

# Building the Value of Tourism

TOURISM NI  
ANNUAL REVIEW  
2019



tourism  
northernireland

THE  
OPEN

THE  
OPEN



## A groundbreaking year

**Terence Brannigan**  
Tourism NI Chairman

Welcome to the Tourism NI Annual Review, which celebrates the achievements of another outstanding year for tourism in Northern Ireland. The hosting of The 148th Open at Royal Portrush alone made the last year a groundbreaking one for the tourism economy. 2019 was also marked by further positivity and a continuance of the upward trends that the industry has been enjoying over the past number of years.

The Open has raised our status as a golf destination and provides an unprecedented opportunity to showcase our exceptional golfing product, the Causeway Coast

and Glens and wider destination. In the build-up we significantly stepped up the promotion of our golf product by connecting with all those with an interest in the event – organisers, spectators, visitors, stakeholders, partners, businesses and residents alike. This included work to prepare the industry and volunteers to support delivery on the ground as well as the dressing and activation of Portrush and other hub towns and gateways into Northern Ireland.

Following The Open, our efforts quickly turned to completion of a new experience brand, Northern Ireland – Embrace A Giant Spirit. This was successfully launched to the world’s travel trade and media at World Travel Market in London in November and will communicate a high-quality experience to visitors that is distinctively Northern Irish. The brand will now be marketed on the island of Ireland and internationally by both Tourism NI and Tourism Ireland.



*John McGrillen, Tourism NI,  
Martin Ebert, Royal Portrush course architect,  
Johnnie Cole-Hamilton, the R&A, and  
John Bamber, Royal Portrush Golf Club*



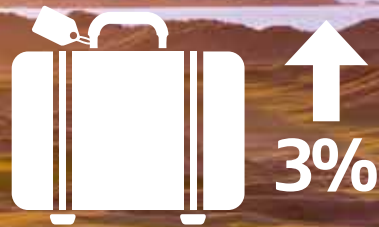
*Tourism NI and Tourism Ireland launched Northern Ireland - Embrace A Giant Spirit at World Travel Market in London in November with artist Colin Davidson, brand consultants and members of the local tourism industry*







**£968m**  
spend in 2018



**5m**  
trips in 2018



**1m**  
holiday visitors from outside NI in 2018



**£2.7m**  
spent on average  
per day IN 2018

Full-year figures for 2018, published in mid 2019, show another annual record, with increases in both trips and spend. 5m overnight trips were taken in NI in 2018, delivering £968m in visitor spend. External visitor spend reached £669m, a rise of 28% compared with £524m five years ago. An estimated 2.2 million hotel room nights were also sold in Northern Ireland, with hotel room occupancy reaching 70%.

Growth was evident right across the tourism industry, and with the staging of The 148th Open, it was distinctly visible in our golfing product. Progress was also evident in areas such as the Causeway Coast and Glens and Giant's Causeway, Titanic Belfast, Belfast in general, and screen tourism, especially in relation to Game of Thrones experiences and attractions.

In the past year we continued to capitalise on Belfast and the Causeway Coast being declared the number one region in the world to visit in Lonely Planet's Best in Travel 2018. Another fantastic international accolade was garnered when Northern Ireland was voted the world's Best Food Destination. This major boost, reflecting the hard work and talent of local artisans and producers, will be of great benefit for

the Taste the Island initiative as we seek to highlight the quality of Northern Irish produce and attract even more visitors from across the world.

Further highlights of the year were the announcements of city deals for Belfast and Derry~Londonderry. As both city deals contain strong tourism-led regeneration pillars, this co-investment from the UK government, local government, the universities and the private sector will deliver a step-change in Northern Ireland's economic and tourism fortunes over the next few years.

Tourism NI is ambitious to further grow and develop tourism and to raise standards still higher. While Brexit represents a significant and ongoing issue, we are confident that recent growth and developments in tourism place the industry in a strong position to meet and overcome the challenges ahead in 2020.

Terence Brannigan  
Tourism NI Chairman



Northern Ireland is awarded Best Food Destination for 2018/19



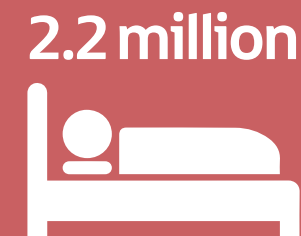
Game of Thrones helped to drive tourism trips and spend



spending by external  
visitors in 2018



spend by domestic visitors up 11%  
to **£299 million** in 2018



hotel rooms were sold  
in 2018



# Unprecedented golf tourism boost

Recent figures put the value of golf tourism at £42.6m – an increase of almost 60% since 2013. In 2018, golf tourism income grew to £42.6m. This year Northern Ireland experienced a further major boost to its status as a golf destination. The hosting of The 148th Open Championship presented an unprecedented opportunity to showcase our exceptional golfing product and the Causeway Coast and Glens.

