Outdoors & Landscapes Insights

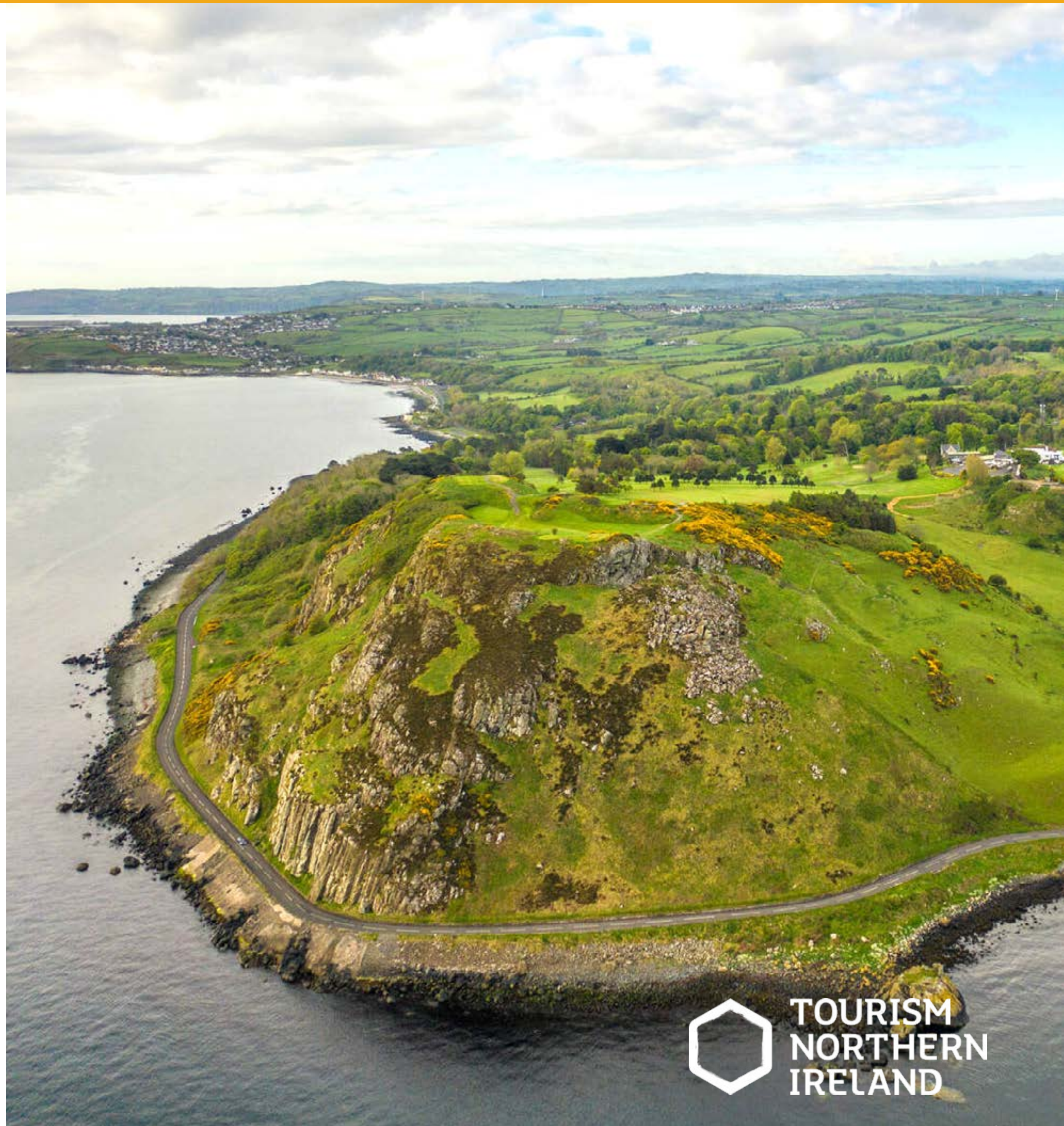
TOURISM NORTHERN IRELAND

Introduction and Overview

This report provides our tourism partners with access to the latest insights, trends and opportunities for outdoor based tourism. It outlines current international outdoor tourism trends and an overview of current activity and emerging opportunities to consider. An overview of our domestic and international visitors highlights what visitors are interested in from an outdoors and landscape perspective and how they are most likely to engage with our natural environment.

A series of opportunities for our tourism industry have been identified for consideration in how we develop the Outdoors experience across the destination. It includes a focus on a sustainable approach to optimising our natural heritage and exploring opportunities to introduce visitors to great outdoors and landscape experiences. A situational analysis has been undertaken to provide additional context for product development. This ensures we maximise our strengths, address key challenges and explore the many development opportunities that exist for Outdoors and Landscape based tourism across Northern Ireland.

For a broader market context, please visit Tourism Northern Ireland's Consumer Sentiment Report section https://www.tourismni.com/research-insights/consumer-sentiment-analysis/ - which features an in depth analysis on consumer confidence, propensity to travel and consumer concerns.



SECTION 1

Understanding Trends

International Trends influencing Outdoor and Landscape Experiences

- **Sustainability / Eco responsible** travel is now more of a priority for tourists and a key influence on the places they visit.
- **Digital** and **technology** adoption within outdoor experiences continues to grow from motivating visitors to consider new trails, share outdoor experiences with their peers to rating the quality of the outdoor product.
- **Health and wellness travel** is on the rise with more and more consumers seeking opportunities to recharge, self-develop, improve fitness and escape. The outdoors is increasingly the backdrop for the most sought after wellness experiences.
- The demand for **'Learn to'** experiences continues to grow with visitors taking the opportunity on holidays to sample something new in a different outdoor environment e.g. learn to kayak, coasteering.
- **Multi-generational travel** is growing and makes up between 33% and 40% of the total travel market looking for outdoor experiences to do together.
- There is an increased demand for **personalised travel** (regardless of budget). Consumers are seeking unique and 'one-off' experiences that can't be replicated.
- **Active ecotourism** is an emerging trend as consumers are becoming increasingly aware of their surroundings and are also seeking active/fitness focused ecotourism experiences. This has become more common amongst the 'baby boomer' generation who are also willing to spend more money on such experiences.
- Consumers are continuing to **'Work from Anywhere'** boosting the year round demand for outdoor activity.

International Trends influencing Outdoor and Landscape Experiences

- **Blended Outdoor / culture events & festivals**: Niche outdoor events combined with culture and entertainment elements are returning in popularity as key motivations to explore new destinations.
- **Local Experiences – "Localhood"**: A significant proportion of visitors are increasingly seeking authentic community and 'meet the local' type experiences. Tourists want to engage with and participate in local culture from enjoying local cuisine to celebrating regional festivals and holidays.
- **Cycling**: There is continued growth in participation in cycling with increasing preference for off road exploration including Greenways, trails and mountain biking.
- **Growth in E-bike activity participation**: The global demand for E-bikes offer a sustainable and accessible option for all ages an stages of life to explore more of the destination.
- **Multi-activity soft adventures**: There is a steady growth in demand among many visitors to combine multiple activities as part of their visit (e.g. wild yoga and kayaking; hiking, kayaking and dining along a coastal route)
- **Increased participation in walking and exploration of trails**: National and international growth in exploring destination through short looped trails to long distance routes and ways.
- **Wildlife watching**: Post-pandemic there is a greater appreciation of the outdoors, nature and wildlife. A growing number of visitors are looking for experiences that allow them experiences animals and marine life in their natural rural and coastal environs e.g. dolphin watching, bird watching.
- **Water-based activities**: Increased participation in water based activities such as kayaking, canoeing and windsurfing.
- **Slow Adventure and Outdoors**: More and more people are seeking trips that include soft adventure and recreational activities as a way of exploring the local area. Slow adventure brings visitors on immersive journeys through natural spaces encouraging people to experience the outdoors at a slower pace and integrates a range of experiences to include local food, culture and history.
- **Off road trails are influencing visitor exploration**: An increased number of visitors are looking for more waymarked exploration of local areas brining them on safe off road trails and on well maintained routes with access to adequately spaced services along the route.

