

Creating a Compelling

International Destination

TOURISM NI ANNUAL REVIEW 2017/18



tourism
northernireland





John McGrillen, CEO Tourism NI, Nóirín Hegarty, Lonely Planet's Operations Director Ireland and Niall Gibbons, CEO Tourism Ireland

Terence Brannigan
Tourism NI Chairman



Another Excellent Year for Tourism

Welcome to Tourism NI's annual review, which outlines the industry's strong performance in 2017/18 and shines a light on the impact of a range of excellent achievements. This was a period that brought high-profile recognition by Lonely Planet, with Belfast and the Causeway Coast named the number one region in the world to visit in 2018, significantly boosting our marketing efforts.

The recently released 12-month statistics for last year demonstrate Northern Ireland's tourism industry put in yet another performance to be proud of. With growth achieved in all our main markets, the year can only be viewed as a highly positive one across all aspects of the industry.

Northern Ireland Statistics and Research Agency figures show that 4.9 million overnight trips were taken in Northern Ireland in the period January to December 2017, up 6% on 2016.

I am particularly pleased to note the rise in visitor spend, a figure that increased by 9%, to an unparalleled £926 million. This equates to a visitor contribution of £2.5 million per day to the local economy, creating and supporting jobs and helping to build vibrant and prosperous communities.

These figures demonstrate the upward trend and level of investment by the hotel and wider accommodation industry.



£926m
spend



4.9m
trips



16.9m
nights



A record
1m visitors
to the Giant's Causeway
in 2017

Northern Ireland's attractions and activity providers also enjoyed a great year with the Giant's Causeway welcoming a record 1 million visitors and Titanic Belfast posting its busiest year to date with 771,000 visitors through the doors.

Our programme of work underpinned the very positive tourism picture. Increased marketing activity by Tourism NI in the Republic of Ireland helped to forge a strong recovery in our closest home market, following a decline in the recent past.

An increase in business trips, favourable exchange rates and high-profile events like the Irish Open and the Women's Rugby World Cup all contributed to the record-breaking January to December performance.

We have worked closely with the industry in 2017 to develop strategies that contributed to unlocking the growth potential of all our key markets. Consequently, the tourism

economy continued to mature, develop and maintain its long-term upward trend. We have now achieved steady growth for the past number of years and despite economic and political challenges at home and elsewhere, tourism remains vital to economic development and job creation in Northern Ireland.

A pivotal piece of work this year was the report by the Republic of Ireland Taskforce – a group charged with developing a strategy to grow revenue from Republic of Ireland visitors to £140m by 2025. I am deeply grateful to RoI Taskforce chairman Eamonn McKeon and all the taskforce members for their sterling efforts on behalf of tourism in Northern Ireland.

Going forward, Tourism NI remains highly committed to working in partnership with destinations, attractions, accommodation suppliers and all other businesses and

stakeholders in the tourism sector to realise the possibilities that tourism can undoubtedly deliver.

Terence Brannigan
Tourism NI Chairman

Republic of Ireland Taskforce

Target of

£140m



revenue from RoI
visitors by 2025



RoI Tourism Recovery Taskforce chairman
Eamonn McKeon at the publication of the report
in November 2017

Marketing Success

The results of our marketing campaigns



Say Hello to More Marketing Success

More to do, more to see and experience - altogether more for your short break - that was the promise of Tourism NI's autumn and spring marketing campaign in the Republic of Ireland.

For the first time, working directly with over 80 tourism businesses, the campaigns helped to deliver 371,000 overnight trips to Northern Ireland and almost £50m to the economy. This yielded a return on investment ratio of 1:56.

Overseas Publicity Support

A highlight of our international communications programme was our cooperation with Tourism Ireland and Easy Voyage in a six week pan-European marketing campaign aimed at creating awareness of Northern Ireland. This engaged more than 2.1 million people across six European markets. Some 55 businesses submitted offers that were showcased across social and digital media channels, banner campaigns, e-newsletters and a dedicated microsite. The campaign resulted in over 9,500 referrals to participating businesses.



