



Response to Department for the Economy Consultation Draft Tourism Strategy for Northern Ireland – 10 Year Plan

The NI Tourism Alliance (NITA) was launched in August 2018 and with members across all sectors of the tourism economy, provides an independent voice for the tourism economy in Northern Ireland. Our role is to represent our members, ensuring the voice of industry is listened to in order to shape the future growth of tourism. We represent NITA members' interests to government and policymakers at all levels and jurisdictions to raise awareness of and contribute to the solution of major strategic issues affecting the industry.

NITA welcomes the publication of the draft Tourism Strategy and the opportunity to contribute and inform the final version of the strategy.

The draft tourism strategy recognises the importance of Tourism to the growth of a strong regional economy, supporting communities and the important contribution that it makes to achieving the goals of the 10X Economic vision. The 10 year plan sets out a direction of travel for tourism and has addressed some of the key areas for focus and the barriers to growth.

As the industry continues to recover from the effects of the pandemic and the challenging economic environment, the strategy is critical to ensure that we are able to maximise opportunities, address the challenges facing the industry and deliver sustainable social and economic benefits.

In our response below we have answered the specific questions asked by the Department.

Q2 – Vision, Mission, Aim

We agree with the proposed Vision, Mission and Aim in principal however, further work is required on the Vision and Aim to create a more compelling, ambitious and inspiring strategy for the next 10 years.

Vision

This needs to be more inspiring and ambitious with positive language. The vision should engage and inspire confidence in the industry, policy and decision makers and the public. People are at the heart of Tourism and this should be reflected in the vision.

For example –

'Northern Ireland will be recognised globally as the ultimate year-round destination, celebrated for its authentic experiences, breathtaking landscapes, rich heritage, vibrant culture and the passion of our people. Fuelling communities, boosting the economy, and championing sustainability.'

Aim

Aim - more clarity is required on the definition of the 'value of tourism' and how this will be measured. Currently, the value of tourism is measured primarily in terms of visitor spend from overnight stays, which in 2019 was £1bn. The NITA report 'Valuing the Tourism Industry in NI', ([Valuing the Tourism Industry in Northern Ireland | Northern Ireland Tourism Alliance](#))

nitourismalliance.com), published in September 2023, showed tourism was worth £3bn to NI economy in 2019 and £2.3bn in 2021 based on jobs supported, direct and indirect contribution.

Value will need to be measured in a number of ways, as only measuring visitor spend from overnight trips will not provide the true value of tourism.

Targets drive behaviour and it is important the aim drives actions to grow tourism in a sustainable way. The strategy recognises the need to focus on value over volume, better distribution over the year (increase shoulder season), regional spread and supporting growth of other sectors etc and this needs to be reflected in the overall aim. Some suggestions include:-

- How tourism supports other sectors (38% spend on food & drink, 27% Retail)
 - Tourism provides growth to domestic sectors such as hospitality
- Increased spend per visitor (value over volume)
- Better dispersal across year of visitors – increase shoulder season business
- Share of international visitors to Island of Ireland – this would be a target for Tourism Ireland.
 - The strategy states that tourism overnight revenue growth in ROI between 2012 and 2019 was 69% compared to 52% in NI.
- Social Impact on communities and environment
- Tourism Ireland are forecasting 6.5% growth in NI tourism year on year until 2030 – spend from international visitors – what is the TNI forecast for domestic and ROI?

Question 3 – Themes

Overall, the themes cover the areas of importance to provide a sustainable growth trajectory for the industry. Below are our comments on the current themes and our recommendations.

Connectivity and Access

For Tourism to be successful we need to ensure that visitors are able to get to Northern Ireland and travel around the region once here. Therefore, we believe that Connectivity and Access must be included as a theme in its own merit.