https://www.tourismni.com/business-guidance/sector/activities-attractions/activities-and-attractions-trends-and-opportunities/trends-in-the-outdoors/
https://learn.adventuretravel.biz/research/2022-adventure-travel-industry-snapshot
https://www.traveldailymedia.com/7-significant-travel-trends-to-expect-in-2023/
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https://www.traveldailymedia.com/top-10-travel-trends-for-2023-adventure-purpose-nostalgia-and-extreme-immersion-experiences/
https://www.expedia.com/see/2023traveltrends-expedia

OUTDOORS & LANDSCAPE
Visitor Demand & Motivations

Trending High-Demand Trips

- Custom Itineraries
- Greener/Sustainable/Low Impact Itineraries
- Slow Travel Itineraries
- Domestic/Regional Travel
- Expert or Specialist-Guided Trips
- Remote Destinations/Trails
- Wellness and Mindfulness Itineraries
- Diversity-Equity-Inclusion / Cultural Heritage Tours
- Electric Bike Itineraries
- Family/Multi-Generation

Trending Motivations

- New Experiences
- Go Off the Beaten Track
- To Travel Like a Local
- Cultural Encounters
- Wellness/Betterment Goals
- Cultural
- Adventure Travel as a Status Symbol
- Pampering and Luxury
- Digital Detox (Unplug)
- Bleisure/Workation

Trending Activities

- Cycling (electric bikes)
- Hiking/Trekking/Walking
- Wildlife viewing / Safaris
- Culinary/Gastronomy
- Wellness-focused activities
- Cultural activities
- Cycling (mountain/non-paved surface)
- Photography (wildlife/nature)
- Cycling (road/paved surface)

Most Important Reasons for Visiting NI	%
To visit a specific attraction	30%
To see beautiful scenery / landscapes	21%
To explore the history and culture of Northern Ireland	13%
To visit friends or relatives	9%
To see a particular city/town/village	5%
Have been to Northern Ireland before and want to return	5%
Some other reason	16%

Things Seen and Done	%
Visited a castle/other historic monument	45%
Visited a forest, park or garden	44%
Visited a pub	38%
Visited a museum or art gallery	32%
Went shopping	27%
Visited a beach	24%
Visited a visitor/interpretation centre	24%
Took a guided tour	23%

Product Development Considerations – Applying the Blueway Experience

Outdoor Activities – What Visitors Want:

- Fun and adventure by boot, boat or bike on and alongside scenic waterways.
- Kayaking or cycling to the nearest towns for a dining experience.
- Hiking loops through forests, hills or shorelines with river views.
- Combined complementary experiences – Through cooperation across a network of local businesses – food and beverage providers, attractions, accommodation and activity operators all working together to make their area an exciting and attractive destination for visitors.

Target Audience – "Dabblers":

- Dabblers are enthusiastic but they're not experts. They want fun and enjoyable experiences rather than challenging ones.
- The activity isn't the focus of their holiday. Instead, it's a means of experiencing and exploring the destination.
- The supporting experiences that are available play a much more significant role in the choice of destination than the activity alone.

The Blueway Example – What Visitors Want

- **Under 30's**: Blueway experiences and activities are among the many options open to this free and easy group. Generally speaking, Blueways appeal more to domestic visitors aged under 30 than international visitors.
- **Younger Families**: While some activities in and around water will appeal to this group, managing small children around water creates challenges.
- **Older Families**: For families with kids in their early teens, Blueways area godsend. They offer excitement, new experiences and surroundings – and the chance to spend time together as a family, away from screens.
- **Adults 55+**: People with more time and fewer responsibilities are especially enthusiastic about Blueways. They can set their own pace, explore and enjoy a wide variety of experiences – and if they're feeling daring, they can dial up the excitement levels.

Adopted from Blueways Ireland Analysis

Additional Report Sources

https://www.tourismni.com/business-guidance/sector/activities-attractions/activities-and-attractions-trends-and-opportunities/trends-in-the-outdoors/

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https://www.traveldailymedia.com/top-10-travel-trends-for-2023-adventure-purpose-nostalgia-and-extreme-immersion-experiences/

https://www.expedia.com/see/2023traveltrends-expedia

SECTION 2

Understanding the Visitor

Outdoor and Landscape – Domestic Market Segments

Category	%	Estimated Annual Spend	Demographics
Aspiring Families	30%	£1,360	Most likely 35-44, even social class split, have younger children (under 16).
Social Instagrammers	15%	£1,006	Youngest segment with 29% aged 18-24yrs and 26% aged 25-34yrs. Least likely to have children.
Natural Quality Seekers	15%	£1,238	Older (av. age 55) more likely to be male, older kids.
Short Break Enthusiasts	14%	£1,020	Even gender split, older (av. age 54), even social class split.
Pragmatists	13%	£964	Female bias, older (av. age 45), older children, even social class split
Comfort Seekers	13%	£822	Older, more female, older kids 16+

Domestic Market:

- Preference for gentle activities
- Like clear itineraries, enjoying the process of planning their trip
- Looking to take time out and enjoy a break from routine life
- 7 in 10 of adults in Northern Ireland visit the outdoors for leisure every week
- 61% of adults walk for less than 2miles or less than 1 hour
- 34% of adults in Northern Ireland are now more adventurous compared to pre-pandemic
- More families and young people visit 'elemental' outdoor areas such as coastal paths and the Mourne Mountains

- Natural Quality Seekers are most aligned with the outdoors and landscape. They are nature lovers and enjoy spending time outdoors. They have is a preference for gentle activities. As a segment they like clear itineraries, enjoying the process of planning their trip.
- Activities are very important to Aspiring Families with a requirement for activities to suit children and the whole family.
- Comfort Seekers are interested in sustainability and caring for the environment. They also love nature, culture and enjoy engaging locals.

Outdoor and Landscape Market Segments – ROI Segments

33% Active Maximisers:

- Youngest segment although significant number (57%) will have young children.
- Like to have planned and packed itinerary.
- Looking for a great destination and will plan around that.
- Looking for energetic experiences, unpredictability.
- Seeking night life, buzz but also romantic destinations.
- Active on social media and like to share holiday online.

20% Culture and Connections Seekers:

- Most likely segment to be interested in arts, culture and food.
- Motivated by the opportunity to spend time with family or friends on short breaks.
- Although older still motivated by energetic and outdoor activities.
- Older segment - more likely to be thinking about safety (personal and health) than other segments - need reassurance.

15% Open-minded Explorers:

- Interested in the natural environment, scenic attractions.
- Motivated by culture and are seeking unique experiences.
- Food very important and highly motivating for them.
- Want high quality accommodation.
- Older segment - concerned about their personal safety and health.
- Want good value for money.

13% Open-Minded Families

- Motivated by natural environment, scenic attractions.
- More likely to stay in a variety of different accommodation types.
- Motivated by history and culture and are seeking unique experiences.
- Looking for a variety of activities to suit all members of the family.
- Interested in gentle/relaxing outdoor activities.

