



Northern Ireland  
Assembly

## Research and Information Service Briefing Paper

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# Northern Ireland tourism: sectors

## 1 Introduction

The following paper, which has been prepared for the Enterprise, Trade and Investment Committee, seeks to outline the tourism sectors which Tourism Northern Ireland is currently focused on. These sectors are summarised in Figure 1. This paper is intended to accompany NIAR513-15 on Northern Ireland's tourism structures.

Figure 1: Tourism sectors – as defined by Tourism NI



## 2 Tourism sectors

Tourism NI's Markets and Product Experiences Development Team '*develop marketing and promotional platforms to showcase product, build itineraries, develop trails and enhance web presence targeted to key consumer groups*'. According to Tourism NI, the team '*works across all aspects of culture, heritage and activities*', but has a current focus on seven sectors: music; food; gardens; activities; literature, theatre and screen; golf; and craft. <sup>1</sup> In addition Tourism NI works to promote sustainable, business and major events tourism.

This section provides an overview of these tourism sectors.

### 2.1 Golf Tourism

**Introduction:** Tourism NI works to promote Northern Ireland's golf product to the global market. They also '*have a role in product development, working with golf clubs and associated golf bodies and agencies to ensure the golfing visitor has a quality visitor experience throughout their trip*'. Their work is underpinned by the success of Northern Ireland's golfers, its '*world ranking golf courses*' and its success at hosting golf events.<sup>2</sup>

#### Key market data:

- The economic impact of golf tourism in Northern Ireland in 2014 was £33.2m. In 2013 the economic impact was estimated to be £27m. There was a year-on-year increase of £6.2m or 23%.
- The number of golfing visitors to Northern Ireland was 139,300 in 2014, up from 134,268 in 2013 – an increase of 3.7%.
- The economic impact of golf tourism from non-domestic golfers was estimated to be £24.6m in 2014. In 2013 the economic impact of non-domestic golfers was estimated to be £22.4, representing a year-on-year increase of £2.2m or 9.8%.
- The number of non-domestic visitors in 2014 was 22,293, up from 20,484 in 2013 – an increase of 8.8%.
- These figures mean that the average economic impact per visitor in 2014 was £238, whilst the average economic impact per non-domestic visitor in 2014 was £1,101, demonstrating the value of the out-of-state market.
- For each £1 spent on green fees, a further £4 is spent in the wider economy<sup>3</sup>

**Strategy:** Tourism NI's '*Strategic Review of Golf Tourism in Northern Ireland 2015-2020*' aims to grow the value of golf tourism from the current estimated £33m per

<sup>1</sup> <http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism.aspx>

<sup>2</sup> Tourism Northern Ireland, Golf <http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Golf.aspx>

<sup>3</sup> Tourism Northern Ireland, Golf Monitor (2015)

<http://www.tourismni.com/Portals/2/downloads/Tourism%20NI%20End%20of%20Season%20Overview%202014%20-%20full%20golf%20report.pdf>

annum to £50m and to *'remind golfers worldwide that "Northern Ireland is where golf champions are born and play"'*. It notes that globally golf tourism is estimated to be a \$33bn a year market but adds that £33m in economic value the sector brings to Northern Ireland leaves it *'trailing neighbouring destinations'*. Golf tourism generates an estimate £220m per year in Scotland, €202m in the Republic of Ireland and £38m in Wales.<sup>4</sup>

Tourism NI has set the following objectives up to 2020:

- Develop stronger clubs to participate in a dynamic quality assurance scheme (helping them focus on excellent service for visiting golfer);
- Clustering and collaboration – to encourage and support local golf cluster to promote collaborative marketing and learn from each other;
- Stimulate demand through a focussed marketing campaign aimed at targeted golfers and geographic segments;
- Optimise golfing events – maximise opportunities from golf events up to 2020 and position Northern Ireland as able to accommodate major golf tour events post-2020; and
- Leadership advocacy and champions – stimulate industry leadership to encourage engagement and commitment to the shared vision.<sup>5</sup>

Tourism Ireland has utilised Northern Ireland's golfing successes as a marketing tool. In recent months this has focussed on the Irish Open at Royal County Down. From early 2015 Tourism Ireland ran *'an extensive programme of promotions... highlighting the Dubai Duty Free Irish Open and our world class golf and encouraging more golfers to consider a golfing holiday here'*. This included advertisements on USA TV, promotions on Ireland.com, co-operative advertising with P&O Ferries, publicity in 'influential publications overseas', a media golf day which 26 leading British Golf writers participated in, a digital campaign promoting the Open in France, and 'Ezines promoting the Open in markets such as India, China, and Spain'.<sup>6</sup>