In a busy year, we significantly stepped up the promotion of our golf product by connecting with all those with an interest in the event – organisers, spectators, visitors, stakeholders, partners, businesses and residents alike. This included work to prepare the industry and volunteers to support delivery on the ground as well as the dressing and activation of Portrush and other hub towns and gateways into Northern Ireland. All activity was backed by a comprehensive integrated marketing and communications plan to engage international visitors, media and people locally, underlining the event's economic and social significance to the whole of Northern Ireland and how far we have come as a tourism destination.

## Building the excitement

Our promotional campaign entered high gear with January's special red carpet 'Eyes on The Open' gala event at Titanic Belfast, which received a very warm response and excellent media coverage. This was followed by 'The Epic Journey', a highly successful community engagement programme that visited towns and cities across Northern Ireland and helped to build anticipation and excitement for the event. In the run-up to The Open, Tourism NI also hosted over 100 enthusiastic golf journalists and social

influencers, with a further 80 golf operators from the USA, Australia, New Zealand, Europe, the UK and Republic of Ireland attending in Championship week itself.

## Record-breaking

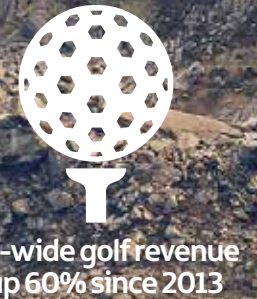
The 148th Open quickly became the fastest-selling event in the Championship's history, and with 237,000 spectators it broke more records as the best-attended Open outside of St Andrew's, the home of golf. In an electric atmosphere at Royal Portrush, all of the players, particularly Lowry, McIlroy, McDowell and Clarke, received phenomenal support from fans, while a number of international golfers made high-profile visits to the attractions on their doorstep along the Causeway Coast. Tiger Woods described the Royal Portrush golf course as "unbelievable" and praised the people of Northern Ireland as "so respectful" and "absolutely fantastic".

The Open generated £106 million of economic benefit for Northern Ireland, according to an independent study commissioned by The R&A and research commissioned by Tourism Northern Ireland. Total economic impact, new money entering the economy, was £45 million according to the study by Sheffield Hallam University's Sport Industry Research Centre. Northern Ireland also gained £37.3 million in destination marketing benefit from over 5,400 hours of global television coverage. An additional £23.7 million has been identified by Tourism Northern Ireland in Advertising Equivalent Value for Northern Ireland golf tourism monitored in other media coverage across the island of Ireland and internationally.

THE  
OPEN  
148<sup>th</sup> ROYAL PORTRUSH

14-21  
July 2019

Record-breaking, fastest-selling Open.  
Biggest-ever held outside St Andrew's.



Tourism NI's Epic Journey to The Open



Electric atmosphere at The Open



# Marketing the destination

## Marketing campaigns

Last year we supported 120 applications to promote Northern Ireland businesses in the Republic of Ireland. In addition, three compelling marketing campaigns – spring, summer and autumn – were delivered. Based on the previously successful ‘Say Hello to More’ catchline, the campaigns showcased the wide variety of things to see, do and experience on a short break. These campaigns resulted in 494,000 overnight trips, £1:£42 return on investment and £55m to the economy

In the Republic of Ireland our marketing intensified early in 2019 with a new campaign called ‘What’s Keeping You?’, in partnership with Irish comedian Neil Delamare. It included a week-long promotion with the Newstalk radio station. Among other activities, we ran a series of promotions for Game of Thrones experiences in the run-up to the official opening of GAME OF THRONES: The Touring Exhibition in Belfast.

Promoting Northern Ireland in Dublin



## International media

We hosted an extensive programme of media visits and live broadcasts generating £9.04 m in PR. Working with Tourism Ireland we also developed itineraries for and hosted 600 international media visits right across Northern Ireland.

