Draft Tourism Strategy: 10 Year Plan

Analysis of Consultation Responses

JUNE 2024

CONTENTS

1. INTRODUCTION

Background to the Tourism Strategy

In August 2022, the Department for the Economy commenced work to develop a Tourism Strategy that would lead our local tourism industry through the next decade.

The Strategy is designed to be a roadmap which seeks to strive for a new and ambitious growth trajectory which cements our strong international reputation as an attractive place to visit, making our visitors feel welcome whilst at the same time helping to make the lives better for all our citizens.

Development of a Tourism Strategy has been welcomed by the sector, which has not had an Executive approved Strategy for more than a decade.

Economic Context

Our local tourism sector has become a huge success story. By 2019, the sector had experienced record growth which had been the culmination of a decade of investment throughout the region. This growth reflected the global trend which saw tourism becoming one of the fastest growing economic sectors in the world and subsequently a key driver for socio-economic progress.

With the outbreak of the COVID-19 pandemic in early 2020 the tourism industry experienced an immediate shock with an unprecedented and detrimental impact on a global scale. This was further exacerbated here with preparing for, and then delivering on, EU Exit. A constrained public expenditure outlook; issues around skills and recruitment, including too few higher paid jobs; challenging levels of economic inactivity; and low levels of productivity continue to pose significant challenges in 2024 and beyond.

With new destination choices continually emerging, we are under intense pressure to ensure our tourism offer remains competitive internationally. It is important to consider the sustainability of the sector to ensure its long-term resilience in a more agile way and protect and accelerate the future of the sector both in terms of regional spread and seasonal growth.

Development of the Strategy

The evolution of the Strategy has been an inclusive and consultative process. Departmental officials have worked closely with our Delivery Partners in Tourism Ireland (TI) and Tourism Northern Ireland (TNI) as well as wider industry stakeholders to shape the Strategy.

Key milestones in the development of the Strategy include:

- In January 2023, the Department issued a **Vision Statement** document to TI and TNI as a first step. The aim of the Vision Statement was to provide a strategic direction for these Delivery Partners to help them plan for the incoming year and beyond.
- In April 2023, a **Stakeholder Engagement Session** was held, seeking views on the approach and some potential metrics. Colleagues from TI and TNI attended this session, as well as key industry stakeholders, including representatives from each of the Council areas and local attractions.
- To ensure the Tourism Strategy complements and aligns with other developing NICS policies and strategies that share an area of mutual interest with tourism, **engagement has taken place with officials in other key Executive Departments**.
- A further extensive engagement process took place between November 2023 and February 2024, including **consultation with the tourism industry and a wider public consultation**.
- The Department consulted with a small number of industry **critical friends** at each stage of development, seeking views on current barriers, opportunities and potential indicators which would drive growth in tourism and help shape the final Strategy.

Purpose of this Report

This report summarises the findings of the **public consultation** process. It does not list all comments received. Departmental staff have endeavoured to summarise the responses without judgement or interpretation. In preparing this report, we have identified common themes and issues raised in response to each question – both positive and negative. It does not aim to cover the entire breadth of the consultation responses.

A report summarising the findings of the **industry consultation** (outlined below) is attached at **Annex A**. All findings will, in due course, inform and help shape the final Strategy.

It should be noted the views expressed in the report are representative of the responses received and are not necessarily shared by the Department.

2.   OVERVIEW OF CONSULTATION PROCESS

The consultation was designed to encourage feedback on key elements of the draft Strategy, including the proposed Vision, Mission and Strategic Aim and to seek views on future delivery.

The Department carried out a public and industry wide consultation from 6 November 2023 to 2 February 2024. TNI led on consultation with the tourism industry while the Department led on the wider public consultation.

