural experience that is typical of Mid Ulster
  - home to fourth generation sheep farmer, James McCloy
  - showcasing the special landscapes of the Sperrins and ensuring that traditional sheep farming practices are kept alive

### Key Growth Barriers in Mid Ulster

While the above confirms Mid Ulster's ability to achieve success, there are barriers to realising tourism growth potential, some of which are faced across Northern Ireland:

- Covid-19 and Brexit impacts
- Rising labour and material costs
- Staff recruitment and retention (particularly in the tourism and hospitality industries)
- Cost of living crisis
- Sterling devaluation
- Rising rates and rents (NI has the highest rates in OECD)
- Concerns that the ETA visa will dissuade visitors from choosing Northern Ireland
- Lack of connectivity in rural areas
- Public transport infrastructure in rural areas
- Brown signage
- Funding to support strategic tourism events

However, there are several serious barriers to tourism growth that are specific to Mid Ulster. Noting that this strategy acknowledges the rising demand to experience authentic

communities and destinations such as Mid Ulster, the Council requests that the draft Tourism strategy acknowledges and addresses barriers that are hindering development as summarised below and outlined in more detail in Section 3:

- a) **A legacy of under investment in Mid Ulster**
  - b) **An emphasis on City and Growth Deals for tourism funding that places Mid Ulster at a disadvantage**
  - c) **An accommodation deficit in Mid Ulster**
  - d) **Brown signage policy for Northern Ireland**
- a) **A legacy of under investment in Mid Ulster** has led to inadequate infrastructure and connectivity whilst it is noted past investments in Northern Ireland have been repeatedly focused on Northern Ireland's two largest cities, and the North Coast region. Council calls upon DfE/Tourism NI in their new 10-year plan, to 'level up' investment across the region to;
- address existing gaps / disparities that have prevailed for far too long across Northern Ireland (geographical inequality)
  - ensure that Mid Ulster as a rural destination can maximise its tourism growth potential
  - enable Northern Ireland to achieve its growth and sustainability targets by empowering Mid Ulster region to attract its fair share of year-round visitors.
- b) **City and Growth Deal Funding:** The Council is concerned that the draft Strategy makes repeated reference to City and Growth Deal funding as the means to deliver key Tourism Projects. It is the Council's view that financial support for tourism projects should not be predicated on City and Growth Deal funding.

Due to historic underinvestment by Government's in Mid Ulster's strategic infrastructure, the Council has been required to commit infrastructure funding in Mid Ulster towards a major roads scheme which has been in the pipeline for 40 years. As a result, Council has no additional infrastructure funding to commit to 'Tourism Projects' within Mid Ulster's Growth Deal funding allocation.

- c) **Accommodation Deficit:** The Strategy concedes that +52% of all Northern Ireland's accommodation is in Belfast and Causeway Coast and Glens alongside the need to encourage development that will a) "support a greater balance across Northern Ireland" and b) "provide the visitor with a choice of places to stay," leading to "greater regional dispersal."

Considering that Mid Ulster suffers from a serious deficit in accommodation provision, this approach is welcomed by the Council. The Council requests that the strategy recognises the:-

- specific need to develop the accommodation product in this district, in particular the need for hotel accommodation in the Dungannon and Magherafelt areas, and
- requirement to provide capital investment and grants to leverage private and public investment.



#### **d) Brown Signage Policy for Northern Ireland**

Tourism brown sign policy in Northern Ireland is implemented by the Department for Infrastructure (DFI) in partnership with Tourism Northern Ireland (TNI). The brown sign policy in Northern Ireland is based on a set of guidelines which outline the criteria for the provision of brown signs, however, there are concerns that the policy has not been reviewed since 2014 to ensure that it remains effective and sustainable, and to reflect changes in the tourism industry and visitor behaviours. The signs are an important part of the overall tourism infrastructure and are used to guide visitors to a wide range of attractions and destinations, including historic sites, natural landmarks, and cultural events.

Discussion and feedback with tourism stakeholders has highlighted concerns and negative feedback regarding the process and approval of brown tourism signs. A sample of these would include;

- Some private sector tourism organisations have indicated they are still deemed ineligible for brown tourism signs even though they are significant tourism bodies and employ a considerable amount of local people.
- The extensive length of the process and involvement of too many partners as well as the expense.
- It was noted that the eligibility criteria for a Tourism Body to be permanently open can be too onerous and excludes smaller tourism businesses.