11% Indulgent Relaxers:

- Most likely segment to take a ‘romantic’ break as their next break.
- Motivated by the opportunity to spend time with family or friends on short breaks.
- Prefer to stay in large comfortable hotels.
- Like to ‘indulge’ themselves when on a break.
- Enjoy good food and music.
- Interested in shopping opportunities while on a short break.

8% Good Time Families

- Interested in a variety of things - seeking to get the best from their breaks.
- Want to enjoy good food and drink.
- Like to interact with locals.
- More likely to take multi-generational breaks.
- Like to research their trips thoroughly and uncover hidden gems.
- Bigger spenders but focused on getting a good deal.

Outdoor and Landscape Segments – International Segments

Culturally Curious:

Attitudes and Drivers –

- Want to broaden their minds, explore new culture, landscapes and history
- Enjoy and explore the natural environment
- Be active in the landscape through walking and cycling
- Connected to the issues of the environment
- Looking for out of the ordinary travel experiences
- Health conscious, staying active and eating healthily

Great Escapers:

Attitudes and Drivers –

- Want to go home recharged and invigorated
- Looking to connect and immerse with nature and experience natural beauty
- Spending time together enjoying new experiences and reconnect
- Majority of their holiday is spent in a rural area
- Being active and participating in outdoor activities

Social Energisers:

Attitudes and Drivers –

- Passion to experience new things
- Unique and exciting experiences
- Must-see and must-do peri urban experiences

International Markets – Outdoor and Landscape Behaviour

Great Britain Market:

- Comprise **65%** of the overseas market to Northern Ireland.
- **33%** of British holidaymakers took part in activities
- **28%** visited National Parks and forests while in Northern Ireland
- The British market looks for easily accessible countryside rich experiences
- Iconic coastal scenery and dramatic green landscapes are appealing
- Experiences perceived as taking a long time are not attractive to the typical short break
- Preference for easy activity at a relaxed pace. Walking is the preferred way to sightsee.
- Activities on or near water such as boat trips and coastal walks are popular

US Market:

- The US holidaymaker prefers to explore and engage with the landscape in a an easy way
- Easy walking is the favourite way to sightsee
- Unspoilt landscapes such as iconic coastal scenery and dramatic green nature can act as a differentiator for the US market.
- Scenic boat tours are particularly appealing to the US audience, especially those offering a short experience of the coast
- Americans prefer experiences of short duration to fit in as much as possible to their itinerary

French Market:

- Looking to recharge and destress on holiday, experiencing new destinations
- The market is not overly active on holiday, with activities preferred at a relaxed pace
- They look to get off the beaten track and are seeking a sense of freedom that can be gained in quiet, unspoilt landscapes
- Iconic coastal scenery and lush green landscapes are of appeal
- Inland and coastal waters are attractive to the French market with boat trips providing new perspectives and easy sightseeing

German Market:

- The German market is more active than others and not intimidated by extended activity.
- Being active is central to how they engage and immerse themselves in nature. They are generally well prepared for exploration.
- Coastal areas and dramatic seascape views are attractive to the market consumed through walking or boat trips.
- The opportunity to watch marine life is a key differentiator – an experience with limited opportunities at home.
- Iconic historic sites when positioned in landscape off the most appeal to Germans

	Great Britain	United States	Germany	France
Opportunity	**2019:** 4.8M tourists 1.7M holidaymakers. 1.5M tourists included NI	**2019:** 1.7M tourists 1.3M holidaymakers. 212,000 tourists included NI	**2019:** 749,000 tourists 509,000 holidaymakers. 65,000 tourists included NI	**2019:** 557,000 tourists 347,000 holidaymakers 55,000 tourists included NI
Revenue	**Tourist:** €1.4bn/£1.3bn **Average:** €302/£263 per Tourist **Average spend while in NI:** £305	**Tourist:** €1.6bn/£1.4bn **Average:** €916/£797 per Tourist **Average spend while in NI:** £166	**Tourist:** €459M/£399M **Average:** €613/£533 per Tourist	**Tourist:** €283m/£246m **Average:** €508/£442 per Tourist **Average spend while in NI:** £161
Length of Stay	**Tourists:** 4.7 nights **Holidaymakers:** 4.3 nights **NI:** Average of 3.2 nights	**Tourists:** 8 nights **Holidaymakers:** 7 nights **NI:** Average of 2.4 nights	**Tourists:** 8.6 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.5 nights	**Tourists:** 9.9 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.1 nights
Reason for visiting	36% Holiday, 46% VFR, 17% business, 1% other	73% Holiday, 17% VFR, 6% business, 4% other	68% Holiday 16% VFR 11% business 5% other	62% Holiday 18% VFR 12% business 8% other
Activities	The British are active holidaymakers: **70%** sites of historical interest, **70%** engaged in pastimes/events, **33%** participated in activities.	American Holidaymakers are active tourists: **96%** sites of historical interest, **90%** engaged in pastimes/events **44%** participated in activities.	Germans are active tourists and hiking/cross-country walking is their most popular activity **92%** sites of historical interest, **83%** engaged in pastimes/events **58%** participated in activities.	French are active tourists and enjoy exploring historical sites and engaging in multiple events and activities while on the island of Ireland. **89%** sites of historical interest, **93%** engaged in pastimes/events **52%** participated in activities.
Travel Trends	31% visit July – September 20% Jan – Mar 27% Apr – Jun 21% Oct – Dec 23% visit NI	543,000 Rent a Car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 17% Oct- Dec 10% visit NI	169,000 rent a car 42,000 bring a car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 16% Oct- Dec	66% rent a car 30% bring car on ferry 34% visit July – September 18% Jan – Mar 30% Apr – Jun 17% Oct- Dec
Planning	WoM is the most powerful influence 71% of GB holidaymakers planned their trip via the internet 12% using guidebooks	48% were inspired to visit by word of mouth 74% of American holidaymakers planned their trip via the internet 25% using guidebooks	Almost 50% were inspired to visit by word of mouth 70% of German holidaymakers planned their trip via the internet 35% using guidebooks	53% were inspired to visit by word of mouth 66% of French holidaymakers planned their trip via the internet 41% using guidebooks
Demographic Profile	39% yrs 25-44yrs, 18% under 24yrs, 43% over 45yrs, 79% ABC1	39% 55yrs+ 20% 35 - 54yrs 42% couples 92% ABC1	50%+ under 35yrs 33% under 25yrs 43% couples 90% ABC1	50%+ under 35yrs 36% couples 92% ABC1
Accommodation	Paid Accommodation - predominantly hotels. 50% spent with Family & Friends	Paid Accommodation - predominantly hotels.	Hotels, B&B's, Guesthouses	Rented Accommodation Hotels Guesthouses/B&B's
Core Segments	19% Culturally Curious (4.4M) 23% Social Energisers (2.7M)	32% Culturally Curious (11.5M) 22% Social Energisers (12.9M)	49% Culturally Curious(9.1M) 10% Social Energisers (2.4M) 24% Great Escapers(7.9M)	51% Culturally Curious(6.2M) 14% Social Energisers (1.9M) Great Escapers (2.5M)

Understanding International Visitors for Cycling & Walking

Understanding the Cycling visitor

Like all holidaymakers, the majority of cyclists are interested in visiting a destination for the beauty and landscape and wanting to explore a destination. What differentiates the needs of cyclists from other holidaymakers is their need to be physically healthier and feeling connected to nature. They have a greater need to socialise with other tourists/locals, watch a sporting event or other laid on entertainment quality food and drink.