## Overseas marketing support

In addition, we supported a number of overseas promotions in partnership with Tourism Ireland, with one highlight being a focus on the new visitor experiences continuing to emerge from the well-established Causeway Coastal Route cluster. In conjunction with Tourism Ireland and Derry & Strabane District Council we launched a campaign to promote the Causeway Coast and Northern Ireland in Germany, France, Spain, Italy, the Netherlands, Belgium and the Nordic countries.

Homepage takeover promoted in Italy with lastminute.com/volagratis



600



international media visits

£1:£42



return on investment from marketing

£55m



direct benefit from campaigns

Viaggio, Italy



Femme Actuelle, France



Say Hello to More campaign





# The benefits of national and international events

One of the success stories of our tourism offering is the ongoing programme of national and international events, which greatly enhance the experience visitors have of Northern Ireland. As well as developing the appeal and profile of specific areas, events bolster visitor numbers, encourage further spending and help elongate the tourism season. Last year we supported 43 national events, including the Cathedral Quarter Arts Festival, the NI Open and Derry Halloween, which dovetailed with the 400th anniversary celebrations of the completion of the construction of the City Walls.

We also supported a total of 43 national events. Spread across Northern Ireland, they created authentic reasons to visit and showcased our unique local character and culture to visitors. Highlights included the Balmoral Show, Garden Show Ireland, the Irish Game Fair, the Living History Festival, the Royal 13th Festival and the O'Neill Foyle Cup.

With a combined figure of 7.7 million spectators attending these events, the benefits delivered for Northern Ireland included an estimated 842,000 in bed nights and an average economic impact per event of £931,000. Providing an advertising equivalent value of £106m, the overall average return on investment was just over £24:£1.



**43**  
national events supported



**14**  
international events supported



**842,000**  
bednights



return on investment  
**£24:£1**



Armagh Georgian Festival



Award winning Halloween Festival in Derry~Londonderry



Belfast Mela



Belfast International Arts Festival



City of Derry Jazz and Big Band Festival

# The Game of Thrones effect

Northern Ireland's unique relationship with the biggest show in the history of TV continues to pay dividends for the tourism industry. Tourism NI estimates that because of Game of Thrones some 350,000, or one in six out of state leisure visitors, visit the real Westeros annually, spending in excess of £50m across the growing portfolio of related attractions and 26 publicly accessible film locations. To coincide with the final season, Tourism NI supported Tourism Ireland with the development of an experiential fan trail in Belfast. The colourful Glass of Thrones series of six stained-glass installations were unveiled in locations around the city week by week as Season 8 aired. Creatively inspired by fan search data, the windows depict key moments from the show and add further reasons to visit the home of the show.

## Touring exhibition

The arrival of the unique GAME OF THRONES: The Touring Exhibition to Belfast in April 2019 was also timed to coincide with the airing of the show's final season. Belfast was chosen as the destination for the premiere in April 2019, when cast and crew joined local industry and stakeholders for a star-studded red carpet event at The Waterfront Hall. With tickets on sale from the previous Christmas, partnership activity with Titanic Belfast Ltd and Tourism Ireland encouraged international visitors to experience the exhibition in the authentic 'Home of Thrones'.

## Game of Thrones legacy project

As Game of Thrones concluded filming after a decade in Northern Ireland, HBO announced plans for a formal studio tour of Linen Mill Studios. This attraction will feature not only the breathtaking sets, but will also exhibit displays of costumes, props, weapons, set decorations, art files, models, and other production materials. The Game of Thrones Studio Tour is scheduled to open in Banbridge in late 2020, giving more people more reasons to visit or extend their stay in Northern Ireland.



John McGrillen and Niall Gibbons launch the Glass of Thrones fan trail

## Annual Game of Thrones visitor estimates



The Game of Thrones Touring Exhibition opened in Belfast in April



# The business of tourism

## Thriving accommodation sector

One of the key growth areas for the tourism sector is hotel accommodation, and with over 3.7 million hotel guests accommodated, last year was a record for hotel demand in terms of room and bed sales. There was also welcome influx of new hotel developments, particularly in Belfast, although the increased overall capacity impacted on the total room and bed-space occupancy somewhat, which recorded some decreases. Guest houses, guest accommodation and B&Bs also delivered a strong performance, with increases in both occupancy and sales compared with the previous year. Additionally, almost 3.7 million bed-spaces were sold in hotels, guest houses, guest accommodation and B&Bs during January–September 2019, an increase of 7% on January–September 2018.

## International business tourism platforms

Last year we supported visits by a number of major associations and conferences with the potential to significantly boost Northern Ireland's profile as a meetings, incentive, conferences and event (MICE) destination.