Industry Consultation Methodology

The consultation with the tourism industry took the form of six regional workshop sessions and TNI appointed Ann McGregor as a facilitator to ensure the consultation process was both independent and objective. The workshops involved 10-20 participants from each interest area (except for workshop six which was arranged to facilitate two key organisations). The workshops consisted of:

- Three workshops for tourism sectors businesses. Industry participants were invited to participate from across the ten subsectors of the tourism industry based on the Task & Finish groups established for the Tourism Recovery Action Plan.[1]
- One workshops for representative bodies such as Northern Ireland Tourism Alliance, Hospitality Ulster, Northern Ireland Hotels Federation and Destination Management Organisations.
- One workshops for Tourism Directors/Managers from the eleven Councils.
- A meeting with the CEOs of the Hotel Federation and Food NI.

The workshop attendees received the draft Tourism Strategy, the agenda, the list of actions from the consultation and questions for discussion in advance, to enable them to give structured feedback, guided by the facilitator, on the day.

Public Consultation Methodology

In total, 121 responses were received via the **public consultation** process. Responses were received in the following formats:

- **Citizen Space**: Respondents were able to respond to a structured questionnaire using this NICS-wide online consultation tool as it provided robust data security and a suite of analysis tools.
- **Email Responses**: Respondents were able to respond via email. Responses received via this method were both structured (using the Word version of the consultation questionnaire) and unstructured (a general responses without specific reference to consultation questions). Where responses were structured and did not need any interpretation, they were manually added to Citizen Space. Where the responses were unstructured, the Department was not able to include all of the email responses received in this manner into the statistics presented within this report.

---

1   Tourism Recovery Action Plan

However, in recognition of the fact that not all sections of society have access to or the ability to complete surveys online, it was made clear that the consultation could be responded to via e-mail or via post if necessary.

As noted previously, the purpose of this report is to summarise the 121 responses received via the public consultation - 111 from named businesses or individuals and 10 anonymous. The majority (91) of responses were hosted on Citizen Space with 54 being submitted directly and 37 manually uploaded by Departmental staff as they were received via email. A further 30 responses could not be uploaded to Citizen Space as they were made without specific reference to the consultation questions.

However, it is important to emphasise that all consultation responses received were considered and are reflected in the qualitative analysis within this report. In compiling the comments and views, departmental staff examined these responses in the same manner as they did the 91 responses on Citizen Space and any feedback from these is incorporated within the summary text.

3. ANALYSIS OF PUBLIC CONSULTATION RESPONSES BY QUESTION

This section summarises the quantitative and qualitative responses received. A full list of respondents can be found at **Annex B**.

Q1. What type of organisation to you represent?

Of the 91 responses to this question, 43% of respondents were from the tourism industry. However, there was also good representation from across both the public and private sectors.
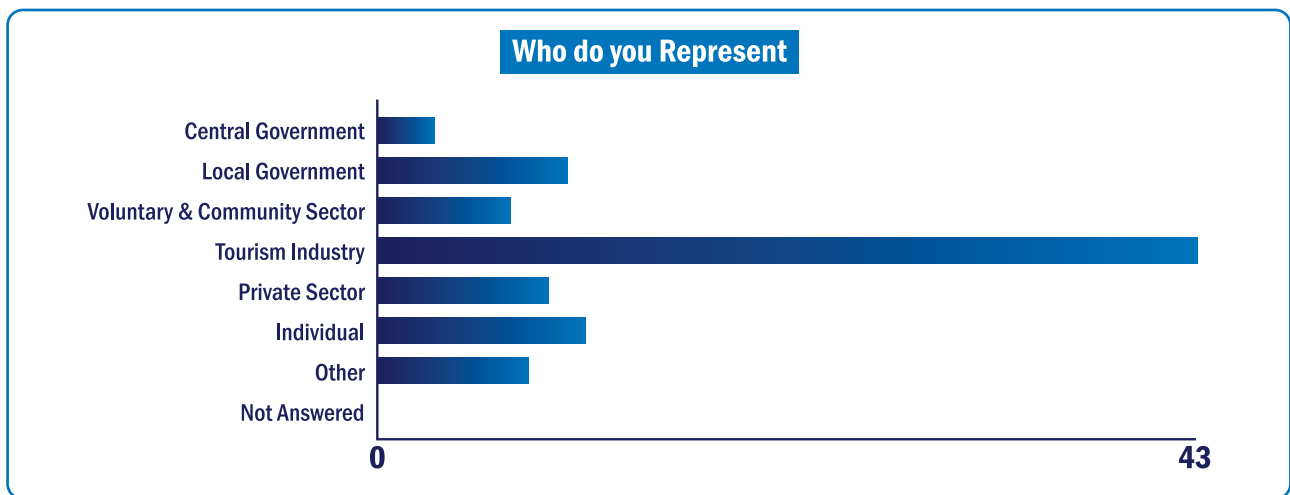