#### **Benefits of Tourism in Mid Ulster**

As a dispersed rural location in Northern Ireland, tourism is a priority industry for Mid Ulster upon which the Council relies to generate social and economic benefits.

As previously mentioned, Mid Ulster is home to several prominent and unique tourism attractions including, Seamus Heaney HomePlace, Lough Neagh, Sperrin Mountains, Hill of The O'Neill and Ranfurly House, Clogher Valley, OM Dark Sky Park and Observatory, etc.

Glenshane Country Farm is an excellent example of how tourism can support the livelihood and wellbeing of residents in a way that;

- enables the McCloy family to remain in their homeplace
- benefits the local and wider economy
- preserves traditions for future generations
- raises pride and identity within the Mid Ulster community and across Northern Ireland

In a destination that has a rising population with multiple towns and villages that are struggling economically and socially, Mid Ulster District Council is duty bound to emphasise that the above-noted barriers must be addressed within this 10-year tourism strategy so that the success achieved by the McCloy family can be amplified across the region.

Section 3 entitled Response to the Draft Tourism Strategy explores the barriers highlighted above in more detail in addition to other salient points raised via the consultation process under the following headings:

- 3.1 Tourism investment and funding in Mid Ulster
- 3.2 Addressing accommodation deficits in Mid Ulster
- 3.3 Feedback re: the draft Vision, Mission and Strategic Aim
- 3.4 Acknowledge tourism for the key sector that it is and resource the industry adequately
- 3.5 Feedback re: the strategic themes and the addition of Measurement and Levelling Up as two new priority themes
- 3.6 Feedback re: the Embrace A Giant Spirit brand, markets and segmentation
- 3.7 Strategy format and the need for an action plan
- 3.8 Key actions required to contribute to achieving the key indicators outlined in within the Strategy

### **3.0 RESPONSE TO THE DRAFT TOURISM STRATEGY**

#### **3.1 Tourism Investment and Funding in Mid Ulster**

As noted under Section 2, Mid Ulster has suffered from a prolific lack of investment that has placed the district at a significant disadvantage by comparison with other ‘honeypot’ destinations that have benefited greatly from repeated funding initiatives, especially those in Northern Ireland’s two largest cities and the North Coast region.

To help address this, under the auspices of the Mid South West Growth Deal, Mid Ulster Council working with our partners, Fermanagh and Omagh Council and Armagh City, Banbridge and Craigavon Council, developed a new collaborative ‘Regional Economic Strategy’ (RES). The RES for the MSW region was launched by the then First Minister Arlene Foster MLA and Deputy First Minister Michelle O’Neill MLA on the 9th of September 2020 (<https://midsouthwestregion.org/res/>).

The headline ambition of the RES is to supercharge the growth of the collective MSW economy and ensure inclusive prosperity. Building a high-performing tourism economy is identified as a priority strategic pillar in this ambition.

Consumer research indicates that travellers are increasingly seeking to participate in outdoor activities, explore the landscape and engage with local communities through authentic experiences and storytelling. Mid Ulster naturally meets this need and can be a leading NI destination in this regard. In addition, Mid Ulster has developed a Strategic Outline Case (SOC) for ambitious tourism projects including;

- **Slieve Gallion/Gateway to the Sperrins Experience:** with a proposal to embed a hero attraction in the Sperrins, Ireland’s largest mountain range in an untapped Area of Outstanding Natural Beauty

- **Hill of The O’Neill – Visitor & Multi-Media Hub of Excellence:** encompassing a new multi-media arts, heritage and learning complex with improved events facilities to advance participation, education and visitor experience and to preserve the O’Neill story (Ireland’s last chieftain).

While Mid Ulster’s ambition for tourism is undeniable, this has been curbed by a persistent absence of investment. In the current climate in a post COVID-19 and Brexit recovery context this is being further exacerbated as the Council must strike a balance between immediate challenges and the need for longer-term transformative action to build economic strength that can withstand any future economic shocks.

As a dispersed rural location, investment in road connectivity infrastructure has thereby been identified as an immediate priority. The need for same has been emphasised via consultations with professional travel buyers who have stressed the requisite for fit for purpose infrastructure (respectful of the natural environment) that can comfortably and safely access indigenous assets by day and by night.