## Meet the Buyer results 2019



## Meet the Buyer

Both the 2018 and 2019 Tourism NI Meet the Buyer workshops in Belfast exceeded all previous attendance figures. These major travel trade events feature a two-day agenda packed full of one-to-one appointments, networking with local tourism businesses and opportunities for travel trade operators to experience some of Northern Ireland's leading visitor attractions.

## International business conferences

A major coup in the business tourism marketplace was the hosting of the Conference and Incentive Travel (C&IT) Summit and Agency Forum, the flagship annual gathering for event professionals. Held outside London only once previously in its ten-year history, this conference was secured by a partnership of Tourism NI, Visit Belfast, ICC Belfast, Titanic Belfast and Hastings Hotels. Over 100 of the UK's top event planners and suppliers attended the event at ICC Belfast in July 2019.



The Conference & Incentive Travel Forum took place in Belfast for the first time





### Incoming Tour Operators Association

More than 30 global tour operators based in the Republic of Ireland came to Belfast in November for the Incoming Tour Operators Association's (ITOA) annual industry workshop and dinner hosted by Tourism NI.

This was the second consecutive year that ITOA held its flagship networking platform in Belfast, with over 100 Northern Ireland industry representatives in attendance. This event offers local industry the opportunity to market their product and experiences directly to Republic of Ireland tour operators who can then package and promote their business to over 4,000 global travel trade partners and customers.

### International business tourism

Tourism NI works in partnership with Fáilte Ireland to promote the island of Ireland as a MICE destination overseas under the Meet in Ireland brand. Under this marketing platform the Northern Ireland industry gains opportunities to reach global MICE buyers.

We led delegations to the major international business tourism platforms, including IMEX Frankfurt, IMEX US, IBTM

Barcelona and several GB platforms. These delegations involved more than 1000 sales appointments and generated leads worth approximately £27.42m.

### Dutch Association of Travel Agents and Tour Operators

200 Dutch travel professionals including travel agents, tour operators and group organisers, as well as travel journalists from the Netherlands and Belgium also visited in November for the annual congress of the Dutch Association of Travel Agents and Tour Operators (ANVR).

The annual conference is an important opportunity to present Northern Ireland as a holiday destination and a world-class business location to Dutch travel operators.



**£27.42m**  
worth of leads generated



**100+**  
UK's top event planners and suppliers



*The Travel Corporation chose Belfast as the location for its Global Sales Staff Conference for the first time*

Latest annual figures show that the island of Ireland welcomed a record 241,000 visitors from the Netherlands spending over €100m. Approximately 30,000 of these visitors included an overnight in Northern Ireland and spent almost £10m.

### The Travel Corporation

Sales teams from across the world were in Northern Ireland in August to visit key tourism attractions and experience the best in hospitality and entertainment as The Travel Corporation (TTC) chose Belfast as the location for its global sales staff conference for the first time. Founded almost 100 years ago, TTC is one of the world's leading travel companies with a portfolio of 42 multi-award-winning brands. It organises unique holiday experiences for 1.9 million travellers every year in more than

70 countries. 300 delegates travelled from the USA, Canada, Switzerland, Singapore, London, Australia and New Zealand. Representing well-known travel brands such as Trafalgar, Brendan Vacations, Insight Vacations, Contiki, Cost saver, and Luxury Gold, the main programme included visiting landmarks and attractions across Belfast as well as gala events at some of the city's most prestigious venues including the City Hall, St Anne's Cathedral and Titanic Belfast. The programme also included the Giant's Causeway, Titanic Belfast and street parties in Cathedral Quarter to experience local food, drink and nightlife.

# Supporting and inspiring the industry

## New products and attractions

From food and drink experiences and a collaborative initiative with The Arts Council of Northern Ireland, Embrace the Place, to ocean-view glamping pods and walking trails, inspirational new attractions, products, experiences and tours there were many exciting developments last year.

Those helping to meet the needs of visitors and enable Northern Ireland to compete on a global scale included the restored and reimagined Hillsborough Castle, the Northern Ireland residence of HM The Queen, which re-opened to the public in April 2019. Titanic Belfast also welcomed its five millionth visitor in 2018/19, a milestone reached following the attraction's busiest-ever period, which saw increased visitor numbers from international markets, including North America, mainland Europe and China.