Figure 1: Bar Chart to show breakdown of respondents by sector

Those indicating they were involved in the tourism industry were invited to provide a description of their business. The results are shown in the bar chart below.
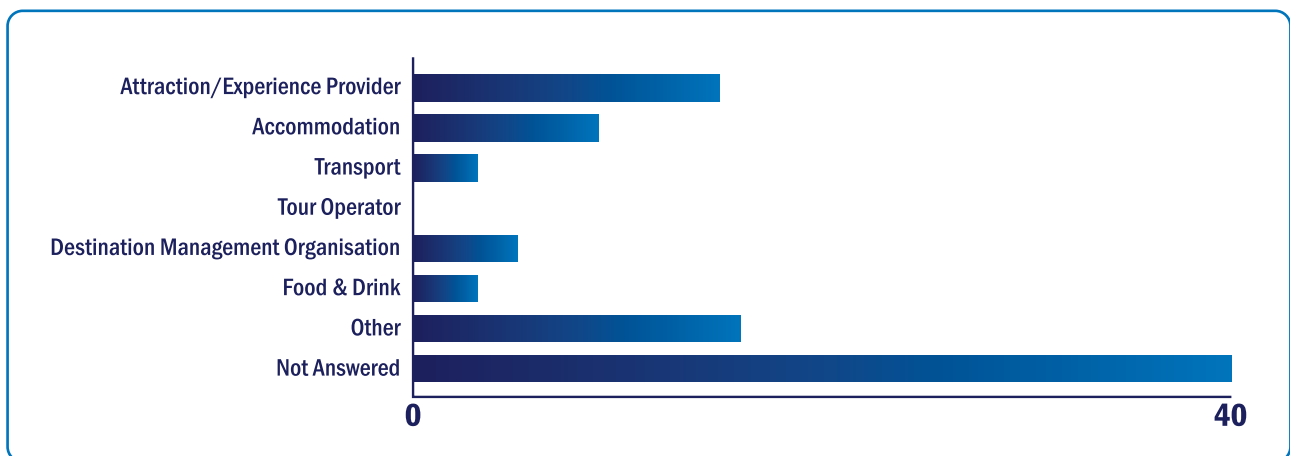

Figure 2: Bar Chart to show breakdown of tourism industry respondents

Q2: Thinking of the Vision, Mission and Strategic Aim, to what extent do you agree or disagree that they are the right Vision, Mission and Strategic Aim for the Industry?

Of those who responded:

- 64% (58) agreed/strongly agreed
- 19% (17) disagreed/strongly disagreed
- 17% (16) neither agreed nor disagreed

The majority of respondents agreed with the proposed Vision and Mission, citing it as concise and meaningful. Respondents particularly welcomed the recognition that creating opportunities to spread sustainable economic, social and environment benefits around the region will benefit communities in all parts, all year round. Other comments included:

- the welcome recognition that our scenic landscapes and unique heritage and culture are our unique selling point;
- recognition of the need to balance growth with sustainability; and
- strong endorsement of the desire to connect more visitors to nature.