As this investment in infrastructure relies upon the MSW Growth Deal, it means that there is no opportunity to address Tourism Projects within Mid Ulster’s Growth Deal Portfolio. Accordingly, Mid Ulster District Council is concerned that the current draft Tourism Strategy references the reliance on City and Growth Deals for tourism funding. The Council strongly advocates that DfE/Tourism NI must not rely on City/Growth Deal funding being the sole source of capital funding to support tourism projects over the next 10 years. Doing so, places areas like Mid Ulster at an even greater disadvantage than its current position. We implore DfE/Tourism NI to ensure that funding support is provided to those regions like Mid Ulster where there has been an historic lack of tourism investment, and if targeted funding is provided to such regions, it will create an opportunity to develop a number of exciting seismic tourism projects to ‘level-up’ the region and thus provide a more balanced tourism offering across NI as a whole.

As a priority, to achieve the Strategy’s stated ambition to benefit “all parts of Northern Ireland” the revised Strategy should call out the need to;

- address historic investment deficits (including tourism) in Mid Ulster in the interest of fairness and equality so that the district can realise its full tourism potential and thus maximise social and economic benefits.
- research and secure alternative funding streams (eg, via DfE, TNI etc) so that a soul focus on the City and Growth Deal (that will not benefit Mid Ulster in terms of tourism) is removed

### **3.2 Addressing Accommodation Deficits in Mid Ulster**

In addition to feedback regarding the need for robust infrastructure, professional travel buyers have emphasised the need for Mid Ulster to acquire quality accommodation to attract high spend visitors and increase dwell time in the destination. Currently, there is only one 4 star hotel (99 rooms), seven 3-star hotels (349 rooms) and one 2-star hotel (103 rooms). Hotels comprise just 39% of available rooms stock with the balance spread across guesthouses, B&Bs and self-catering.



Over the last decade, it has been repeatedly noted that Mid Ulster has the second lowest number of hotel rooms of all local district council areas (see <https://www.tourismni.com/globalassets/industry-insights/local-gov-district-tourism-statistics/lgd-2018/lgd-all-fact-cards-2018.pdf>). This places Mid Ulster at a significant disadvantage by comparison with destinations like Belfast and Causeway Coast and Glens where +52% of all Northern Ireland's accommodation is located.

Not only does this lack of accommodation prohibit Mid Ulster from achieving increased dwell time that maximises economic opportunities via leisure tourism (i.e., holiday markers), but it also hinders the opportunity for the region to win business tourism opportunities (e.g., corporate meetings and conferences) even though there are indoor and outdoor venues that can cater for a high number of delegates including

- Ballyronan Marina: 8,500 delegates
- Hill of The O'Neill and Ranfurly House: 600 delegates
- Meadowbank Sports Arena: +800 delegates

The absence of accommodation means that Mid Ulster is already at high risk of having a reputation for being a “drive through” rather than a “stay over” destination.

The development of accommodation in Mid Ulster is essential for a successful thriving tourism economy and thus the Council requests that the revised strategy identifies the need to:

- develop and invest in accommodation in Mid Ulster to include hotel accommodation in Dungannon and Magherafelt areas
- conduct due diligence with in-depth research to define sustainable accommodation solutions that can fulfil the needs of the region
- identify capital investment and grant frameworks that can successfully win private/public investment

### **3.3 Feedback on the draft Vision, Mission and Strategic Aim**

While the consultation process has confirmed general agreement with the Mission, there have been a) requests for adjustments to the Vision and b) the Strategic Aim has been challenged.

**Vision:** Mid Ulster welcomes the focus on establishing Northern Ireland as a **year-round** destination. This approach is vital for sustaining livelihoods and the local economy, particularly in this region where rural communities in remote locations are prevalent.

The reference to heritage and culture is misleading as it does not express the full breadth of Mid Ulster's / Northern Ireland's offering where, for example, experiences in the great outdoors are key. Noting that this vision will be a guiding light for industry and key stakeholders and that thereby one theme cannot be noted to the exclusion of others, it is strongly recommended that all of the themes that can drive visitation should be referenced including

- culture and heritage
- activities and adventure

- food and drink
- wellness
- events and festivals

While the vision references landscape, it omits to reference water / seascapes. Referencing the full breadth of natural assets is essential for raising the profile of what Northern Ireland has to offer and motivating longer visitation. As Mid Ulster is home to the renowned Lough Neagh that is Britain's largest lake and deeply connected with Ireland's history and mythology, it is recommended that the revised strategy is expanded to elevate the importance of other natural assets including water.