- Aviation - we were pleased to see that the Department have commissioned York Aviation to undertake research to inform future policy making with regards to NI air connectivity. We have contributed to this and it is important that the outcomes of this research are incorporated into the tourism strategy. We have seen an increase in the short haul routes in the last couple of years, both GB and Mainland Europe, however there is the potential to further develop these routes to provide direct access to Northern Ireland. It is also important to look at long haul destinations, especially with the restrictions on passenger numbers at Dublin Airport and the impact of the introduction of the Electronic Travel Authorisation on those visitors crossing the land border into Northern Ireland. We have an opportunity, and need, to explore additional direct access routes from long haul destinations and other hub airports.
- Cruise - Cruise (which is not mentioned in the document) has bounced back since the pandemic and in December Belfast Harbour was named the Best UK & Ireland Port of Call in the Cruise Critic Awards. Significant investment has been made in the port facilities and with over 170 ships docking in Belfast, visitors are able to get a taste for Northern Ireland as a destination and decide to come back for a longer stay. 45% of cruise passengers are from North America. This is an opportunity especially given the fact that Dublin is closed to Cruise ships.

- Transport Infrastructure – The strategic importance of Belfast as the principal gateway into Northern Ireland needs to be recognised with transport infrastructure supporting travel within Belfast and around the different regions.
 - With an estimated 3m visitors from outside of Northern Ireland, transport infrastructure policy and development needs to be based on the needs of our local communities and visitors. This includes both public transport and private transport operators. We are seeing an increase in electric vehicles and investment is required in our electric vehicle charging infrastructure

Skills

This is currently covered under the Inclusivity theme and mentioned in the Innovation theme. People are at the heart of the tourism industry and as such addressing the challenges of recruitment, retention and professional development are aspects which cut across all themes and should be specifically included within each theme.

Tourism has a track record of providing opportunities for all people including those who are further from the job market. We believe the strategy needs to make reference to the role which the skills division within the department, Department for Education and Department for Communities can play to enable co-ordinated transition from education and unemployment into diverse and accessible employment opportunities and supporting the sector in growing a skilled and professional workforce through upskilling and capability development.

We would like to see a bespoke Tourism Skills Action plan and recognition of the importance of tourism in skills policy. See the joint People and Skills focus policy paper produced by NITA and HATS [NITA-HATS-Policy-Focus-People-and-Skills-including-Action-plan.pdf](https://nitourismalliance.com) (nitourismalliance.com). Please see further comments in our response to question 4.

Attractive

Key to the achievement of the strategy is sustained investment in promotion of Northern Ireland as a destination both home and overseas markets. The additional £6M funding allocation to promotional activities by TNI and TI, as a result of the December monitoring round, will provide a boost to demand for 2024. This is welcome, however, we would like to get to a point where the upfront budget is better understood so all marketing campaigns are planned and flexed during the year as needed.

It is reassuring to see the inclusion of business tourism as a key indicator of Northern Ireland as an attractive destination. However, the importance of Business tourism/events is underplayed in the strategy document. Business tourism directly supports the development of the 10x cluster sectors and given the strides made by industry the strategy would benefit from at least one case study and acknowledgement of the Business Tourism Strategy as a component part of the tourism strategy. Business tourism is a growing market for Northern Ireland building on our previous success and recognition of the quality of our venues and proposition. It is imperative that the Department ensure the implementation of the Business Tourism/Events strategy which was developed with industry along with the necessary funding to maximise growth both for tourism and the cluster sectors set out in the 10X Economic vision.

The tourism strategy sets out the importance of having high quality, memorable and authentic experiences and it is critical that we continue to invest in the development of new experiences and refreshing existing experiences and assets. We are competing with our nearest neighbour Republic of Ireland for our share of visitors to the island of Ireland and we need to ensure we are keeping pace when it comes to development of product and support for the industry. The City

Growth deals are bringing much needed investment, the returns of which we will see in the next 3-5 years. However, continuous investment in our product and experiences is necessary. The budgets for Failte Ireland are around 6 times the level of budget allocation to Tourism NI. The budget at the beginning of the year to TNI is normally supplemented throughout the year through monitoring rounds which makes it difficult to plan for longer term investment and development of business support programmes.

To achieve growth in tourism over the next 10 years, development of further supporting infrastructure such as accommodation must be incorporated into future planning. There are exciting developments planned within the hotel sector, but further development will be required both within and outside of Belfast. The responsibility for supporting this development is moving from Invest NI to Tourism NI and clarity needs to be given on how this will work in practice.

Accessibility is another aspect that will increase our attractiveness as a destination. Recent research by Visit Britain estimated that the total expenditure on tourism trips in England by those with an impairment or those travelling within a group where a member has an impairment to be £14.6 billion annually. A lot of work has been done by industry and Councils in Northern Ireland to make our experiences and attractions accessible to all and we would like to see this included within the strategy.