## 2.2 Literature, theatre and screen

**Background:** Screen Tourism is an emerging Tourism market in Northern Ireland, driven by the success of the Northern Ireland film and TV industry and the region's increasing popularity as a filming location. Tourism NI's work in the area of literature and theatre seeks to develop and promote experiences that draw on Northern Ireland's literary tradition.<sup>7</sup>

<sup>4</sup> *Ibid*

<sup>5</sup> *Ibid*

<sup>6</sup> Tourism Ireland, Spotlight on Northern Ireland Golf [https://www.tourismireland.com/Marketing/Marketing-Highlights/Marketing-Catalogue/Spotlight-on-Northern-Ireland-\(1\)](https://www.tourismireland.com/Marketing/Marketing-Highlights/Marketing-Catalogue/Spotlight-on-Northern-Ireland-(1))

<sup>7</sup> Tourism Northern Ireland, Literature, theatre and screen <http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Literature,TheatreandScreen.aspx>

**Key market data:** In 2014 a Game of Thrones Exhibition, jointly hosted by Tourism NI and Screen NI and supported by Belfast City Council, took place in Belfast.<sup>8</sup> The exhibition, which Screen NI has referred to as the ‘*high water mark*’ of its collaboration with Tourism NI, demonstrates the potential of the screen tourism sector:

- 11,000 tickets were allocated in a two hour period;
- 24% of visitors to the exhibition came were out-of-state visitors;
- The exhibition achieved £2.9m in international PR value; and
- £735,000 in direct spend was generated by the event.<sup>9</sup>

**Strategy:** Screen NI’s strategy ‘*Opening Doors*’ (2014-19) comments on the role the screen industries might play in ‘*the development of Northern Ireland’s tourism experience*’ and acknowledges the importance of partnership. It states:

*The Strategy recognises the role that the screen industries can play in supporting this vision in partnership with NITB and others.*

*While not all screen content contributes to the development of tourism, the production of internationally distributed television and films such as *Your Highness* and *Game of Thrones*, has the potential to have a catalytic impact on local tourism. During the Strategy term, Northern Ireland Screen will seek to extend and develop its partnerships with NITB and Tourism Ireland to ensure that we capitalise on the tourism potential of all screen production.*

*International film production is also high value added tourism in its own right, making a very substantial contribution to hotel bed nights and restaurant turnover.<sup>10</sup>*

Tourism NI has produced guidelines for tour operators ‘*to facilitate the successful and legal operation of tours to sites that are connected with the popular television programme*’. The agency will only promote and market tours which meet the guidelines.<sup>11</sup>

Tourism Ireland has also been promoting Northern Ireland’s links with Game of Thrones. For example, the agency produced a Game of Thrones marketing campaign – a 12 week social media campaign on Twitter and Facebook ‘*shows the fictional world of Westeros bleeding into the real world through a series of stunts*’. Short videos and images were posted to 3 million Facebook fans and 270,000 Twitter followers. The campaign was run to coincide with the fifth season and focused on markets in Great

<sup>8</sup> Tourism Northern Ireland Annual Conference 2015 Screen Tourism Seminar  
<http://www.nitb.com/Portals/2/downloads/Tourism%20Conference%202015%20Laura%20McCorry%20Screen%20Tourism%20Seminar.pdf>

<sup>9</sup> *Ibid*

<sup>10</sup> [http://www.northernirelandscreen.co.uk/DatabaseDocs/doc\\_776581.pdf](http://www.northernirelandscreen.co.uk/DatabaseDocs/doc_776581.pdf)

<sup>11</sup> Tourism NI, Tour Operator Guidelines – Game of Thrones  
<http://www.tourismni.com/Portals/2/SharePointDocs/2636/Game%20of%20Thrones%20Guidelines.pdf>

Britain, the United States, Canada, Australia, France, Germany, Spain, Italy, the Netherlands and Scandinavia.<sup>12</sup>

## 2.3 Music

**Background:** According to Tourism NI '*music, through events, home-grown performers and regular music programming offers visitors an engaging and exciting experience*'.<sup>13</sup>

**Key market data:** According to UK Music the total direct and indirect spend generated by music tourism in Northern Ireland in 2014 was £84m, comprised of £41m from visitors attending concerts and £43m from visitors attending festivals. The amount spent directly by music tourists in Northern Ireland in the same year was £47m. The sector attracted 260,000 visitors in 2014 and is responsible for sustaining 694 full time jobs.<sup>14</sup>