There is a need for funding to develop or grow existing strategic tourism events / festivals identified by Councils in their tourism plans. We are aware of the International Events Fund, however, this is extremely difficult to attain this funding due to the criteria and Mid Ulster's rural location. Historically large funding has been targeted towards NI's two largest cities and the North Coast.

**Strategic Aim:** This aim expresses the ambition to increase the value of tourism to Northern Ireland's economy by 50-75% versus 2019. The Consultation Questionnaire requests feedback on the quantitative aspect of this aim that "balances ambition, realism and sustainability."

The consensus in Mid Ulster is that it is not possible to formulate an opinion on whether these growth targets are realistic and robust when;

- a) there is no explanation of the rationale underpinning these targets and;
- b) there is no action plan detailing how these targets can be achieved.

Importantly, noting that the cost of travel and tourism has increased significantly since 2019, the 10-year draft strategy provides no insight into the proportion of growth attributable to inflation versus profit.

In addition, the growth targets span a 25% differential between 50% and 75%. It is not clear where the higher versus the lower end of the growth targets are expected to land.

There are concerns in Mid Ulster that unless the low availability of accommodation, the lack of investment to date and viable funding opportunities are addressed as urgency that this region will not realise its full growth potential.

The growth target is a priority element in the strategy. Over the next 10 years this target will be a fundamental anchor, relied upon by Mid Ulster District Council in multiple ways including to inform the region's tourism development plans and provide guidance to local businesses.

While the Council welcomes the ambition expressed within the face value of these targets, it is requested that the revised strategy

- explains the rationale that underpins the growth targets
- includes an action plan that details how and when these targets can be achieved
- provides detail into the proportion of growth attributable to inflation versus profit

- provides an insight into where the diverse growth brands (from 50% to 75%) will be attributed including for Mid Ulster and for diverse kinds of tourism businesses (e.g., accommodation providers, visitor attractions, experience providers)
- provides details into the funding initiatives that will assist the levelling up process and enable Mid Ulster to maximise its growth potential for the benefit of the local economy and wider Northern Ireland economy

### **3.4 Acknowledge tourism for the key sector that it is and resource the industry adequately**

Noting that the strategy acknowledges the value of tourism in Northern Ireland as a “huge success story,” contributing +£1 billion of expenditure to the local economy and accounting for one in every 12 jobs, to achieve the ambition expressed in the draft strategy Mid Ulster calls for tourism to be recognised for the key sector that it is aligned with an appropriate budget to achieve growth and support regional economies.

The reality is that tourism in Northern Ireland and particularly in Mid Ulster (due to a consistent historic lack of investment) needs adequate resourcing to encompass a wide menu of national and regional needs such as investment in market research, communications, training and development, data collation systems, tourism product development (e.g., experiences, events and festivals etc), accommodation development, quality standards, sustainability/regeneration policy, supports and experience development.

The Council thereby requests that the revised strategy:

- details a commitment to provide adequate resources (human and financial) at a national and regional level
- clarifies the availability of funds and how these can be accessed by regions such as Mid Ulster to achieve progress and level-up to address historic gaps in investment
- confirms a process for multi-year budgets that allow for forward planning, noting that the existing structure of in-year budgets is not fit for purpose and makes it challenging for NI to compete against other destinations
- outlines a national and bespoke regional action plan (that can meet the specific needs of Mid Ulster) over short, medium and long terms supported by appropriate resources and funding
- consults with key stakeholders at a national and regional level to ensure that this action plan is targeted with SMART objectives that can achieve clear progress over a defined timeline (e.g., short term: 2024-2026, medium term: 2027-2030 and long terms +2031) to comprehensively address the menu of needs noted above from market research, communications, training and development to data collation systems, quality standards, product and policy development
- clarifies processes for accessing funds with clearly stated and reasonable timelines for decision making

### **3.5 Feedback re: strategic themes and the addition of Measurement and Levelling-up as Priority Themes**

The draft Tourism Strategy Questionnaire requested feedback on the five themes outlined in the strategy and to what extent these are the realistic targets for future growth. While there is broad agreement that in their essence the five key themes noted are relevant for the strategy, the following points have been raised:



1. Greater clarity is required regarding the definition, purpose, relevancy and outcomes that can be realised via the proposed five themes.
2. MEASUREMENTS must be added as a priority to the existing proposed five themes (as detailed below).
3. LEVELLING UP must be added as a priority to the existing proposed five themes (as detailed below).

