



Department for the
Economy
www.economy-ni.gov.uk

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.¹

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.

¹ 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.

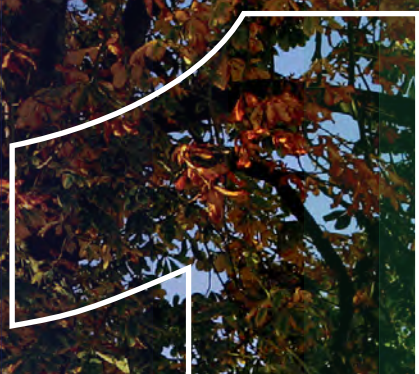
It is designed to be a roadmap, premised on five themes, which seeks to strive for a new and ambitious growth trajectory that is **Innovative, Inclusive, Sustainable, Attractive** and **Collaborative** over the next decade. These five themes form the core of the Strategy and are designed to support continued 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.



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)². 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'.

2 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'³; 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' Report⁴, 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.

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

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

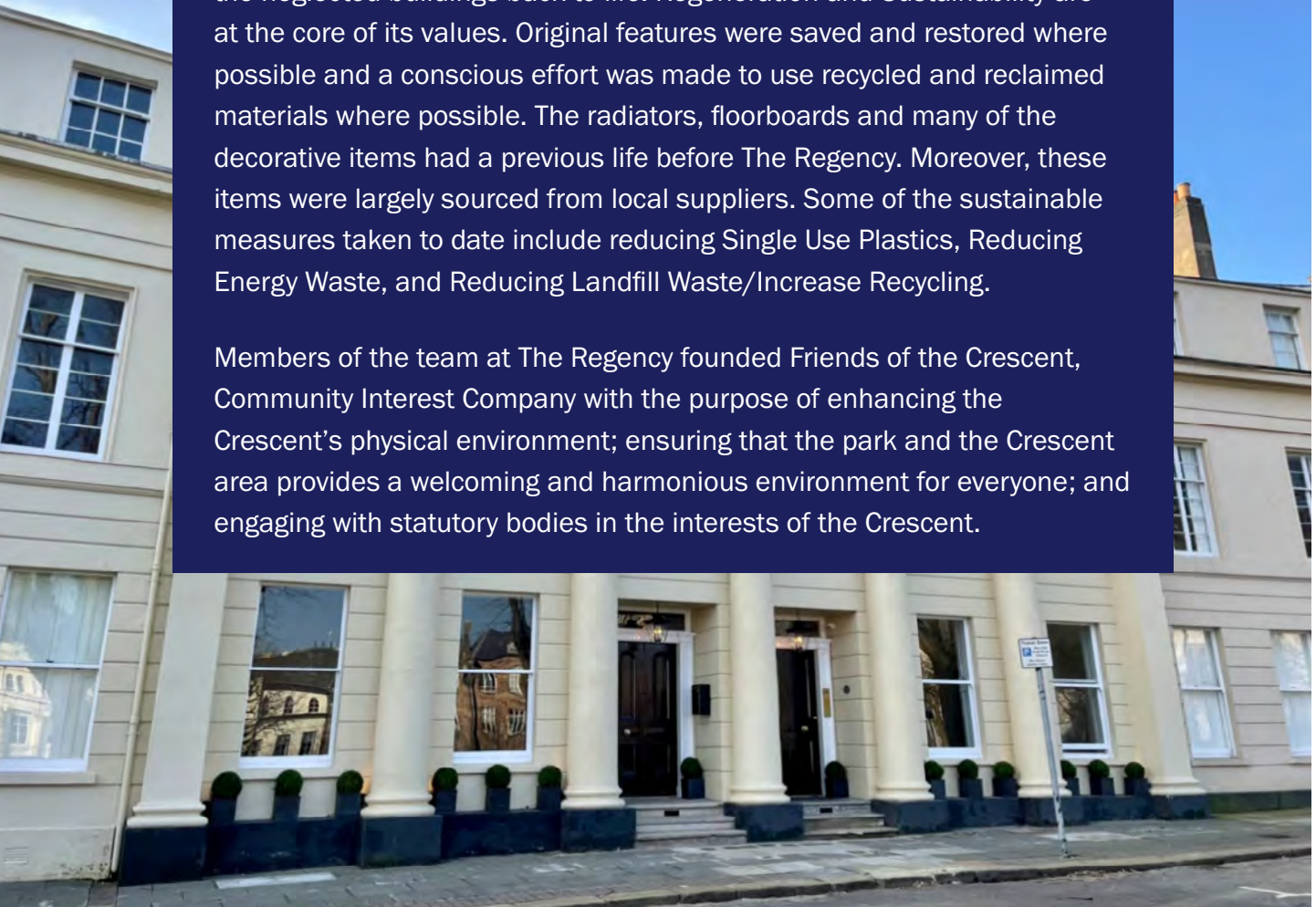
CASE STUDY

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.