- 85% want to relax and unwind
- 82% want quality time with loved ones
- 79% are seeking outdoor activities
- 78% are seeking good value for money
- 77% want to be Covid-19 secure

Cycling Profile:

- In 2019, 211,000 of the 361,000 overseas tourists who cycled during their trip to the island of Ireland were holidaymakers
- Holidaymakers who cycled on the island of Ireland stayed longer, spent more and were more likely to visit the regions and Northern Ireland than the average holidaymaker
- The average spend of cyclists was €849, more than the average of all holidaymakers (€577)
- The average stay of cyclists was 10 nights
- 17% stay at least one night in Northern Ireland
- 76% holidayed between April-September

Understanding the Walking visitor

Like all holidaymakers, the majority of walkers/hikers are most interested in visiting a destination for the beauty and landscape. Walkers (particularly hikers) over index on everything, but especially on ‘feeling connected to nature’ and ‘being physically healthier while abroad.

- 87% want to relax and unwind
- 81% are seeking good value for money
- 80% want to spend quality time with loved ones
- 75% want to be Covid-19 secure
- 70% are seeking lots to see and do

Walking Profile:

- One-third of holidaymakers did a hike/cross-country walk during their trip to the island of Ireland in 2019, making it the most popular physical outdoor activity among overseas visitors
- Holidaymakers who hiked on the island of Ireland stayed longer, spent more and were more likely to visit the regions and Northern Ireland than those who didn’t hike
- The average spend of hikers was €704, more than the average non-hiker (€530)
- The average length of stay of hikers was 8 nights
- 16% stayed at least in one night in Northern Ireland
- 72% holidayed between April-September

SECTION 3

Opportunities to Consider

Building on what visitors are looking for

What Visitors Want	Key Experiences	Delivering the Experience
Touring, particularly coastal routes, connecting places of interest and things to see and do	Driving routes through charming seaside towns or historic villages with iconic scenery and lots of interesting places to explore at their own pace along the way offering stunning scenery, to savour the natural beauty, wildlife and biodiversity.	Provide a diverse range of things to see and do, preferably with an iconic attraction to serve as a focal point for the journey and point of differentiation. A connecting theme can help orientate/position the visitor in the destination and provide a sense of place. Distance to travel is not necessarily a barrier, but visitors need to know how to navigate the route and find the key experiences along the way.
Immerse themselves in landscape and nature	Experiences that offer immersion in the landscape and coast. Unobstructed, unspoilt, breath-taking views then getting off the beaten track for a different perspective of the biodiversity and nature that surrounds them.	Experiences with the landscape, particularly the coast, at their heart, generate the broadest appeal. Provide a different viewpoint on nature that are multi-sensory, surprising and memorable (eg from a high vantage point), to feel totally immersed in nature (eg on an island sleeping beneath the stars). The promise of engaging with wildlife/marine life particularly appeals.
Self-discovery, un-plugging from the urban/ digital world	Seeking difference from their daily lives through new landscapes, food, activities and people.	Offer relaxation and a chance to unwind, provide opportunities for cultural discovery or chance to learn a new skill from the locals. Engage the senses and offer the chance to learn a new skills or do things which they can't do at home and make them unique.
Spending time being active outdoors	Looking for freedom and invigoration in the outdoors and chance to realise their sense of adventure through land and water based activities such as walking, cycling or kayaking, or challenge themselves participating in more high octane activity. Opportunity for self discovery, trying something new/learning a new skill or something to brag about when they get home.	Challenging activities tend to be quite niche in appeal, but can attract enthusiasts by offering a unique or different experience. Offering a range of experiences aimed at different experience levels can broaden appeal e.g. guided boat trip for spectacular views from the sea rather than a vertical climb for stunning views from the top. Even the most active adventure seeker can be put off by very long walking trails. Take opportunities to be creative and add a twist to each activity such as yoga on a cliff top, a food trail by bike or canoe trips with a picnic on an island.
Spending time exploring the Northern Irish countryside	Relaxed, scenic walking trails with opportunities to learn about the local culture and history. Explore the frequent diversions along the way for example ancient castles and ruins or historical buildings and discover their local stories. Stopping off or staying in quaint towns and villages to find a cosy B&B or farmhouse for the night and share a story or a song or two with the locals in the pub.	Not everyone likes to be too remote, while others are happy to delve into the depth of Northern Ireland's countryside. While the landscape is at the heart of these walks, they need to be enhanced by offers of cultural discovery, with the potential for a theme to add appeal. Appeal broadens if walks are not too long and do not cover difficult terrain. While needing to be clearly waymarked, trails should preferably be natural, not overly managed, providing the freedom to explore the natural countryside.

Opportunities to Consider

- **Developing Water Based Experiences**: Grow the volume of water based activities to enable the visitor to sustainably engage with the rivers, loughs and lakes.
- **Dedicated Outdoor Activity Facilities**: Develop dedicated trail head facilities to grow experience provision at trail heads and focal points for activity cluster growth.
- **Greenways**: Develop an expanded network of Greenways and cycleways across the destination taking into consideration linkages with cross border products to add additional scale and distance.
- **Off Road Cycling**: Develop the off road cycling growth opportunity through the enhancement of trail heads and centres of excellence with increased e-bike availability and access to trails that cater for all levels of interests and proficiency.
- **Themed Looped Walks**: Development of themed short looped walks in urban and rural locations to engage with local heritage attractions, wildlife and nature sites.
- **Long Distance Trails**: Expand the range of things to do and see linked to established long distance walking trails and create iconic walking trails experiences.
- **Coastal Tourism Activity Centres of Excellence**: Develop niche coastal tourism centres of excellence to grow demand for coastal based experiences, on land and on water e.g. sea life watching, sea angling, boat excursions.
- **Product & Experience Centres - Cycling Destinations**: Develop outdoor product experience centres around existing cycling infrastructure and trails networks to attract special interest visitors.
- **Lighthouses & Activity:** Develop activity focused trail heads at lighthouses (e.g. St John’s Point) creating the opportunity to develop activity hubs and trail heads to established coastal locations.
- **Technology & Data**: Build on growing outdoor activity trends that incorporate technology into outdoor activities featuring apps to support route sharing, local route highlights and exchanging of experiences between visitors.
- **‘Learn to’ Experience**: Expand the level of ‘learn to’ experiences set in epic rural and coastal landscapes aligned with demand for immersive learning experiences among Gen Z and Millennial audiences.
- **Bookable Activity Experiences**: Develop outdoor activity providers digital platform capacity to grow the facility for online booking and developing customizable activity experiences.
- **Wellness and Wellbeing**: Build on international demand for bespoke wellness breaks and retreats incorporating soft activities and experiences delivered intriguing landscapes and venues e.g. forest yoga, cliff walk meditation.
- **Luxury Experiences**: Develop luxury personalised outdoors experiences catering for smaller groups and demand for bespoke ‘one-off’ unique experiences sought by visitors.
- **Eco-Tourism Experiences**: Grow the number of eco-tourism themed activity experiences delivered against the backdrop of epic woodlands, mountains, coast, rivers and lakes.