**Existing five themes (Innovative, Inclusive, Sustainable, Attractive, Collaborative):**

In relation to the existing five themes Mid Ulster advises as follows:

- Greater clarity is required with a full explanation of each key theme and a comprehensive list of qualitative and quantitative outcomes for how each theme will manifest. For example
  - the term INCLUSIVE can encompass cross collaboration at local, regional and national level and accessibility (i.e., the provision of communications and services for people with diverse needs)
  - the term ATTRACTIVE can encompass raising the profile of Northern Ireland as a compelling destination that in turn can win the attention of investors from tourism and non-tourism industries
  - the term COLLABORATIVE can manifest in many diverse ways. The strategy needs to reference a recommended collaborative structure with set standards.

In addition, the revised strategy must;

- position these themes within their current context to establish a baseline so that progress can be assessed over the Strategy's 10-year period.
- include the provision for national and bespoke regional SMART plans developed in collaboration with industry and the Council (ensuring that Mid Ulster's specific circumstances are addressed) so that instead of being abstract, the themes are vehicles for progress

**MEASUREMENT: data collation and analysis:** While there is reference to the use of "real time quantitative analytics and insights" to monitor performance under the term INNOVATIVE, it is strongly advised that the term MEASUREMENT needs to be added as its own separate theme.

The success of this plan needs to be visible and robust data analytics are required to confirm progress and achievement of the growth targets. Otherwise, the strategy is simply aspirational. A process for robust data collation and analysis with a culture of measurement embedded at regional and national level is essential so that

- progress can be independently assessed in a way that is visible and measurable
- strengths, weaknesses and challenges can be swiftly identified and addressed

As a priority, MEASUREMENT must be added as a sixth theme. Along with a clear explanation of what this theme encompasses, the expected outcomes must also reference how effective data collation and analysis is essential for

- empowering businesses and regions to measure progress

- strengthening the position of businesses and regions like Mid Ulster to secure investment and grant funding

**LEVELLING-UP – Levelling Up** should be included as an additional Thematic Area (No. 7) within the draft Tourism Strategy for NI. Council strongly believes DfE/TNI must prioritise support for regions like Mid Ulster where there has been an historic lack of tourism investment in the last 10 years and where there will not be capital funding available through the Growth/City Deal funding in the next 10 years. This ties in with the ambitions outlined in the UK government’s Levelling Up agenda to address geographical inequality. It is also important to provide a clear explanation of what this theme encompasses, the expected outcomes must also state how the draft Tourism Strategy will eliminate historic funding gaps in the Mid Ulster area and highlight other funding opportunities to support capital and revenue projects.

In summary, Mid Ulster District Council requests that the revised Tourism strategy:

- provides greater clarity regarding the definition, purpose, relevancy and outcomes that can be realised via the five themes proposed in the draft strategy
- includes SMART Action plans so that visible progress can be achieved via the themes with a bespoke plan to meet the specific needs of Mid Ulster
- itemises MEASUREMENT as an additional Priority Theme
- details the baseline for each theme so that the current status can be benchmarked against future progress over the lifetime of the 10-year plan
- works with local government and the national tourism bodies to agree
  - what should be measured (e.g., jobs, revenue generation, visitors numbers according to their place of origin, environmental and social benchmarks)
  - what mechanisms should be used for measurement, noting that while NISRA data should be included this cannot be solely relied upon as there are gaps in the information provided and the data is not consistently available when the industry most requires it
  - how data can be effectively collated and aggregated (ensuring that only necessary data is collated and that processes are easy for all to administrate)
  - how information should be shared to measure performance, provide benchmarking and support strategic development
- includes LEVELLING-UP as a Priority Theme to address geographic inequality to support for regions like Mid Ulster where there has been an historic lack of tourism investment in the last 10 years and where there will not be capital funding available through the Growth/City Deal funding in the next 10 years. This will serve to create a more balanced tourism offering across the whole of Northern Ireland.