The background is a photograph of a rocky coastline at sunset. The sky is filled with clouds, and the sun is low on the horizon, creating a warm orange and yellow glow. The water is calm, reflecting the sky. In the foreground, there are large, dark, jagged rocks. A large, white, stylized outline of the number '2' is superimposed over the image. The text 'THE POLICY CONTEXT' is written in a bold, green, sans-serif font inside a white rectangular box that is part of the number '2'.

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.



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|---|--|
| 1. People. Planet. Prosperity. | 10. DfC Cultural Heritage Tourism Strategy |
| 2. Draft PfG 2021-2026 | 11. DAERA NI Marine Plan |
| 3. NDNA | 12. DAERA NI BioDiversity draft Strategy |
| 4. NI Industrial Strategy | 13. NIE Green Growth Strategy |
| 5. DfE '10x Economy' Economic Vision | 14. DAERA Rural Policy Framework |
| 6. DfE Circular Economy Policy | 15. DfE Skills Strategy |
| 7. DfE NI Energy Strategy 'The Path to Net Zero Energy' | 16. DfE 14-19 strategy |
| 8. TNI Unlocking the Outdoors draft Strategy | 17. NI City and Growth Deals |
| 9. NI Business Events Integrated Strategy | 18. Climate Change Agenda - The Climate Change Act (Northern Ireland) 2022 |



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 2019⁵.

⁵ 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.⁶**

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.

⁶ World Tourism Day 2022: Sector United Around "Rethinking Tourism" for People and Planet (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.

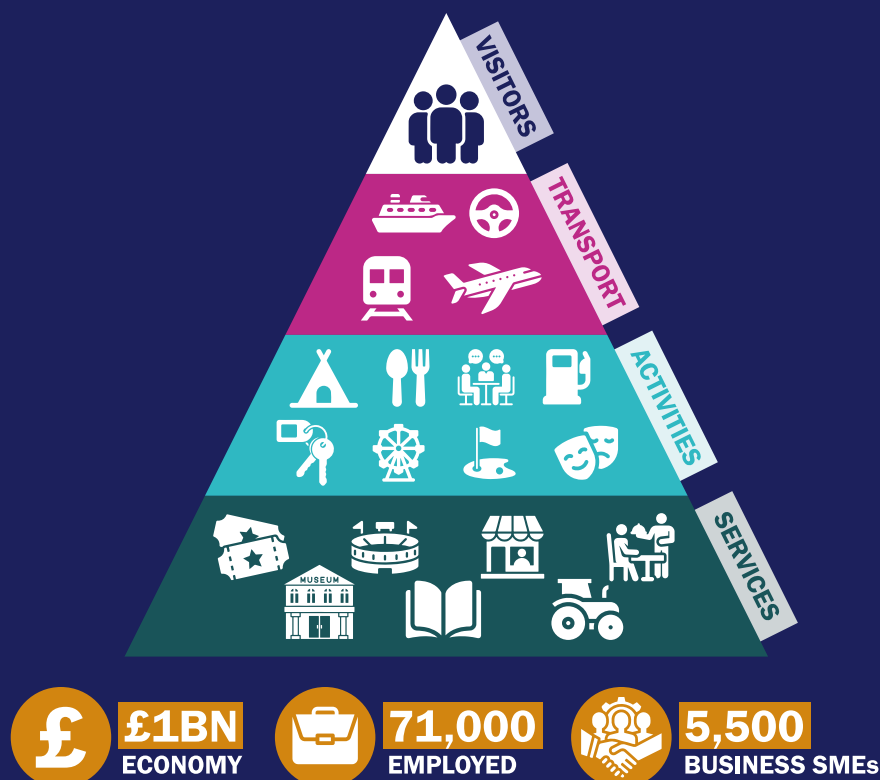
Northern Ireland tourism remains one of the largest, locally owned, internationally traded sectors of our local economy, directly impacting the economy by generating demand for tourist services such as accommodation, recreational and cultural activities and transport services. As visitor numbers and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

TOURISM STRATEGY FOR NORTHERN IRELAND

10 YEAR PLAN

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 earnings⁷. 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.

⁷ [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.