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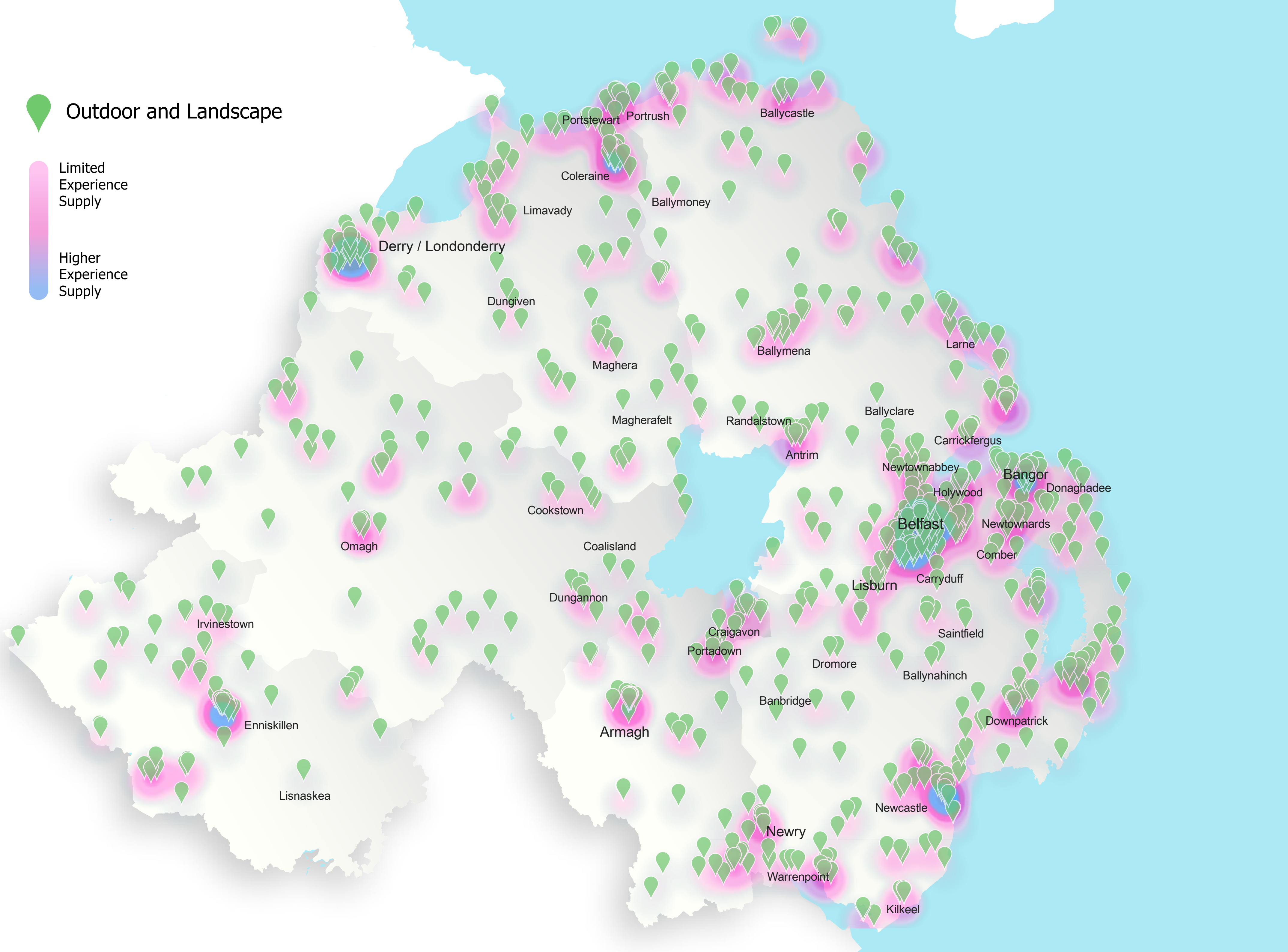
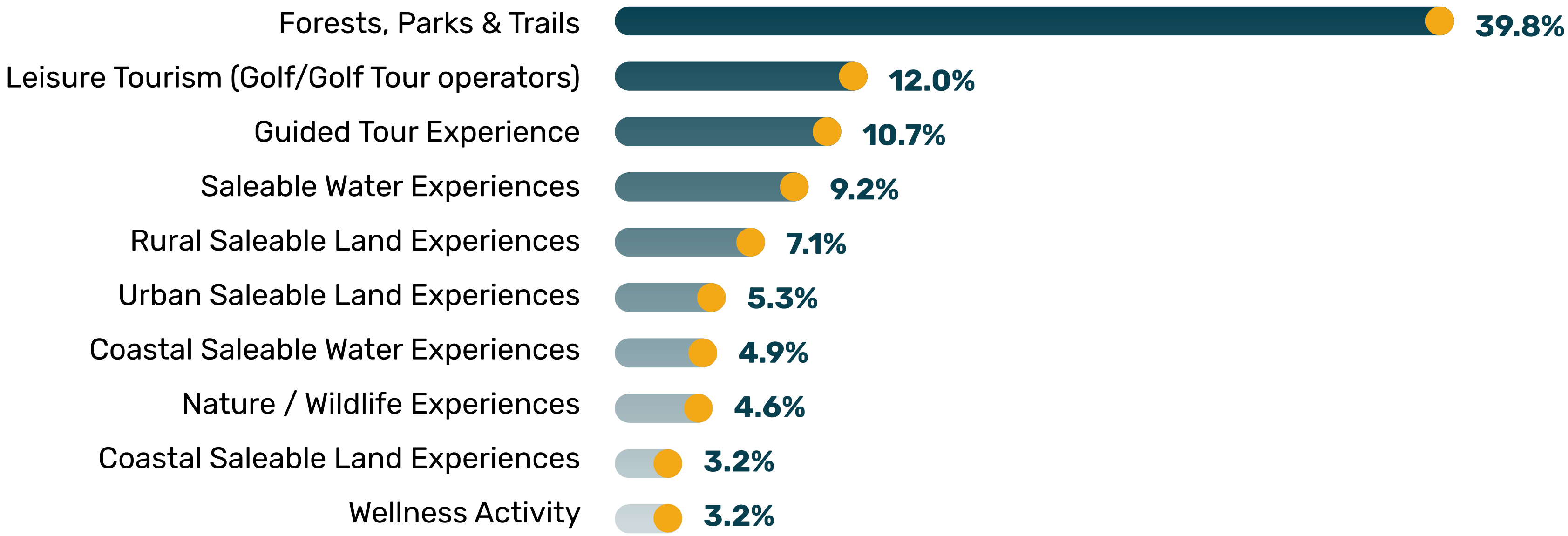
Situational Analysis – Outdoor & Landscape