Cooperative European Campaign with Tourism Ireland

Tourism NI Republic of Ireland campaign



The Business of Tourism

Buoyant Accommodation Sector

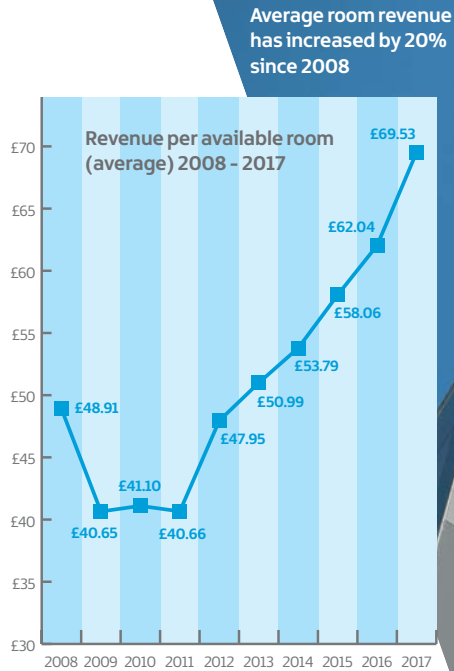
Our accommodation sector has been buoyant during this period, with hotels recording a total of 2 million rooms sold between January and December – an increase of 4% on the previous year. The figures for guesthouses, B&Bs and guest accommodation support the positive tourism performance with a 10% increase in rooms sold last year compared with 2016.

Hotel Expansion

Hotel expansion continues at a steady pace across Northern Ireland to meet the demands of our growing tourism industry. By the end of 2018, hotel room numbers are likely to break the 9,500 level which is the biggest growth period in a decade. While most of the expansion is in Belfast, the Northern Ireland Hotels Federation have noted a similar percentage growth for Derry~Londonderry with 250 rooms planned for the city.

Steady Growth

There was steady occupancy growth throughout 2017 and into 2018 across Northern Ireland and room rates in all areas improved. Belfast performed particularly well, with an increase of almost 14% in 2017. Increased hotel supply is having a positive effect on both room occupancy and room revenue.



A number of additional exciting schemes are in the early stages of development and aim to offer more than traditional tourist accommodation. If progressed, they will be located in rural and coastal settings and will be targeted at visitors that want to experience local culture and heritage in unique and interesting ways.



Tourism NI's certification team has expanded to meet demand



Hotel rooms sold **↑4%**

Guesthouses, B&Bs guest accommodation **↑10%**



Shipquay Hotel, Derry~Londonderry



AC Hotel by Marriot, Belfast

Meet the Buyer 2018



5,000
appointments



211
international
operators



22
countries

Routes Europe Conference

One of the stand-out business events of 2017 was the Routes Europe Conference held at the Belfast Waterfront. One of the most successful events ever held in Northern Ireland in terms of visitor numbers and spend, it was delivered in partnership with Invest NI, Visit Belfast and the three local airports. The event promoted Belfast and Northern Ireland as both a tourism and business destination to more than 100 airlines across Europe.

It was a record-breaking event with 5,000 meetings taking place and a short-term economic impact of £1.3m. Belfast International Airport announced eight new European routes as a direct result of conversations in the run-up to the conference and the announcement created 50 new jobs. The partnership event was highly impactful, with 83% of attendees having a more positive perception of Belfast as a result of attending Routes.



During this period Tourism Northern Ireland was a key partner in securing the sixth annual Hosts Global Forum for Northern Ireland, attracting 200 of the world's leading destination management companies and meetings and incentive

buyers. It marks the first time the event has ever come to Europe. The forum is an exclusive, invitation-only global MICE event whose buyers account for \$2 billion in business tourism revenue worldwide.