**Strategy:** Tourism NI carried out a study into music tourism as part of its 2011/12 Business Insights series. This included a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis of the region's music tourism offering. Table 1 provides a brief summary of these findings. The study concluded:

*NI has a comprehensive offer in music tourism. There is a particularly strong appeal for traditional music among overseas visitors, while the region has received a boost among a younger demographic, at home and abroad, on the back of the MTV European Music Awards. Maintaining a focus on traditional music while following up on recent promotional successes will ensure that the music tourism market will remain lucrative for the future. This will involve further promotion by tourism authorities and by operators in the music industry and music tourism segment.*<sup>15</sup>

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<sup>12</sup> Tourism Ireland Game of Thrones Campaign <https://www.tourismireland.com/Marketing/Marketing-Highlights/Marketing-Catalogue/Game-of-Thrones-Campaign>

<sup>13</sup> Tourism Northern Ireland, Music <http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Music.aspx>

<sup>14</sup> UK Music, Wish you were here 2015: Music Tourism's contribution to the UK economy (2015) [http://www.ukmusic.org/assets/general/WYWH\\_2015Report.pdf](http://www.ukmusic.org/assets/general/WYWH_2015Report.pdf)

<sup>15</sup> Tourism Northern Ireland, Music Tourism Business Insights Series 2012 <http://www.tourismni.com/Portals/2/SharePointDocs/2145/Music%20Tourism%20Business%20Insights%20final%20230512.pdf>

**Table 1: Tourism NI Music Tourism SWOT 2011/12**

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>• <b>Strong music background:</b> unique selling point in traditional heritage and modern international success;</li> <li>• <b>Variety:</b> NI music calendar has a wide range of acts to suit a range of tastes;</li> <li>• <b>Tourism on the rise:</b> overseas tourism market has shown growth, domestic tourism buoyant through recession;</li> <li>• <b>Impact:</b> Music tourism integral to 'nearly all other tourism segments' and has positive economic impact; and</li> <li>• <b>Value for money:</b> NI offers value for money relative to neighbouring markets.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Recognition:</b> NI may not achieved full music tourism potential and may not receive recognition in international markets;</li> <li>• <b>Music not enough on its own:</b> music an integral part of other tourism segments, but 'too niche' to be significant draw for overseas visitors;</li> <li>• <b>Music is mobile:</b> mainstream acts performing in NI also perform in other regions, limiting draw; and</li> <li>• <b>MTV awards impact may have been limited:</b> larger market for overseas visitors is traditional music and unique features of NI music scene.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Leverage big acts:</b> NI has been base for formation of international acts. Bringing these acts together for performances may better highlight NI music contribution;</li> <li>• <b>Traditional and modern:</b> traditional music is a core aspect of NI music scene, but opportunity to promote other genres on the back of MTV Awards and City of Culture;</li> <li>• <b>Emphasising low cost:</b> NI offers good value for domestic and overseas visitors, competitive advantage should be highlighted; and</li> <li>• <b>Partnering:</b> opportunities for partnership and product clusters between music sector and tourism industry.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Recent enthusiasm may wane:</b> MTV Music Awards and other events may have had some impact on the younger generation, <i>'it is important that these are followed up as events such as these may be quickly forgotten as the move on to new locations'</i>; and</li> <li>• <b>Neighbouring regions pose a threat.</b> GB is home to world famous music festivals such as Glastonbury, while Rol shares some similar music traditions. There is opportunity to collaborate with these markets, it is important that NI messages do not get lost relative to publicity from these neighbouring areas.</li> </ul>

Source: Tourism NI

### 8.3 Food

**Background:** Food Tourism is defined as *'any tourism experience in which a visitor learns about, appreciates and/or consumes food and drink that reflects the local or regional food culture, heritage or traditions'*.<sup>16</sup>

**Key market data:** According to Tourism NI GB and overseas visitors spent £138m on food and drink in Northern Ireland in 2012 (33% of their total spend). Domestic tourists on overnight trips within Northern Ireland spent £134m on food and drink (34% of their total spend). Domestic tourists on daytrips spent an estimated £73m on food and drink (35% of their total spend).

However, research carried out by Tourism NI in 2011 found that just 10% of GB and 6% of Rol visitors would come to Northern Ireland *'just for the food'*.