TOURISM NORTHERN IRELAND

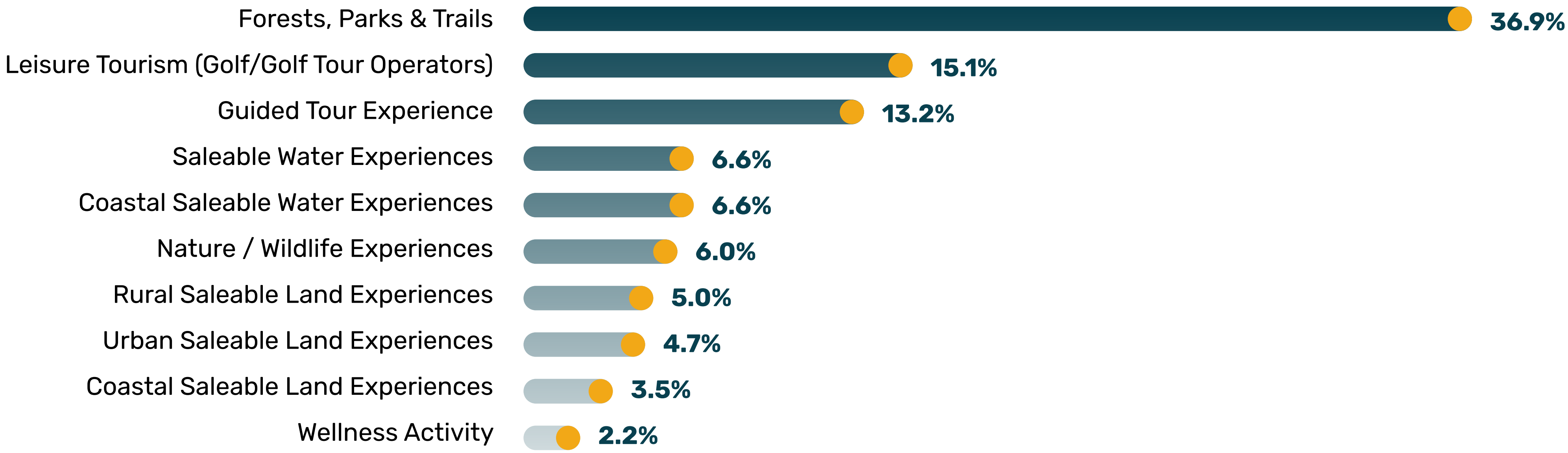

Outdoor and Landscape
Limited Experience Supply
Higher Experience Supply
Ballycastle
Portstewart
Portrush
Coleraine
Ballymoney
Limavady
Derry / Londonderry
Dungiven
Maghera
Ballymena
Larne
Magherafelt
Randalstown
Ballyclare
Antrim
Carrickfergus
Newtownabbey
Bangor
Donaghadee
Holywood
Belfast
Newtownards
Cookstown
Omagh
Coalisland
Comber
Lisburn
Carryduff
Dungannon
Irvinestown
Craigavon
Portadown
Saintfield
Dromore
Ballynahinch
Banbridge
Downpatrick
Enniskillen
Armagh
Lisnaskea
Newcastle
Newry
Warrenpoint
Kilkeel

County	Percentage of overall Outdoor and Landscape Products in NI	Number of Outdoor and Landscape Experiences	Strongest Product Category
Antrim	33.10%	317	(1) Forests/ Parks/Trails (2) Golf
Down	28.00%	269	(1) Forests/ Parks/Trails (2) Golf
Derry/ Londonderry	15.90%	153	(1) Forests/ Parks/Trails (2) Guided tours
Fermanagh	9.40%	90	(1) Forests/ Parks/Trails (2) Saleable water experiences
Armagh	7.00%	67	(1) Forests/ Parks/Trails (2) Rural saleable land experiences
Tyrone	6.60%	64	(1) Forests/ Parks/Trails (2) Rural saleable land experiences
Total		961	