Routes Conference - a partnership event

International Business Tourism Platforms

2017 saw the Business Solutions team lead delegations of 12 industry representatives to the major international Business Tourism platforms including IMEX Frankfurt, IMEX US, IBTM Barcelona and two GB platforms. These delegations had more than 550 sales appointments with global Meetings, Incentives, Conference and Exhibitions (MICE) buyers and generated 86 "warm leads" worth approximately £27.97m.



550
sales
appointments



worth approx
£27.97m



Attendance at Meet The Buyer 2018 was up by 40%



Partnership and collaboration through the Meet in Ireland platform

International Travel Trade

Meet the Buyer 2017 and 2018 moved to a new venue at Belfast Waterfront where it has gone from strength to strength. In 2018 more than 5,000 sales appointments took place, with industry representatives meeting 211 international operators from 22 markets.

Initial feedback from the 2018 event has been very positive with 97% of operators indicating that they are now "likely" to contract with a new Northern Ireland supplier, with 70% "very likely". Some 78% of the operators who attended expect to do business in 2018 and 2019. In addition, 38% of operators expect to increase their business to Northern Ireland by 10%, with 44% of them expecting business to Northern Ireland to grow by up to 25%.



Tourism NI's representatives with the European Tourism Association

FACTS AND FIGURES - 2017

7%



Spend by visitors from outside Northern Ireland increased by 7%

2 million



2 million hotel rooms were sold

£926m



Visitors spent an unprecedented £926 million

221,000



Spring's 'Say Hello to More' marketing campaign delivered 221,000 overnight trips from Republic of Ireland visitors, and contributed £40m to the local economy



92,000



The highly successful Dubai Duty Free Irish Open attracted 92,000 visitors



Tourism is a key economic driver in Northern Ireland bringing £2.5m per day to the local economy

4.36m



consumer social media engagements

204



international media familiarisation visits

£40m



12% increase in golf tourism revenue

53



Tourism NI supported 13 international events and sponsored 40 national events

112



Cruise ship dockings increased by 20%

LOOKING AHEAD



£500m

£500m will be invested in the accommodation sector by 2020, with over 2,000 new rooms coming on-stream by the end of this decade



2,000

Industry Inspired

New Products and Attractions

To continue to compete on a global scale we need to innovate and develop new and unique visitor attractions.

In 2018, our maritime tourism offering led the way with the opening of the fully restored HMS Caroline and Pump House, the Titanic Walkway and the Great Light (Mew Optic) - one of the largest of its kind ever built. With free public access, this unique maritime heritage object tells the story of lighthouses, their keepers and their role in Northern Ireland's proud maritime, industrial and economic heritage.

A number of new and exciting tours and visitor attractions have been developed over the past year to offer unique and



The Great Light, Titanic Walkway



330 businesses participated in Republic of Ireland market workshops

immersive experiences. Key experiences include: the Irish Feast organised walking food tours in Glenarm, Ballycastle, Bushmills and Rathlin Island; Ards Peninsula Tours which covers topics from smuggling to sea level change, and Larne-based Trout Tours NI.

For a unique perspective on familiar terrain, Born to Run tours of Belfast and the Causeway Coast offers guided running tours covering roads, forests and mountains to share Northern Ireland's beauty and history.

Implementation of the Republic of Ireland recovery strategy got underway in January and since then more than 330 businesses have taken part in workshops and a range of online support and toolkits have been developed.



Born to Run Tours



Rathlin walking tour



Launch of China Ready Programme



Tourism NI has worked closely with Lonely Planet to maximise the Best in Travel accolade



Developing Markets

In conjunction with Failte Ireland and Tourism Ireland, we carried out a review of the Developing Markets and signed-up to a project to ensure our industry is ready to meet the needs of China, India and the UAE. A pilot “China Ready” programme, delivered by the Centre for Competitiveness in Ireland and created by the China Outbound Tourism Research Institute (COTRI), was tested on a small group of industry professionals.

Visit Belfast and the three Belfast-based Hastings Hotels underwent the training and received China Ready accreditation from COTRI. Tourism NI has now agreed to support the rollout of the COTRI programme to a further 70 participants.