**Strategy:** Tourism NI views the leveraging of Northern Ireland's *'unique, interesting and high-quality local produce food based culture'* as *'a route to growing earnings for Northern Ireland'*. To help develop the sector it has produced the *'Our Food, So Good – Growing Your Food Tourism Potential'* toolkit which offers advice to food providers,

<sup>16</sup> Tourism NI, Our Food, So Good Tool Kit 2014

[http://www.tourismni.com/Portals/2/downloads/204114%20NITB%20Food%20Toolkit%20WEB\\_1.pdf](http://www.tourismni.com/Portals/2/downloads/204114%20NITB%20Food%20Toolkit%20WEB_1.pdf)

food producers and tourism producers on how to develop food related visitor experiences.<sup>17</sup>

It has also collaborated with Food NI to produce the Taste of Ulster Guide 2014/15 and the Food Producers Guide which details providers in Northern Ireland at sub-regional level.<sup>18</sup>

Tourism NI is currently preparing for the Northern Ireland Year of Food and Drink 2016, the programme's overall vision seeks to:

- Celebrate the quality, innovation and entrepreneurship in Northern Ireland's food and drink industry;
- Boost Northern Ireland's destination reputation by putting food and drink at the heart of the tourism experience; and
- Inspire trade, growth and visitor spend.<sup>19</sup>

The Year of Food and Drink will comprises of themed months and events designed to promote Northern Ireland food. It is being brought forward in collaboration with Food NI, local authorities, DARD, DEL and Invest NI.<sup>20</sup>

## 8.5 Gardens

**Background:** Northern Ireland has a strong horticultural history. Tourism NI works to develop garden assets for the tourism market.<sup>21</sup>

**Key market data:** In 2008 46,400 overseas tourists visited gardens in Northern Ireland. In 2009, the number of visitors to NI gardens fell to 41,800 – in-line with the overall decrease in overseas visitors.

Overall visitor numbers to Northern Ireland's gardens between 2007 and 2011 are outlined in Table 2. Belfast's Botanical Gardens has historically attracted the highest visitor numbers, averaging 670,000 visitors (both overseas and domestic) in the period.<sup>22</sup>

<sup>17</sup> Tourism NI, Food <http://www.tourismni.com/BusinessSupport/Culture.HeritageandActivityTourism/Food.aspx>

<sup>18</sup> *Ibid*

<sup>19</sup> Tourism Northern Ireland, Northern Ireland Year of Food and Drink, A Toolkit (2015)

[http://www.tourismni.com/Portals/2/downloads/205155%20YOFD%202015%20Toolkit%20booklet\\_WEB.pdf](http://www.tourismni.com/Portals/2/downloads/205155%20YOFD%202015%20Toolkit%20booklet_WEB.pdf)

<sup>20</sup> *Ibid*

<sup>21</sup> Tourism Northern Ireland, Gardens

<http://www.tourismni.com/BusinessSupport/Culture.HeritageandActivityTourism/Gardens.aspx>

<sup>22</sup> Tourism Northern Ireland, Gardens and Tourism – Business insights series 2011/2012 (March 2012)

<http://www.tourismni.com/Portals/2/SharePointDocs/2259/Gardens%20Tourism%20Report%202012%20Formatted%20140312%20%281%29.pdf>

**Table 2: Visitor numbers for Gardens 2007-2010**

	2007	2008	2009	2010	2011
Botanic Gardens Belfast	660,000	660,000	700,000	679,000	650,000
Mount Stewart House and Gardens	128,000	133,452	122,884	150,000	150,517
Castle Ward House and Demense	62,301	57,336	80,000	103,322	126,006
Tannaghmore, County Armagh	n/a	80,000	85,000	85,000	n/a
Joey Dunlop Memorial, County Antrim	76,500	80,000	80,000	80,000	12,000
Florencecourt House & Gardens	30,664	30,000	32,813	38,505	40,314
Grovelands, Belfast	4,600	5,000	n/a	23,000	n/a

Source: DETI and MINTEL

**Strategy:** Tourism Northern Ireland produced a study of Gardens and Tourism as part of its Business insights series 2011/2012. Table 3 presents Tourism NI's SWOT analysis for Northern Ireland gardens.