The European Year of Cultural Heritage saw nine projects awarded funding through a £500,000 Culture and Heritage Fund available from Historic Environment Division, Tourism NI and the Heritage Lottery Fund. Two conferences and seminars were held with the heritage and arts sectors to explore how the creativity and partnership unlocked during the year could be developed into the future.

## Investment in digital technologies

For the second year running, Tourism NI launched a competition to inspire innovation in augmented reality (AR) from the local technology and tourism industries. This year the prize fund was increased to £200,000 in conjunction with partners Digital Catapult NI and the

Department for the Economy. Augmented reality has an innovative part to play as it begins to enhance real-world experiences and help make the visitor's journey more interactive, meaningful and seamless. It has the power to help visitors with smartphones and other digital devices navigate the destination in any language. It can plug the 'expectation gap' at sites of historic or cultural importance, by creating or recreating life via a digital layer over the physical environment. AR can also engage new audiences at tourist attractions via gamification, education and entertainment.

## Taste the Island collaboration

An exciting three-year collaborative initiative in partnership with Fáilte Ireland and Tourism Ireland was developed this year. Taste the Island will showcase Northern Ireland's food and drink and build on the highly successful Year of Food and Drink 2016 as well as the recent recognition of 'Best Food Destination' at the International Travel and Tourism Awards.

With the industry supported by regional roadshows, industry toolkits, information sessions and branding guidelines, the island-wide celebration will provide



Augmented reality making the visitor journey more interactive

domestic and international visitors with compelling reasons to visit Northern Ireland through the promotion of food festivals and events, high-quality local produce and authentic food and drink experiences. These special events were held throughout September, October and November 2019 and will be significant channel for promoting Northern Ireland's food renaissance going forward.

## Food and drink initiatives

The international reputation of our food and drink has grown considerably over the past few years. However, the food and drink space continues to offer many opportunities to develop both the seasonal and regional extension of tourism and to support our future strategic ambitions. Key highlights of our ongoing development and promotion of food-related initiatives last year included:

- Northern Ireland food and drink was showcased at London's Borough Market in partnership with Tourism Ireland, Invest NI and Food NI
- Supporting the Northern Ireland Hotels Federation's Taste of Tourism Summit
- Appointment of a Food Experience Development Officer to engage with food networks, food experience providers, local authority food representatives and Food NI and to act as our project manager for the forthcoming all-island season of food
- Support for BBC Good Food Show as part of the Hillsborough Castle Food Festival.



Taste the Island is an exciting three-year collaborative project between Tourism NI, Tourism Ireland and Fáilte Ireland



## Industry development

We continued to support businesses and individuals across the tourism and hospitality industry with programmes of sponsorship, workshops and masterclasses, sessions on the Republic of Ireland market opportunity, digital workshops and sales training to market-ready clusters.

## TED programme

One of the most significant industry development innovations was this year's new Tourism Enterprise Development (TED) programme, the content for which was based on research carried out by Ulster University and work with industry partners and key stakeholders. The programme included a number of very well-attended events that shed light on the key topics of attracting new visitors, digital development, investing in people, leadership and management, as well as product and experiences development. A masterclass in innovation and entrepreneurship showcasing international best practice was also delivered as part of the programme.

In 2018–19 Tourism NI delivered 42 industry support events within the Tourism Enterprise Development Programme to 1,796 participants with a strong focus on maximising the potential of the ROI market and a very successful Sales and Marketing Skills programme tailored for cluster groups. There was also an extensive engagement programme to prepare industry to maximise opportunities afforded by the hosting of The 148th Open Golf Championship in Portrush, including an additional 570 businesses across Northern Ireland trained in the WorldHost Golf Ambassador Programme.



World Host training was rolled out ahead of The Open

Another highlight included partnering with Belfast City Council, the Department for the Economy, the Department for Communities, Invest NI and the Northern Ireland Hotels Federation on a Tourism and Hospitality Careers and Jobs Fair. This event offered over 350 employment opportunities and highlighted the critical role all agencies have for engaging with directly with jobseekers.

To showcase the best of our local small visitor attractions, in conjunction with George Best Belfast City Airport and all 11 councils, we launched the search for Northern Ireland's Best Small Visitor Attraction. Belfast's Taste and Tour came out on top, winning £30,000 of free marketing support and brand visibility at the airport.



The Tourism Enterprise Development programme addresses gaps and opportunities

## TED programme results



1796

participants in the Tourism Enterprise Development programme



570

additional businesses received World Host training for The Open




42

industry support events delivered




Northern  
Ireland  
Embrace  
a Giant  
Spirit



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