### **3.6 Feedback re the Embrace A Giant Spirit brand, markets and segmentation**

Via the consultation process, the following points have been raised

- the Embrace A Giant Spirit experience brand is demoted within the strategy and its alignment with the 5 noted strategic themes is unclear
- to achieve success, tourism destinations must be clear on the markets and customer segments that are a match for its offering

- while the draft strategy identifies first priority markets (Northern Ireland, Republic of Ireland, Great Britain, North America) and second priority markets (France and Germany) it makes no reference to the customer segments that have been identified via the national tourism bodies as key targets

**Embrace A Giant Spirit experience brand:** A low level of reference is made within the strategy to the Embrace A Giant Spirit destination experience brand launched in 2019 that distinguishes Northern Ireland in the domestic and global marketplace by comparison with other global and Ireland brands including Wild Atlantic Way, Ireland’s Hidden Heartlands, Ireland’s Ancient East and Dublin Surprising by Nature.

Additionally, this brand incorporates key values including a big-hearted, pioneering, legendary and elemental spirit. The purpose of this brand needs to be clearly stated in the revised strategy and how the brand aligns with the strategic themes needs to be clarified.

**Segmentation:** at a regional level, Mid Ulster relies upon the segmentation defined by the national tourism bodies to identify the customers from the domestic and global marketplace that are a match for this region’s offering. No reference is made within the draft strategy to this segmentation or its purpose.

The Council thereby requests that the revised strategy:

- emphasises the importance and function of the Embrace A Giant Spirit destination experience brand
- clarifies the positioning of this brand and how it aligns with the draft strategy’s key themes
- references the need for support to provide effective guidance regarding the purpose and function of tourism communications across brands and themes
- in addition to the target markets, makes reference to the customer segments that are a key target for Northern Ireland (noting that a summary of the current segments per marketplace can be recorded in the appendices for future records)
- includes an action plan detailing how opportunities can be maximised at a national and regional level via a targeted and strategic methodology
- references how first and second priority markets can access Northern Ireland and Mid Ulster
  - in the current climate: i.e., via flight, ferry, public transport road, bike etc.
  - in the future: via plans to improve access for domestic and global visitors
  - via sustainable travel solutions for example, a connected infrastructure that supports movement via public transport, biking etc; a robust infrastructure that facilitates safe travel via roads and supports the use of carbon-free transport; encouraging longer stays and increased dwell time in Northern Ireland

### **3.7 Strategy format and the need for an Action Plan**

An effective strategy involves setting goals and priorities, determining actions to achieve goals and mobilising resources that can execute the actions and achieve identified targets. While Mid Ulster welcomes that this strategy acknowledges the importance of tourism as a vital Northern Ireland industry, it is our view that the draft entitled *Tourism Strategy for Northern Ireland 10 Year Plan* reads as a policy document rather than a strategic plan.



While this draft cites growth targets, it gives no guidance or narrative for how these can be achieved. The existing strategy is devoid of a roadmap and (vitaly) a SMART action plan that can ensure Northern Ireland achieves measurable success over the next 10 years. Neither does the strategy address the unique circumstances of Mid Ulster (which is not referenced once in strategic terms) as a region that has been inadequately resourced over time and now requires special attention and a bespoke action plan to address our unique needs to maximise social and economic benefits.

In a post pandemic and Brexit climate, this strategy is essential for supporting the recovery of the tourism industry and capitalising upon the ever growing demand to explore Northern Ireland that tourism stakeholders have fought to establish with unwavering resilience throughout the Troubles over many decades.

In its current format, the strategy falls short and reads as aspirational. Without a “how to,” it lacks the clear direction and clarity required to achieve real success. Parts of the strategy read more like a marketing brochure. For example, 15 case studies (20% of the report) with no stated purpose or connection to the wider strategy have been included. While Mid Ulster welcomes that Glenshane Country Farm and OM Dark Sky Park have been referenced as quality tourism assets, in their current format these studies are best placed in the appendices. Additionally, inaccuracies in the text need to be corrected; OM is the 78<sup>th</sup> dark sky park to be accredited worldwide (the only one in NI) and it is also not possible to stay in the Observatory but nearby at Sperrinview Glamping.