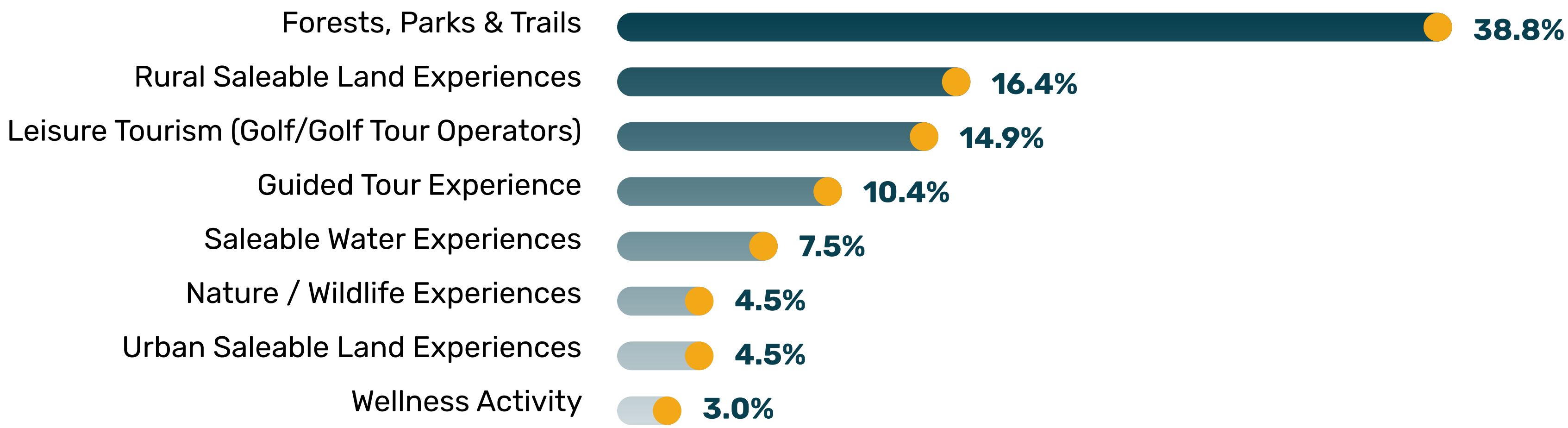
Outdoor & Landscape Cluster Map Summary



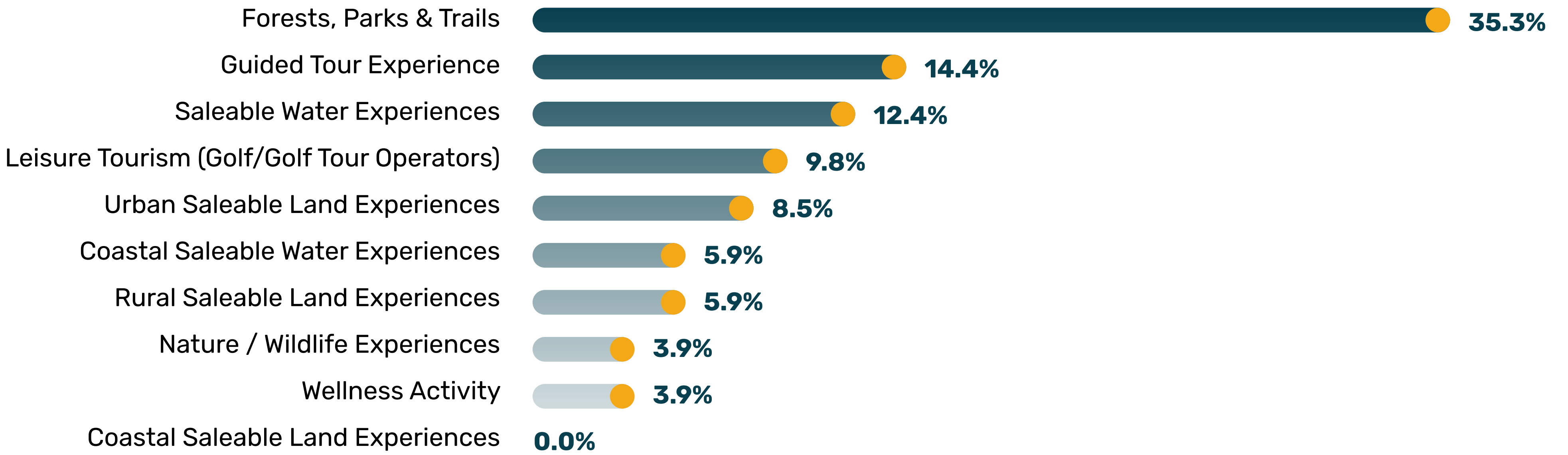
Antrim • Total Experiences = 317



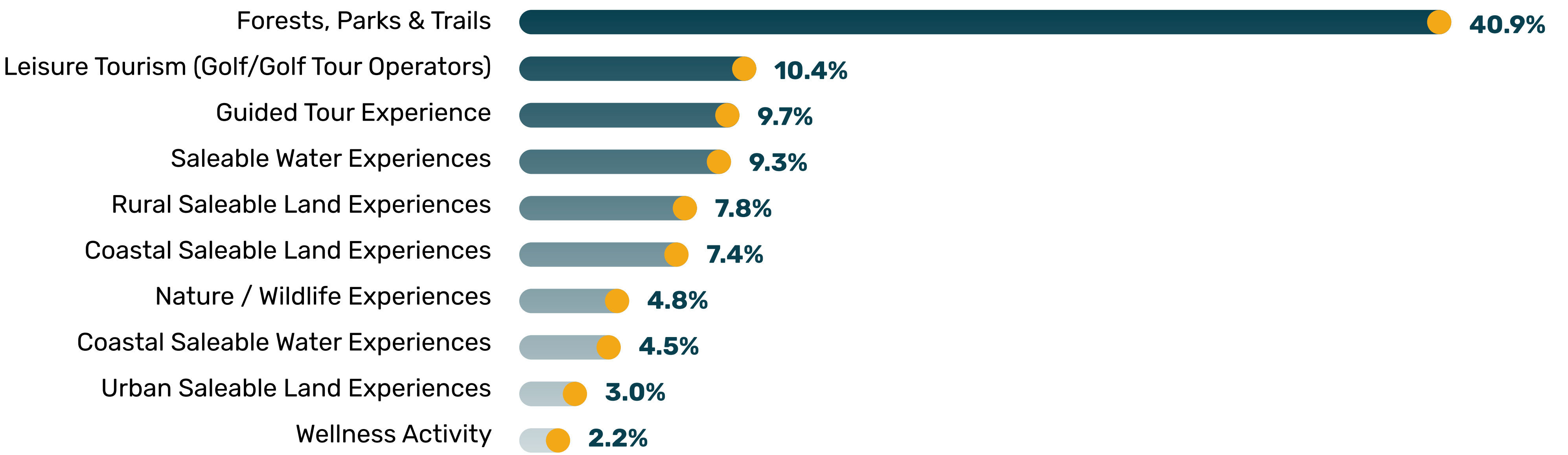
Armagh • Total Experiences = 67



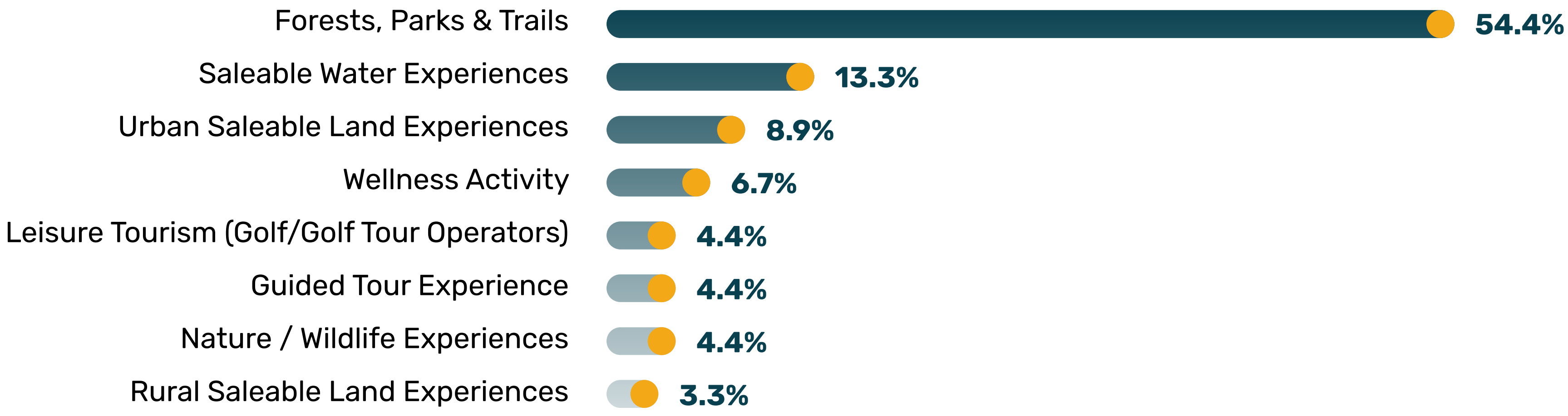
Derry/Londonderry • Total Experiences = 153



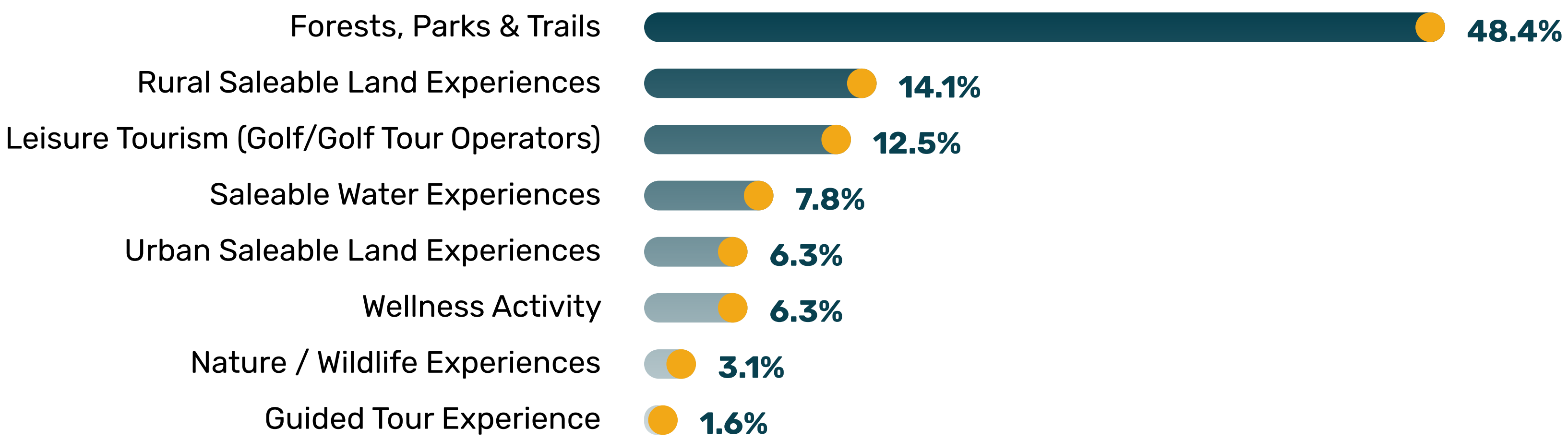
Down • Total Experiences = 269



Fermanagh • Total Experiences = 90



Tyrone • Total Experiences = 64



SECTION 4

Building on our **Strengths**

- **UNESCO Sites**: Internationally recognised landscapes such as the Giants Causeway and Cuilcagh Lakelands Global Geopark
- **Investment in Success**: International appeal of locations where iconic experiences have evolved through strategic investment e.g. the Gobbins Cliff Walk, Cuilcagh 'Stairway to Heaven' Boardwalk.
- **Areas of Outstanding Natural Beauty**: Readily accessible Areas of Outstanding Natural Beauty from coastal areas to rural areas such as the Sperrins.
- **Existing coastal activity clusters**: Established coastal activity clusters along the Causeway Coast offering soft and hard adventure linking Belfast, Ballycastle, Portrush, Portstewart and Derry/Londonderry.
- **Lakeland activity**: Ease of access to slow water-based adventure hubs across the Loughs and Lakes of the destination.
- **Hill Walking and Mountain Experiences**: Appeal and accessibility of iconic hill walking and mountain experiences throughout the destination.
- **Ease of Access**: Readily accessible outdoor recreation activities directly from core accommodation hubs in urban areas.
- **Trails Accessibility**: Extensive range of trails of varying length and difficulty catering for a broad age profile and level of interests from enthusiast to dabblers.
- **Long Distance Trails and Routes**: Range and variety of long distance walking and cycling routes options linked to iconic destinations and stories e.g St Patrick's Way, EuroVelo, Mourne Mountains, Strangford Lough.