Building on the Causeway Coastal Route Lonely Planet accolade

A sustained period of development work by Tourism NI is set to capitalise on recent Lonely Planet recognition for this area. Tourism NI’s Visitor Experience and Industry Development teams have helped to create compelling visitor experiences along the route which will be accessible in the international marketplace.

These include sea trips, Game of Thrones®, beach rides, forest experiences, tours of Coleraine’s heritage, Rathlin Island experiences, Ulster Scots heritage and food tours.

These experiences are purchasable, accessible, bookable and tailored to provide stand-out in the marketplace while connecting visitors to the local people, landscapes and culture.

Industry Development Programme

- 40 Industry Development events were delivered with a strong focus on maximising the potential of the RoI market.
- A highly successful Sales & Marketing Skills Programme was tailored for the Cluster Groups.
- Tourism NI engaged with 1,250 delegates.
- 73.3% of delegates planning to take action as a direct result of attending an Industry Development event.
- Overall satisfaction rates of 96%, with 85% of delegates rating the Industry Development Programme events ‘Very Good’ or ‘Excellent’.



Game of Thrones® Potential

Getting our 'Head in the Game' for Industry

In early 2018, we held a 'Game of Thrones® – Get Your Head in the Game' industry event to bring together all those hoping to leverage the unique opportunity presented by Game of Thrones®. Held at the Odeon Cinema in Belfast's Victoria Square, the event attracted more than 200 local tourism providers and highlighted the significant and continued opportunity of Game of Thrones®, generating real excitement amongst delegates.

We work closely with Tourism Ireland and support their international promotional initiatives. Bridging the gap between the fantasy of the show and the real-world

locations, Tourism Ireland, in partnership with HBO, has created highly innovative social media campaigns. Celebrating Northern Ireland as Game of Thrones® Territory, the campaigns are reaching millions of new consumers.

The award-winning Doors of Thrones® campaign has reached an amazing 126 million people around the world. The ten doors, specially crafted from trees blown down in Storm Gertrude at the Dark Hedges, are located in pubs and restaurants across Northern Ireland. Tourism NI launched the 'Journey of Doors' Passport, inspiring fans to explore Northern Ireland and discover the ten doors, collecting a unique stamp at each venue.



Get Your Head in the Game industry event



Game of Thrones® Passport launch

Building on the success of the Doors of Thrones® campaign Tourism Ireland created the Game of Thrones® Tapestry as a central asset for the 2017 campaign. We worked with Tourism Ireland and National Museums Northern Ireland to install the impressive 80m long medieval-style wall-hanging in the Ulster Museum. The Tapestry is on temporary display at the Museum until the end of August 2018 and has attracted more than 130,000 visitors since its opening in July 2017.

Tens of thousands of fans are being attracted to Northern Ireland each year because of the epic fantasy series. Tourism NI estimates that in 2016, more than 120,000 visitors were influenced by Game of Thrones® in their decision to visit Northern Ireland, generating around £30m in the local economy. As audience levels of the fantasy show grow with each successive season, so too does the tourism opportunity for Northern Ireland.



Game of Thrones® international media visits

Positive impact of major events

Events enhance the visitor experience, increase visitor numbers and spend, develop the appeal and profile of the area, and elongate the tourism season. In 2017, tourism NI supported 12 international events and sponsored 40 national events which showcased Northern Ireland's regions and destinations, allowing our visitors to get closer to our authentic people, places and personalities.

They included the North West 200, Giro Gran Fondo, Belfast Titanic Maritime Festival, Super Cup NI, the Ulster Grand Prix and Féile an Phobail.



Féile an Phobail, Belfast

Out of the 12 Tourism NI supported international events, an average of 41,000 spectators attended each one, generating 25% out-of-state visitors and delivering almost 8,000 bednights, with an economic impact of more than £1.4m per event.