**Table 3: Northern Ireland Gardens SWOT analysis 2012**

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>• <b>Established Gardens:</b> a 'wealth of top-class gardens';</li> <li>• <b>Bright future ahead for tourism:</b> wider tourism trends and positive press suggest sector growth;</li> <li>• <b>Garden events:</b> NI has a 'full events list for the garden tourist';</li> <li>• <b>Price advantage:</b> Gardens offer a low cost activity</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Late development of garden trails:</b> Both GB and RoI have established garden trails, some have been set up in NI however more publicity is needed;</li> <li>• <b>Marketing to be expanded:</b> the overall marketing of NI gardens is not as developed as RoI or GB;</li> <li>• <b>Belfast primary visitor destination:</b> Belfast is primary destination for tourists, other regions may struggle to appeal; and</li> <li>• <b>Lack of appropriate road signage:</b> trade interviews suggest that a lack of signage has led to difficulties for tourists making their way to their destination.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Potential for development:</b> potential to develop garden network. Private gardens opening up will increase garden offering;</li> <li>• <b>Promoting gardens as a value for money option:</b> Gardens can further promote their strength as a low-cost activity. More awareness will lead to more visits;</li> <li>• <b>Linking properties in NI:</b> Linking gardens to other properties in NI in close proximity could increase tourism to these properties; and</li> <li>• <b>Exploring activities in gardens:</b> Workshops, demonstrations, concerts and festivals have are commonly used by international gardens to attract tourism.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Drop in overall tourism figures:</b> at time of publication the economic crisis was creating problems for the tourism industry; and</li> <li>• <b>Competition from other sectors:</b> Other types of outdoor areas such as forests and parks and other tourism activities such as music, food and sporting events, seem to have the edge on garden tourism.</li> </ul>

Source: Tourism NI

## 8.6 Activity Tourism

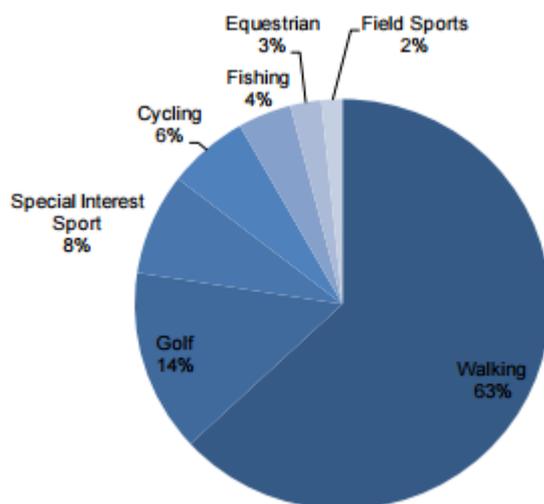
**Background:** Development of activity tourism in Northern Ireland is delivered 'through a service level agreement with Outdoor Recreation Northern Ireland who is responsible

for industry engagement and development of activity specific websites'. Tourism NI is currently focussed on adventure, walking, mountain biking, cycling and canoeing.<sup>23</sup>

**Key market data:** Tourism NI estimates that the activity tourism market is valued at between £90m and £100m per annum. Of this it is estimated that £55m comes from overseas tourists engaged in activity tourism.<sup>24</sup>

In 2009, 236,000 overseas tourists took part in an activity whilst in Northern Ireland. Figure 2 provides details of the types of activities engaged in by overseas tourists in 2009. The most popular activity was walking (63% of respondents took part in this activity), followed by golf (14%).<sup>25</sup>

**Figure 2: Overseas visitor activity participation by activity type 2009**



Source: Tourism NI and MINTEL

**Strategy:** Tourism NI published a SWOT analysis of activity tourism in Northern Ireland as part of its business insights series. This is summarised in Table 4. In addition, Tourism NI has produced a range of material on activity tourism, this includes the Forestry Study Report an industry guide for mountain biking and a Strategic Review of Angling (2013) prepared in anticipation the development of an angling strategy.<sup>26</sup>

<sup>23</sup> Tourism Northern Ireland, Activity Tourism

<http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Activities.aspx>

<sup>24</sup> Tourism Northern Ireland, Activities, Business Insight Series 2011

<http://www.tourismni.com/Portals/2/SharePointDocs/1544/Activities%20Tourism%20Business%20Insight%20Feb%202011%20Final.pdf>