- **Looped Trails**: Extensive network of short looped trails (2hrs or less) enabling visitor exploration of the local destination.
- **Forest and Woodlands**: Strong woodland and forest park product base distributed across the country.
- **Golf Product**: Home to globally recognised world class Links golf courses supported by a wider quality golf product cross the country
- **Off Road Cycling**: Variety and quality of off road cycling hubs accommodating an increasing demand for off road cycling experiences.
- **Water activity trails**: Existence of product specific trails such as Erne Canoe Trails encouraging exploration of the Lakes product and slow tourism experiences.
- **Multigenerational Experiences**: Mix of outdoor experiences that cater for multigenerational group travel and demand among older travellers looking to experience soft outdoor adventure
- **Outdoor urban activity**: Range of activity on the periphery of Belfast allowing the urban visitor to engage with the outdoors
- **Film Locations**: Access to internationally recognised film and television landscapes across the destination
- **Innovative Outdoor Experiences**: Visitor access to unique outdoor experiences e.g. night time exploration of Cave Hill.
- **Niche Experiences**: Diversity of outdoor product that caters for emerging niche experiences e.g. wellbeing experiences, forest bathing, dark skies
- **International Events**: Capacity to host international events aligned with varied landscapes and products such as Giro d'Italia, Red Bull events, Mourne International Walking Festival.

TOURISM NORTHERN IRELAND

SECTION 5

Addressing our **Weaknesses**

- **Rural Experience Supply:** Limited scale of experiences developed away from coastal routes to encourage visitor to explore more rural counties.
- **Iconic Activities:** Limited number of motivational outdoor activities in rural areas promoting exploration of lesser known areas.
- **Greenway / Major Trails Investment:** Limited access to Greenway type trails across the destination.
- **Blueways and Waterways:** Limited access to accredited Blueways across the destination.
- **Lakes & River Activities:** Low levels of provision of lake and river related experiences and hubs as centres of excellence for water activities.
- **Woodlands & Forest:** Limited experience development focused on woodlands and forest to grow eco-tourism activity base and increasing demand for 'wilderness' type experiences.
- **Cycle trails:** Limited road cycle trails to encourage multi-day exploration of epic routes.
- **Coastal tourism experiences:** Low levels of saleable coastal tourism experiences accessible along the Causeway Coastal route that support increased experience packaging and longer dwell time in local coastal communities.
- **Coastal Hubs:** Existing coastal activity is very dispersed with limited clusters of activity providers to encourage multi-day stays through provision of a greater variety of local experiences along the coast
- **Campervan/Motorhome Provision:** Limited distribution of motorhome/ campervan facilities in the rural hinterland in providing access to the outdoors
- **Limited Wellness Experiences:** Low numbers of innovative outdoor wellness experiences enabling the visitor to immerse themselves with surrounding nature
- **Access to Luxury Experiences:** Limited ability to access luxury or customizable experiences across the destination.
- **Visitor Facilities:** Absence of a consistent approach to visitor facilities at trails heads and coastal activities areas that can encourage cluster development and growth in experience supply.
- **Eco tourism:** Limited focus on saleable experiences aligned and eco-tourism theme aligning with growing demand among visitors to engage in sustainable visitor experiences.
- **Integration of technology:** Low levels of integration of technology into outdoor experiences to encourage increased levels of sharing of trails and routes or promote visitor advocacy.

SECTION 6

Opportunities to Consider

- **Greenways:** Develop an expanded network of Greenways and cycleways across the destination taking into consideration linkages with cross border products to add additional scale and distance.
- **Themed Looped Walks:** Development of themed short looped walks in urban and rural locations to engage with local heritage attractions, wildlife and nature sites.
- **Long Distance Trails:** Expand the range of things to do and see linked to established long distance walking trails and create iconic walking trails experiences.
- **'Learn to' Experience:** Expand the level of 'learn to' experiences set in epic rural and coastal landscapes aligned with demand for immersive learning experiences among Gen Z and Millennial audiences.
- **Bookable Activity Experiences:** Develop outdoor activity providers digital platform capacity to grow the facility for online booking and developing customizable activity experiences.
- **Wellness and Wellbeing:** Build on international demand for bespoke wellness breaks and retreats incorporating soft activities and experiences delivered intriguing landscapes and venues e.g. forest yoga, cliff walk meditation.
- **Luxury Experiences:** Develop luxury personalised outdoors experiences catering for smaller groups and demand for bespoke 'one-off' unique experiences sought by visitors.
- **Eco-Tourism Experiences:** Grow the number of eco-tourism themed activity experiences delivered against the backdrop of epic woodlands, mountains, coast, rivers and lakes.
- **Coastal Tourism Activity Centres of Excellence:** Develop niche coastal tourism centres of excellence to grow demand for coastal based experiences, on land and on water e.g. sea life watching, sea angling, boat excursions.
- **Developing Water Based Experiences:** Grow the volume of water based activities to enable the visitor to sustainably engage with the rivers, loughs and lakes.
- **Dedicated Outdoor Activity Facilities:** Develop dedicated trail head facilities to grow experience provision at trail heads and focal points for activity cluster growth.
- **Off Road Cycling:** Develop the off road cycling growth opportunity through the enhancement of trail heads and centres of excellence with increased e-bike availability and access to trails that cater for all levels of interests and proficiency.
- **Product & Experience Centres - Cycling Destinations:** Develop outdoor product experience centres around existing cycling infrastructure and trails networks to attract special interest visitors.
- **Lighthouses & Activity:** Develop activity focused trail heads at lighthouses (e.g. St John's Point) creating the opportunity to develop activity hubs and trail heads to established coastal locations.
- **Technology & Data:** Build on growing outdoor activity trends that incorporate technology into outdoor activities featuring apps to support route sharing, local route highlights and exchanging of experiences between visitors.

SECTION 7

Recognising the **Challenges**

- **Insurance Market**: Cost and availability of insurance to the activities sector impacting existing operations and restricting number of new operators to the market.
- **Pace of Investment**: Scale of capital investment in outdoor activities in nearby markets potentially leading to Northern Ireland becoming less competitive in attracting visitors based on the perceived quality of the outdoor recreation product.
- **Industry Investment Confidence**: Low levels of investment confidence among the outdoor activity sector impacted by prevailing macro economic conditions.
- **Exchange Rate**: Exchange rate impact on key markets.
- **Brexit**: Continued uncertainty surrounding Brexit.
- **Low rural supply levels**: Challenges of linking destinations across Northern Ireland due to the supply level of outdoor activity experiences in rural areas.
- **Developing Rural Routes**: Developing motivational routes and activities that disrupt visitor flows from the established coastal touring route pattern.
- **Climate Change**: Challenge of climate change leading to extreme weather events throughout the year that limit visitor participation in activities – e.g storms, extreme heat events.
- **Environment & Visitor Management**: Adopting a balanced approach to growing demand for the outdoor product and sustainable management of the environment where the experiences are delivered.
- **Evolving Consumer Demands**: Failure or inability of outdoor recreation providers to react to market trends and provide the type of outdoor experiences different markets segments are looking for.

TOURISM
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