Noting the crucial importance of this strategy at this pivotal point in the positioning of Northern Ireland as a leading tourism destination, the Council calls for the following:

- further engagement with the Council, tourism industry and key stakeholders to ensure that the strategy is appropriately informed and devoid of inaccuracies
- ensuring that the final version reads as a credible strategy that achieves buy-in and success over a 10-year period, rather than as a policy or marketing document
- ensuring that the strategy details a robust situational analysis outlining the current environment including national and specific regional challenges (along with any identified insights and solutions for same) that can act as an accurate benchmark for the future as this strategy advances over a 10-year period:

Northern Ireland-wide challenges	Mid Ulster-specific challenges
<ul style="list-style-type: none"> <li>• Covid-19 and Brexit impacts</li> <li>• Rising labour and material costs</li> <li>• Staff recruitment and retention</li> <li>• Cost of living crisis</li> <li>• Sterling devaluation</li> <li>• Rising rates and rents (NI has the highest rates in OECD)</li> <li>• Concerns that the ETA visa will dissuade visitors from choosing Northern Ireland</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of funding to develop the tourism product in comparison with other preferred areas</li> <li>• The urgent requirement to level-up rural areas such as Mid Ulster through targeted investment</li> <li>• An absence of viable investment and funding options to support tourism projects</li> <li>• Need for hotel accommodation in Dungannon and Magherafelt.</li> <li>• Deficits in rural infrastructure and connectivity</li> </ul>

- ensure that the strategy includes a clear narrative and roadmap for achieving success aligned with a SMART Action plan with clear objectives to be addressed over short, medium and long terms to achieve the progress that will benefit Northern Ireland

### **3.8 Key actions required to contribute to achieving the key indicators outlined in within the Strategy (maximum of 7 selected)**

- Develop and deliver a bespoke Skills Action Plan
- Develop a Quality Employer Charter
- Develop a Tourism Employer Excellence Programme
- Build awareness in businesses of sustainability (green) practices
- Encourage and develop NI cross government collaboration
- Build awareness of, and support for, accessing sources of alternative funding
- Build awareness in businesses of innovation within the tourism sector
- Formally recognize/accredit businesses for demonstrating innovation
- Additional Data Collection and Robust Benchmarking
- Marketing Campaigns – Regional messaging across international campaigns
- Develop a NI Events Framework
- Support local events and festivals
- Support larger events that attract people from outside of NI
- Promote importance of Business Tourism and deliver on Business Tourism Strategy
- Deliver an annual tourism awards programme to recognise best practice in the industry
- Develop an air route development programme to improve connectivity with France and Germany
- Increased delivery of Travel & Tourism programmes in schools leading to increased qualifications
- Stronger connection between employers/delivery partners/programmes to support businesses to participate in opportunities
- Develop a bespoke Sustainability Accreditation Scheme and/or promote a framework to promote and recognize other quality assured sustainability accreditation schemes
- A Regenerative/Sustainable Tourism Development Programme similar to the EDP to support the development of new and enhanced sustainable tourism experiences;
- Promote the role tourism plays in sustaining other sectors, eg culture, arts & heritage and food
- Encourage and facilitate collaboration within the sector to share best practice/knowledge/networks
- More collaboration between councils to produce integrated tourism/destination plans at local level

#### **4.0 RESPONSE SUMMARY**

While Mid Ulster welcomes the value placed on tourism along with the aspirations outlined in the draft, our response calls for a revised Tourism strategy that reflects and addresses national needs and the specific local needs of Mid Ulster. This strategy emerges at a critical point in Northern Ireland's evolution as a tourism destination where there is now ever-growing demand from the domestic and global marketplace, thereby a robust strategy that can leverage this opportunity by delivering visible and measurable success over the next ten years and beyond is essential.

As a priority, the strategy must include informed growth targets that provide clear benchmarks at a national, regional, industry and business level. It must also include a comprehensive situational analysis based on the current climate and (crucially) a SMART Action plan detailing how stated ambitions and growth targets can be achieved and measured.

Rather than a "one size fits all" approach, the plan should reference the unique requirements of Mid Ulster and the bespoke solutions that can address these. Importantly, prior to revising the strategy further consultation with the Council and other key local stakeholders is necessary to ensure the final strategy provides the narrative, roadmap and action plan that can maximise social and economic opportunities that will assist with delivering the Government's levelling-up agenda within the context of a sustainable and regenerative tourism framework.

The Council is committed to seeking investment in large scale tourism projects to grow the district's tourism economy and is keen to work with central government to ensure that this goal is achieved.

*Councillor Dominic Molloy  
Chairman  
Mid Ulster District Council*