<sup>25</sup> *Ibid*

<sup>26</sup> Tourism Northern Ireland, Activities

<http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Activities.aspx>

**Table 4: Northern Ireland Activity Tourism SWOT analysis 2011**

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <li>• <b>Range of activities:</b> NI offers a diverse range of activities to suit a variety of users.</li> <li>• <b>Clear interests in activities:</b> Both the consumer research and review of sector reports show that there is a clear interest in activities and that this segment of the market is outperforming the wider market for tourism in global terms.</li> <li>• <b>Reputation:</b> NI has a reputation for quality canoe trails, of which five have been developed throughout NI and three new coastal trails under development</li> <li>• <b>Price advantage:</b> NI has a lower cost base and offers better value for money than some neighbouring markets.</li> <li>• <b>Natural environment:</b> The coastline and countryside of NI offer natural environment for activity tourism.</li> <li>• <b>Compact destination:</b> Given the small geographic area, activities and points of entry to NI are relatively close to one another.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Venues:</b> Lack of multi-use venues to act as hubs for both soft and hard adventure.</li> <li>• <b>Knowledge gap:</b> Poor knowledge of opportunities for activities within the tourism industry</li> <li>• <b>Climate:</b> Most activities involve the outdoors and with a relatively poor climate, activities may only be appealing to enthusiasts during poorer spells of weather.</li> <li>• <b>Falling visitor numbers (at time of publication)</b> had a negative effect on dedicated activity breaks in Northern Ireland.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Ideal learning destination –</b> Many tourists who are thinking about an activities holiday for the first time are looking closer to home to try it out, rather than going to the expense of a distance holiday they may not enjoy. NI could capitalise on this.</li> <li>• <b>Partnering:</b> participation on holidays is done as part of a wider ranging holiday. Partnering between activities providers, accommodation providers, cultural facilities/events, wildlife tourism operators and other stakeholders in the tourism sector, could help to develop more wide ranging itineraries and packages.</li> <li>• <b>Incentive travel:</b> As part of the business travel market, incentive travel has been hit hardest by recessionary times. Yet this has been traditionally associated with more exotic destinations. Promoting low cost incentive travel may draw activities tourism from the business communities in key source markets.</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Aging population:</b> Activities are more popular among younger adults and an aging population presents the largest threat to the future viability of more physical activities.</li> <li>• <b>Consumer confidence:</b> When economic conditions improve domestic tourists may be more confident about booking overseas holidays, rather than looking to lower cost alternatives at home.</li> <li>• <b>Longer working weeks:</b> Anecdotal evidence suggests that consumers are working harder in the current climate. This may result in tourists looking to solely relax when they are on holiday, rather than participating in as much sporting activity.</li> </ul>

Source: Tourism NI

## 8.7 Craft

**Background:** Tourism NI note that research ‘shows that more visitors are looking for authentic experiences and want to engage with local communities as well as or instead of, being passive consumers of cultural experiences’. Craft, they argue, is a ‘growing part of this experiential tourism offering’.<sup>27</sup>

**Key market data:** Northern Ireland is home to over 400 craft producers.<sup>28</sup>

**Strategy:** Tourism NI works with local authorities, the culture sector and over industries to develop the craft industry’s interactions with tourism. For example August Craft

<sup>27</sup> Tourism Northern Ireland Craft <http://www.tourismni.com/BusinessSupport/Culture,HeritageandActivityTourism/Craft.aspx>

<sup>28</sup> Ibid

Month – a ‘month long series of craft exhibitions, demonstrations, workshops, open studios and retail opportunities’ – has been developed in collaboration with Craft NI.

Tourism NI has also supported two Northern Ireland craft producers and one artisan food producer (Causeway Coast and Glens business: Scullion Hurls, Steensons Jewellers and Broighter Gold Rapeseed Oil<sup>29</sup>) to become participants in the international Économusée programme. The Économusée programme is a project of the EU’s European Regional Development Fund. The programme ‘aims to bring the visitor market in direct contact with indigenous crafts where they take place’ by developing exhibition areas around craft producers.<sup>30</sup>

## 8.8 Sustainable tourism

**Background:** Tourism NI defines sustainable tourism as ‘an evolution in the way of doing things – not a type of tourism product’. It incorporates ‘responsible tourism’, ‘green tourism’, ‘ethical tourism’ and ‘eco-tourism’.<sup>31</sup>

**Key market data:** Tourism NI’s Business Insight Series publication ‘The Future of Sustainable Tourism’ notes that for 32% of visitors from NI and the RoI are ‘encouraged’ to stay in ‘accommodation with green credentials’.<sup>32</sup>