Of those who disagreed with the Vision, Mission and Strategic Aim, respondents reported they were too bland and lacked ambition. Other comments included:

- they failed to recognise the enduring strength of domestic tourism and the 'staycation' market; and
- they needed greater depth of modelling against the targets.

In terms of the Strategic Aim, refinement would be welcomed. Respondents felt it was very important to provide clarity to the sector on the value of tourism in the region, a value which would act as a baseline for everyone. This was in reference to the piece commissioned by the NI Tourism Alliance and produced by Grant Thornton[2] which quoted a much higher value of tourism than the officially produced NISRA statistics. This baseline would then form the basis for a more precise growth target, rather than a percentage range.

---

2 Valuing the Tourism Industry in Northern Ireland

Q3: Thinking about the Themes and associated Indicators outlined in the Strategy, to what extent do you agree or disagree that they are the right ones to target future growth of the industry?

Of those who responded:

- 82% agreed/strongly agreed
- 5% disagreed/strongly disagreed
- 13% neither agreed nor disagreed

Respondents who supported the Themes and associated Indicators agreed they were the right Themes to target future growth of the tourism industry. Respondents did highlight the Themes overlap considerably and cannot be considered in isolation. Delivery of the Strategy is dependent on achieving the Indicators in ALL of Themes. In addition, those respondents would still like to see:

Innovative
- Definition of 'innovation' for the tourism sector.

Inclusive
- Action to support professional career development to support sustainable tourism development and growth.

Sustainable
- an additional Indicator on increasing the level of investment by the tourism sector to support our natural and built heritage;
- SMART targets which will (for example) demonstrate how the tourism sector will take leadership to identify its carbon footprint and establish quantitative targets to reduce this through robust actions;
- build awareness of sustainable practices in businesses; and
- deliver a Regional Sustainable Development Programme.

Attractive
- consider amending this theme to 'Distinctive';
- include terms such as 'Authentic', 'Affordable' and 'Accessible';
- increased investment by Councils to fuel the night time economy;
- increased 'regional marketing' to encourage more people to see other parts of NI, not just the North Coast;
- strengthen the narrative to promote our local artisans and our arts and creative industries; and
- additional targets in order to sustain the domestic and closer to home markets.

<u>Collaborative</u>
- a number of indicators to provide clarity on how this will be successfully achieved;
- joined up Government approach for policy development and support, taking account of the number of different policies and legislation throughout the different NICS Departments;
- more collaboration between Councils and regional DMOs;
- appointment of a Destination Manager in TNI to oversee delivery and collaboration.

There was a small number of respondents who did not support the Themes and associated Indicators, the main reasons being they lacked ambition and were constrained by the 10x Vision. One respondent suggested that 'Collaborative' was not a standalone Theme and should be integrated across the Strategy. It was suggested 'Connectivity' was a more suitable Theme – both physical and digital. A small number of respondents requested further consideration was given to Attractive and Collaborative themes to focus on developing our sense of Place and on our People as a key attribute.

Q4: What would you view as the five most important actions which could contribute to achieving the indicators outlined within the Strategy?

The draft Strategy recognises the challenges facing the tourism industry as we move through the next decade. Respondents were asked to identify, from a list of options, the five most important actions which would contribute to delivery of the Indicators outlined in the draft Strategy. Respondents were asked to note a number of these actions would be dependent on the Public Expenditure available and the wider political and financial climate.

The chart below provides insight into the responses to this question.