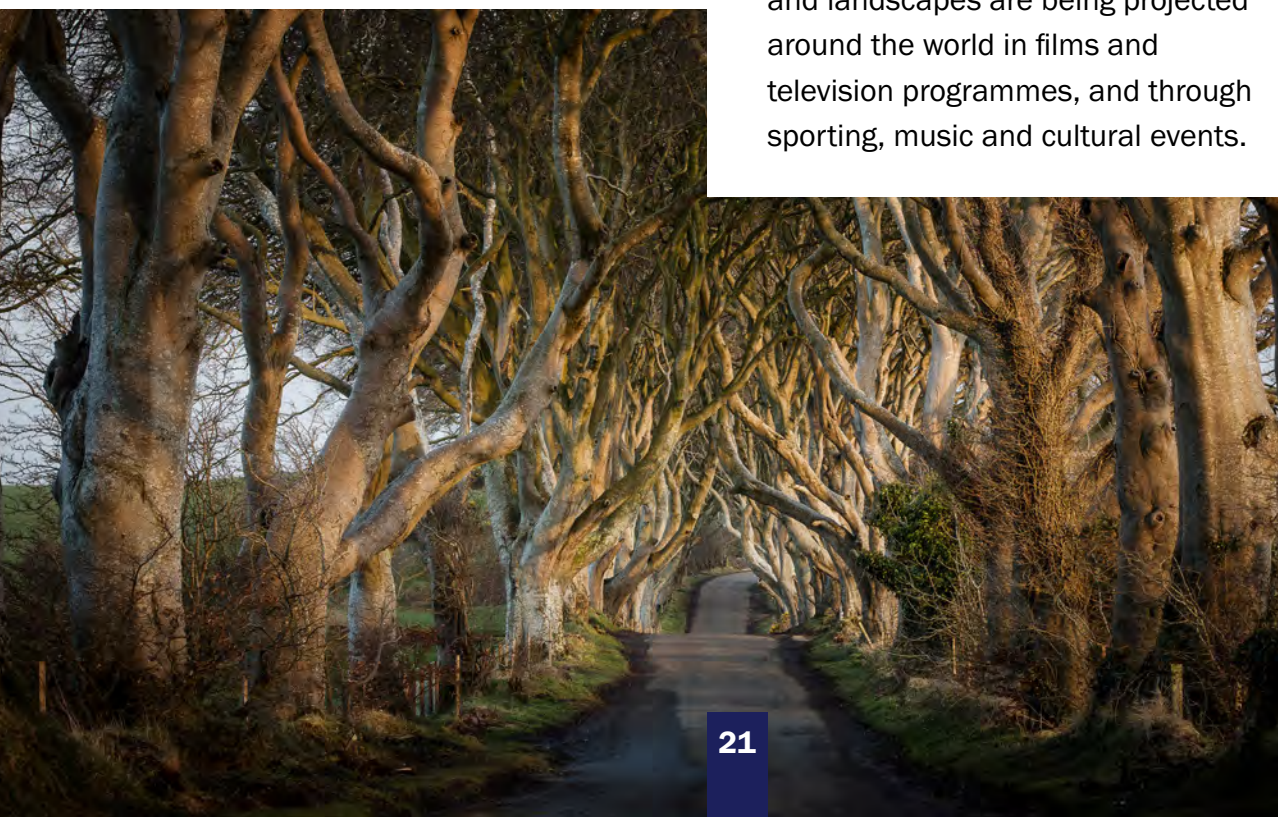
In 2023 there has been a strong post covid recovery and its anticipated visitor numbers will reach 90% of 2019 levels (GB 91%, Other Overseas 87%).

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

Roll over each year to reveal milestones

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.



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



Warm Welcomes

Visitors like to feel **welcome, comfortable and safe**, from the Northern Irish hello to supporting infrastructure that provides a sense of place and accessibility for all.



Innovative Stories & Attractions

Visitors like **stories** and attractions that connect them with the place, people and culture: from creative and **innovative attractions** to tours that showcase the real Northern Ireland and its people.



Landscape & Nature

Visitors like to immerse themselves in the **landscape and nature**: From multi-sensory experiences to heightened connection and emotional engagement with the landscape, particularly the coast.



Active Outdoors

Visitors like being **active in the outdoors** or **exploring the countryside**; from the freedom of the outdoors whether through land or water-based activities to immersive attractions.



Heritage & Tradition

Visitors like to immerse themselves in the **past, heritage & traditions** of the place; from the authentic and iconic historical sites to re-imagined modern ways of showcasing them.



Cultural Venues & Landmarks

Visitors like connected places of interest, providing a range of things to see and do; from **cultural venues to landmark touch points**.



Animated & Connected Places

Visitors like **distinctive towns and cities**; from exploring attractions, architecture and city walking trails to seeking an **animated place** across day and night.

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.⁸

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.