**Strategy:** Tourism NI has produced a report on the ‘Future of Sustainable Tourism’, this notes:

*In a NI context, [sustainable tourism is] about protecting and enhancing the future of the local tourism industry. The principles of sustainability are key to safeguarding the authentic tourism products on which Northern Irish tourism depends. Our living legends, our coasts and lakes, our unique outdoors, our culture and creative vibe – all need to be protected against the environmental and social impacts of tourism development. Visitors benefit from a sustainable approach through cared-for natural and built products that have closer links with local communities, leading to a better all-round visitor experience.*

*Individual businesses also stand to benefit. For one, there are cost savings to be made in following sustainable best practices such as improved management of energy, water and waste.*<sup>33</sup>

<sup>29</sup> Causeway Coast and Glens Heritage Trust, ÉCONOMUSÉE Northern Ireland <http://ccght.org/sustainability/economusee-northern-ireland-artisans-at-work/>

<sup>30</sup> Tourism Northern Ireland Craft <http://www.tourismni.com/BusinessSupport/Culture.HeritageandActivityTourism/Craft.aspx>

<sup>31</sup> Tourism Northern Ireland, The Future of Sustainable Tourism, <http://www.tourismni.com/Portals/2/SharePointDocs/2433/Intelligent%20Vision%20Series%20-%20The%20Future%20of%20Sustainable%20Tourism.pdf>

<sup>32</sup> *Ibid*

<sup>33</sup> *Ibid*

Tourism Northern Ireland has produced a '*Green Guide*' designed to support business through the process of becoming a green business and to attract new customers through and save money through this process.<sup>34</sup>

The agency itself has received a Green Tourism Silver Award in September 2013.<sup>35</sup>

## 8.9 Business tourism

**Background:** Tourism NI's Business to Business Unit are responsible for promoting Northern Ireland as business tourism destination.

**Key market data:** Between January and December 2013, there were 417,000 business trips to Northern Ireland (equivalent to 9% of all trips). This fell in by 10% 2014, when there were 376,000 (8% of all trips). GB business trips proved to be the exception to this increasing by 1% in this period.<sup>36</sup>

**Strategy:** Tourism NI's marketing activity in relation to business tourism includes:

- Familiarisation trips;
- Recruitment for International Business Tourism Trade Shows;
- Sales calls;
- Management of the Belfast & Derry Conference Subvention Programmes.<sup>37</sup>

In addition, through its customer facing website, Discover Northern Ireland, it publishes a range of brochures tailored to the business tourism market. These include information on conferences and corporate meetings, sample incentive itineraries and luxury business tourism.<sup>38</sup>

## 8.10 Major events

**Background:** Tourism NI is seeking to build on the momentum created through the NI 2012: Our Time, Our Place campaign to develop Northern Ireland's reputation as a place to stage '*world-class events*'.<sup>39</sup>

**Key market data:** Tourism Northern Ireland has published a number of studies on the impact of events held in recent years. For example, a review of NI 2012: Our Time, Our Place found:

- 1,054,972 visitors attended NI 2012 event or visited Northern Ireland because of NI 2012.

<sup>34</sup> Tourism Northern Ireland, Going Green (February 2014)

<http://www.tourismni.com/Portals/2/SharePointDocs/2722/NITB%20Green%20Guide%20Feb%202014.pdf>

<sup>35</sup> Tourism Northern Ireland, Green Tourism Scheme

<http://www.tourismni.com/BusinessSupport/GrowYourBusiness/SustainableTourism.aspx>

<sup>36</sup> Tourism Northern Ireland, Northern Ireland Tourism Performance Overview (January – December 2014)

[file:///C:/Users/stennetta/Downloads/TNI+Tourism+Performance+Figures+Jan-Dec+2014+Annual++Report\\_1%20\(2\).pdf](file:///C:/Users/stennetta/Downloads/TNI+Tourism+Performance+Figures+Jan-Dec+2014+Annual++Report_1%20(2).pdf)

<sup>37</sup> Tourism Northern Ireland, Business Tourism <http://www.tourismni.com/BusinessSupport/BusinessToBusiness/Business.aspx>

<sup>38</sup> Discover Northern Ireland, Business Tourism <http://convention.discovernorthernireland.com/Brochures-DVD-and-Maps-A2478>

<sup>39</sup> Tourism NI, Major Events <http://www.tourismni.com/BusinessSupport/MajorEvents.aspx>

- NI 2012 generated an economic impact of £17,836,506 and a tourism impact of £42,200,518.
- 650 journalists visited Northern Ireland as part of media trips associated with NI 2012, generating £35.8m in positive PR exposure. Promotion through Northern Ireland media generated £1.968m in positive PR, while promotion in the Republic of Ireland generated £6.78m in positive PR. The eight ni2012 Tier 1 events generated £70.5m in weighted PR coverage.<sup>40</sup>