Collaboration

Collaboration is critical to the successful delivery of the strategy, however, we see this as an underpinning behaviour not a theme. Collaboration and cross-departmental working are critical as the Department for the Economy do not hold all the policy levers that are required to address the range of challenges facing the industry, as laid out in the document. Cross departmental working is critical. How will this be facilitated? For example, Department of Communities have published a framework for the Culture, Arts and Heritage strategy – how do the two strategies align? There are other issues such as nighttime economy, lack of taxis, infrastructure for coaches, licensing/permits for tourism businesses, opening hours of supporting businesses such as restaurants and government owned attractions, air route expansion etc. The strategy does include an overview of each department (from page 52) but doesn't say how the policies in these departments will be influenced.

We would recommend that another section is added to the strategy to cover Governance, Accountability and Oversight. This should include:-

- Steering/Advisory Group – similar to that put in place for the Covid19 Tourism Recovery Plan including government departments/councils/industry
- Industry working alongside government to co-design programmes/initiatives
- Stakeholder and responsibility mapping to bring clarity for the delivery of the strategy.

Collaboration across the three tourism agencies on the island will be critical to addressing challenges, maximising opportunities and taking advantage of economies of scale to work more efficiently. We are pleased to see the development of the All-island Sustainable Assurance programme and identifying ways to replicate this kind of working, for example Employer Excellence, would be welcomed.

Maximising the collaboration opportunities with Visit Britain should be explored, particularly for long haul markets. Markets such as China/Asia are showing growth and for a lot of these visitors the UK access is the main gateway. Visit Britain are forecasting China/Asia market to be 4th biggest in 2024 and there is potential to exploit this for Northern Ireland.

Question 4 – Five most important actions

A number of the actions set out in the document are already in progress and it is important that this work continues with the right level of funding, for example – business tourism/events strategy, innovation programme, sustainable assurance scheme, sustainable tourism development programme.

1. We would like to see the Bespoke Skills Action plan developed. Our people are at the heart of tourism and the action plan should include:
 - Provision of a dynamic and engaging careers portal to showcase career development pathways, training and employment options in the sector.
 - Enhanced careers guidance in schools and all age.
 - Capability support to improve employer practices and reputation as an employment option.
 - Building employer capacity to embed and sustain apprenticeships in their business to address skills gaps and shortages and increase the diversity of the workforce.
 - Connecting businesses with students seeking work experience opportunities.
 - Provision of agile and flexible skills programmes to support upskilling in the sector to respond to emerging needs
2. Improved availability of data is critical to ensure progress is being made and provide evidence to change course if necessary.
3. Major events are a driver for growth and strategic direction is required on the types of events and specific events we want to see held in Northern Ireland.
4. Funded Delivery Plan with timescales and responsibilities
5. Plan for international marketing of Northern Ireland outside of GB and US (2 of 4 key markets identified in the document).

Question 6 – Further Comments

Governance

As we set out in our comments under Collaboration, we would like to see included a framework for Governance, Oversight and Accountability. This should include:-

- Steering/Advisory Group – similar to that put in place for the Covid19 Tourism Recovery Plan including government departments/councils/industry
- Industry working alongside government to co-design programmes/initiatives
- Stakeholder and responsibility mapping to bring clarity for the delivery of the strategy.

Delivery and Implementation Plan

This is a 10 Year plan and the key milestones over that period should be reflected in the final strategy document alongside resource commitments and requirements. This should be reflected in the plans for other government departments, where responsibility for delivery of some of the actions will lie.

International Markets

Four markets are identified as the primary focus within the strategy – Domestic, RoI, GB and USA. NITA would have concerns that with a primary focus on 4 markets this would not create a sustainable growth path for NI. We would urge the inclusion of EU – Germany, France, Netherlands etc and other long-haul markets such as Asia, India. Tourism Ireland is taking a

more opportunistic approach to long haul markets and alongside this we need to look at how we work with Visit Britain to maximise the promotion of NI into long haul markets. Market intelligence is forecasting China/Asia market to be 4th biggest in 2024 for UK inbound tourism and NI needs to be able to benefit from that.