Responses	%
Encourage and develop NI cross government collaboration	58.24%
More collaboration between councils to produce integrated tourism/destination plans at local level	54.95%
Promote the role tourism play in sustaining other sectors, eg culture arts & heritage and food	50.55%
Marketing Campaigns – Regional messaging across international campaigns	45.05%
Support local events and festivals	32.97%
A Regenerative/Sustainable Tourism Development Programme similar to the EDP to support the development of new and enhanced tourism experiences	31.87%
Supportive larger events that attract people from outside of NI	27.47%
Develop a NI Events Framework	26.37%
Encourage and facilitate collaboration within the sector to share best practice/knowledge/networks	26.37%
Build awareness in businesses of sustainability (green) practices	24.18%

Responses	%
Build awareness of, and support for, accessing sources of alternative funding	21.98%
Additional Data Collection and Robust Benchmarking	20.88%
Develop and deliver a bespoke Skills Action Plan	19.78%
Promote importance of Business Tourism and deliver on Business Tourism Strategy	18.68%
Develop an air route development programme to improve connectivity with France and Germany	15.38%
Build awareness in businesses of innovation within the tourism sector	14.29%
Increased delivery of Travel & Tourism programmes in schools leading to increased qualifications	12.09%
Stronger connection between employers/delivery partners/programmes to support businesses to participate in opportunities	12.09%
Develop a Tourism Employer Excellence Programme	9.89%
Formally recognise/accredit businesses for demonstrating innovation	9.89%
Develop a bespoke Sustainability Accreditation Scheme and/or promote a framework to promote and recognise other quality assured sustainability accreditation schemes	8.79%
Deliver an annual tourism awards programme to recognise best practice in the industry	7.69%
Develop a Quality Employer Charter	2.20%

Q5: What do you think your organisation, business or those you represent, could deliver to contribute towards the Tourism Strategy? This could be in general, or in terms of the specific Themes and Indicators set out in the Strategy.

- We received a response to this question from 33% of the total number of respondents. Those who did answer this question offered their assistance in the following areas:
- Willingness to be part of a Steering Group.
- Assistance in development of Accreditation Schemes for rural parks.
- Guidance on climate change adaptation measures to help the tourism industry become more resilient.
- Assistance in promoting innovation in the tourism industry using new technologies, business efficiency and sustainability measures.
- Experience in working with Councils on local business partnerships and all island events.

Q6: Based on your responses to the above questions, do you have any further comment on the Strategy as a whole? i.e. Is there anything missing? Is it taking the industry on the right path for current and future challenges/opportunities?

Respondents were invited to provide any additional information which would contribute to the delivery of the Strategy. This was a free text field and responses have been categorised below into a number of high level themes.

- **Funding and Action Plan**: Desire for greater certainty on funding and an associated action plan.
- **Skills/Career Pathways**: Calls for a bespoke Skills Action Plan.
- **All Island Brand**: More emphasis on the benefits of an all-island economy and linking between marketing brands in both jurisdictions.
- **Collaboration with the Sector**: A DfE led partnership group to include government departments, council and industry representatives to oversee implementation of the Strategy through TI and TNI Business Plans.
- **Waterways and Loughs**: Emphasise importance and contribution.
- **Air Connectivity and Access**: A barrier that needs to be addressed both in terms of access by air, sea and land along with the need for sustainable transport solutions once visitors arrive here to encourage regional spread and seasonal growth.
- **Events**: International, national and local. Strong emphasis on their importance and desire to see that strengthened in the Strategy.
- **Data Collection**: Robust and real time data collection and sharing to provide clarity and consistency across the sector, including dashboards which facilitate regional and local insights.
- **Business Tourism**: Recognition of its ability to drive season and midweek, regional high value spend.
- **Review of Legislation:** Desire to see the Tourism (NI) Order 1992 updated.
- **Planning:** Desire to see more streamlined planning system.
- **ETAs:** Recognition that the UK government's ETA scheme poses a threat to seamless all-island travel.
- **VAT:** Recognition that the VAT rate for hospitality in ROI is lower than in NI which could act as a competitive disadvantage and desire to lobby UK government on this issue.
- **Apprenticeship Levy:** Desire for government to consider introduction of an apprenticeship levy.