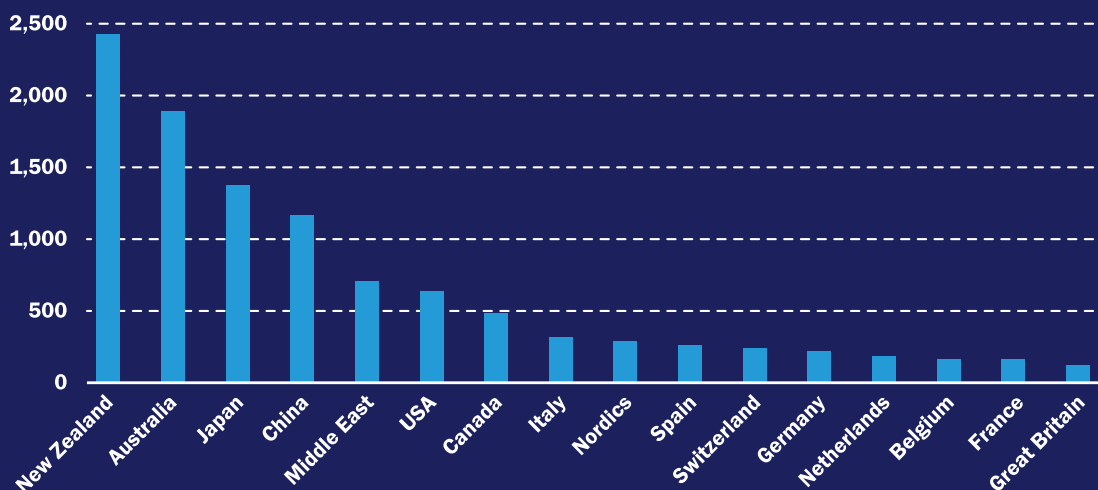
The four markets of primary focus will be the NI domestic market, Great Britain, the Republic of Ireland and North America. Official statistics show that in 2019 there were 5.33 million overnight visitors in NI, staying for a total of 16.6m nights and spending £1.04 billion.

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 CO₂e



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.

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:

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

- 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.

The background image shows a dramatic coastal scene. In the foreground, a suspension bridge with a metal mesh deck spans a deep, rocky gorge. The bridge is supported by cables and runs diagonally from the bottom left towards the upper right. The gorge walls are steep and covered in patches of green vegetation. In the background, a large, craggy rock formation rises from the sea. The top of the formation is covered in lush green grass. The sky is a clear, bright blue. The overall image has a blue-tinted overlay, particularly on the left side where the sea is visible.

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:

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).



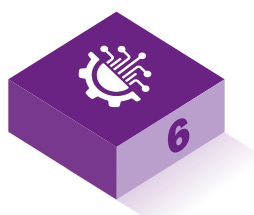
Sustainable Market Connectivity:

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.



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.



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%.



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.

An aerial photograph of a coastal town and a large stone fortification. The town is built on a hillside overlooking the sea, with numerous houses and buildings. The fortification is a large, multi-towered stone structure situated on a rocky outcrop in the water. Two white circles are drawn on the image: one around a tower in the town and another around a section of the fortification's wall. The image has a vertical color gradient from blue on the left to red on the right.

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 Framework⁹ 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](#)



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%¹⁰ 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 entrepreneurship 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.

¹⁰ 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 Quality¹¹ 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](https://www.nisra.gov.uk/work-quality-in-northern-ireland-july-2021-to-june-2022) | Northern Ireland Statistics and Research Agency (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)¹² 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.

¹² <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 2020¹³.

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?
Tourism Growth is: INNOVATIVE and uses our creative skills INCLUSIVE bringing opportunities for all SUSTAINABLE for generations ATTRACTIVE to visitors and investors COLLABORATIVE to deliver a shared 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.	- 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. - 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. - 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. - 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. - Collaborate widely in a spirit of true partnership. We nurture a shared vision and common clarity of purpose.	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 entrepreneurship 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. Contributing to a more inclusive economy: - Improve the Work Quality14 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. 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. 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.	Innovative - Tourism workforce has the right digital skills to ensure that they meet consumers' evolving needs. - Use real time quantitative analytics and insights to develop, market and monitor performance of our tourism offer. - 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. Inclusive - More sectors of the economy across the whole of Northern Ireland will benefit from tourism. - Tourism investment 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. Sustainable - 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. Attractive - 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. (for example in culture, social, escape, sport, business and screen) - We will be responsive to changing trends in customers' needs. Collaborative - 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.
PURPOSE 	OUR STRATEGIC AIM To increase the value of tourism to the Northern Ireland economy by 50-75% compared to 2019.			



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 Quality¹⁵ 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/work-quality-in-northern-ireland-july-2021-to-june-2022)

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.