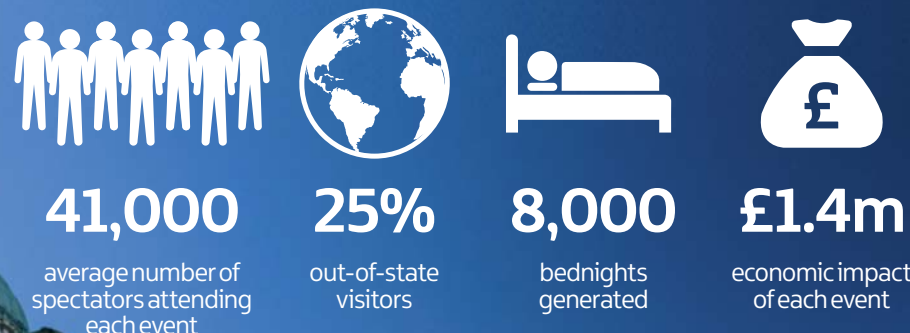


Titanic Maritime Festival

The UEFA Women's Under 19 European Football Championships and the Women's Rugby World Cup delivered exceptionally large visitor numbers - nearly 50,000 across the two events, equating to almost 40,000 bednights.

World Rugby Chairman, Bill Beaumont, hailed the Women's Rugby World Cup as a "special and ground-breaking" tournament that broke records on and off the field. Both events achieved particularly strong numbers of out-of-state visitors with 56% for the Women's Rugby World Cup and 38% for the UEFA Women's Under 19 European Football Championships.

Results of international events supported by Tourism NI



Women's Rugby World Cup generated 40,000 bednights

Maximising Northern Ireland's Golf Tourism Potential

Delivering the Golf Tourism Strategy

Last year our work on the Golf Tourism Strategy helped deliver a 12% increase in golf tourism revenue to just under £40m from 123,200 golf visitors.



Revenue from golf tourism has increased to £40 million

We've been taking our golf offering into the international market with attendance at the PGA Merchandise Show in Florida (both 2017 and 2018), the North American Golf Tourism Convention in Florida (2017) and Oregon (2018) and the International Golf Travel Market (IGTM) in Cannes in 2017. We've attended the Rheingolf Fair in Dusseldorf and BMW PGA Championship at Wentworth in 2018. These markets are hugely valuable, generating nearly £30m of golf visitor spend in 2017 alone.

We have also attended the Dubai Duty Free Irish Open at Portstewart in 2017 and Ballyliffin in 2018, the IAGTO Golf Ireland Convention in Killarney in 2018, the NI Open



The Golf Channel's Matt Ginella films at Ardglass

at Galgorm Castle Golf Club in 2017 and 2018 and The 147th Open at Carnoustie in 2018 to promote Northern Ireland as a Made for Golf destination.

Tourism NI & Tourism Ireland have worked with the Golf Channel in the US to produce a TV ad featuring some of Northern Ireland's top links courses and Ginella's Journeys - a travel show with the popular presenter playing at Portstewart, Royal Portrush and Ardglass as well as visiting Titanic Belfast and The Old Bushmills Distillery.

The Dubai Duty Free Irish Open at Portstewart Golf Club in July 2017 was a great success. More than 92,000 spectators helped create a vibrant atmosphere in Portstewart and beyond.

This event made a major local impact, generated significant international media coverage and enhanced our reputation as a golfing and leisure destination.



Irish Open 2017 winner Jon Rahm

Future planning

The 148th Open, which takes place from 14th – 21st July 2019 at Royal Portrush, presents a major opportunity to showcase Northern Ireland on a local, national and international stage.

Tourism NI has been working in close partnership with key partners including the Royal and Ancient (R&A), Causeway Coast & Glens Borough Council, PSNI, Tourism Ireland and Royal Portrush Golf Club to ensure the delivery of a successful event that will bring an estimated economic benefit of more than £80m.



Dubai Duty Free Irish Open 2017 - Portstewart



25%
out-of-state
visitors



£4.2m

overall tourism
revenue generated
by spectators &
participants



23,389




bednights
generated






92,534

tickets sold



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