4. NEXT STEPS

The evidence gathered through the consultation process will inform the final Tourism Strategy: 10 Year Plan, which will be published in due course. It will also greatly inform how we create better alignment between government and industry to deliver a Tourism Strategy which will support and guide the industry to prepare for future success for the benefit of all of our communities.

The DfE Tourism Strategy team would like to take this opportunity to thank the many stakeholders from across the public, private and voluntary sectors, and the general public, who contributed their views and expertise to our consultation process.

5. ANNEXES

Annex A

Tourism Sector Response

Tourism NI appointed Ann McGregor as a facilitator to conduct an industry-wide consultation led by Tourism NI. The facilitator carried out a series of workshops across the region which provided the opportunity for the industry to give structured feedback on the draft Tourism Strategy.

The subsequent report of the industry-wide consultation can be accessed on the Department for the Economy website (economy-ni.gov.uk).

Annex B

List of Respondents to Public Consultation on Draft Tourism Strategy: 10 Year Plan

Organisations providing responses:

Armagh City, Banbridge and Craigavon Borough Council

Absolute Organic Wine Limited at An t-Ionad Fíona Wine Center

ADS Northern Ireland

Ards and North Down Borough Council

Antrim and Newtownabbey Borough Council

Ards and North Down Borough Council

Armagh Observatory and Planetarium

Arts Council of Northern Ireland

Ballyrobert Gardens

Belfast Chamber of Trade and Commerce Ltd

Belfast City Airport

Belfast City Council

Belfast Harbour

Belfast Hotel Group

Ben's Hollow Forge

Belfast Health and Social Care Trust

Bradkeel Social Farm

British Holiday and Home Parks Association

Bus & Coach NI

Butterlope Farm

Carrickfergus Enterprise

Carrowcrin Consulting

Causeway Coast & Glens Borough Council

Causeway Coast and Glens Heritage Trust

City of Derry Airport

Craft Northern Ireland

DAERA Northern Ireland Environment Agency

Deloitte MCS Ltd

Derry City & Strabane District Council

Digital Twins Consultant

Dromore Chamber of Commerce

EastSide Partnership Belfast

Fáilte Feirste Thiar

Fermanagh and Omagh District Council

Food NI

Found Home Films

Foyle Port

Galgorm Castle

Galgorm Collection

Geological Survey of Northern Ireland

Health Innovation Research Alliance Northern Ireland

Historic Houses

Hospitality and Tourism Skills (HATS) Network

Hospitality Ulster

ICC Belfast

Joanne Campbell Artwork

Lisburn & Castlereagh City Council

Limitless Adventure Centre

Linen Mill Studios Ltd (Game of Thrones Studio Tour)

Lissan House and Demesne

Lo & Slo

Lough Neagh Partnership Ltd

Loughinsholin

Marine Taskforce

Mid & East Antrim Borough Council

Mid Ulster District Council

Midtown Makers

Mountain Sky Glamping

Mourne Heritage Trust

Murphy Associates

National Churches Trust

National Museums NI

National Outdoor Recreation Forum (NORF)

NI Cyber

Northern Ireland Environment Link

NI Marine Taskforce

Newry, Mourne and Down District Council

Northern Ireland Hotels Federation

Northern Ireland Marine Task Force

Northern Ireland Tourism Alliance

Northern Ireland Tourist Guiding Association

Outscape

Price Waterhouse Cooper

RSPB Northern Ireland

Save Benbradagh Group

Shepherds Rest Campsite

Sinn Féin

Sljivic Consulting Ltd

Social Democratic and Labour Party

Strangford Lough Tourism Cluster

Summerisland

Taste Causeway CIC

TBL International

The Alliance Party

The National Lottery Heritage Fund

The National Trust

The Software Alliance NI

Think6

Tour Guides NI

Ulster Architectural Heritage

University of Ulster

Vertical Structure

Visit Belfast

Visit Derry

VisitAR Guide Ltd

Waterways Ireland

White River Charters

In addition to those organisations listed above, a number of responses were received from both named and anonymous individuals.