**Strategy:** In recent years Northern Ireland has hosted a range of events. Beginning with the NI 2012 Our Time, Our Place campaign, Tourism NI has heavily promoted Northern Ireland as a place that can ‘stage world-class events’. During that year Northern Ireland hosted:

- The Titanic Belfast Festival 2012;
- The Peace One Day concert;
- The Irish Open;
- The Clipper Homecoming Festival;
- The Land of Giants;
- The Peace Camp;
- FLAGS (an installation by German artist Hans Peter Kuhn); and
- The 50<sup>th</sup> Ulster Bank Festival at Queens.<sup>41</sup>

In subsequent years Northern Ireland has continued to host international events including:

- Dubai Duty Free Irish Open 2015;
- UK City of Culture 2013 – Derry/Londonderry;
- Giro d’Italia Big Start 2014;
- The G8 Summit – Fermanagh; and
- The World Police and Fire Games.

In addition it has been recently announced that the 148<sup>th</sup> Open will be played at Royal Portrush in 2019.

### 3 The diaspora

In addition to the sector being actively pursued by Tourism NI (as outlined above) work is underway on a cross-sectoral basis to reach out to Northern Ireland’s diaspora. In July 2012, the Minister for Enterprise, Trade and Investment launched the Northern

<sup>40</sup> Tourism Northern Ireland, NI 2012: Our time, Our Place story  
<http://www.tourismni.com/Portals/2/SharePointDocs/2645/NI2012%20Review%20-%20WEB.pdf>

<sup>41</sup> Tourism Northern Ireland, NI 2012 Our Time, Our Place story  
<http://www.tourismni.com/BusinessSupport/MajorEvents/Ourtime.Ourplacestory.aspx>

Ireland Connections website. At the launch of the not-for-profit programme the Minister stated:

*A wide range of organisations in Northern Ireland consider the diaspora community a key audience, resource or market and are already working to engage with this group as a means of raising awareness and promoting Northern Ireland around the world. By creating this new, not-for-profit organisation to take the strategic lead and determine the best method for interacting with the diaspora community we can ensure all interactions with this target group are strategic, co-ordinated, timely and effective. One of its key responsibilities will be to develop and maintain a global network of advocates who will be in a position to communicate key strategic messages in their country and sector, facilitating developments in Foreign Direct Investment, trade, education, investment and tourism in Northern Ireland.<sup>42</sup>*

Northern Ireland Connections is funded by a member subscription system, open to public and private organisations, with governance be delivered by an unpaid non-executive Supervisory Board.<sup>43</sup> The project is funded by of a range of sponsors including Invest Northern Ireland, Tourism Northern Ireland, Tourism Ireland, Visit Belfast, Belfast Harbour, local councils, Queen's University Belfast, Ulster University, the British Council, Belfast International Airport, George Best City Airport, Northern Ireland Science Park, the Odyssey Trust, and the Titanic Quarter.<sup>44</sup>

The goal of Northern Ireland Connections is 'to be the established diaspora network for 150,000 friends of Northern Ireland globally' by 2020. The project works across four core areas: education, investment, innovation and tourism.<sup>45</sup> Since 2013, the organisation has supported 30 events in 16 cities across four continents.<sup>46</sup>

In October 2015 a Belfast Homecoming conference was held at Titanic Belfast and other venues across the city. The event, which entered its second year, brought together ex-pats from around the world, including a 40 person delegation from the New York State Legislature. The focus of three-day conference was business, investment, the arts, job creation, tourism and education.<sup>47</sup>

<sup>42</sup> Tourism NI, Website launched for Northern Ireland diaspora

<http://www.tourismni.com/NewsMedia/LatestNews/tabid/180/EntryId/219/Website-Launched-For-Northern-Ireland-Diaspora.aspx>

<sup>43</sup> *Ibid*

<sup>44</sup> Northern Ireland Connections About Us <https://www.niconnections.com/about/about-us>

<sup>45</sup> Agenda NI, Northern Ireland Connections (15 June 2015) <http://www.agendani.com/harnessing-power-diaspora/>

<sup>46</sup> Agenda NI, Bringing business back to Northern Ireland (24 August 2015) <http://www.agendani.com/bringing-business-northern-ireland/>

<sup>47</sup> The Irish News, Ex-pats gather for Belfast homecoming conference (7 October 2015)