

Regional Workshop

Developing a Tourism Strategy for Northern Ireland

Cultra Manor
11th February 2016





Department of
**Enterprise, Trade
and Investment**

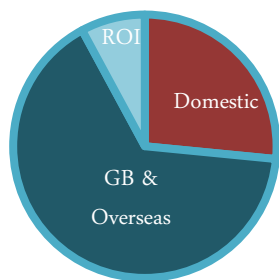
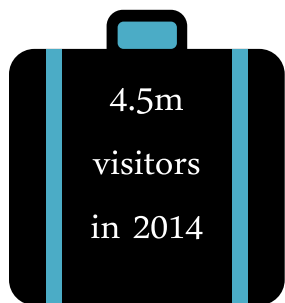
Deloitte.

WELCOME



DEVELOPING A TOURISM STRATEGY FOR NORTHERN IRELAND TO 2025

ECONOMIC CONTRIBUTION OF TOURISM



total revenue of £751m, of
which:

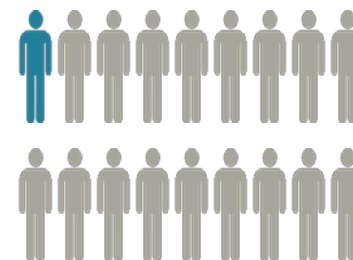
£446m from GB & overseas

£238m from domestic

£68m from ROI

5.2%

of NI's GDP



supports
1 in every 18 jobs

representing 43,000 jobs

Tourism's path to growth

2000 - 2004
Finding a
new norm

2004 - 2008
Coming of Age

2008 - 2011
Dream to reality

2012 - 2014
Global recognition

2014 - 2020
Internationalising NI

Visitor Spend

2010
£616m

2011
£642m

2012
£689m

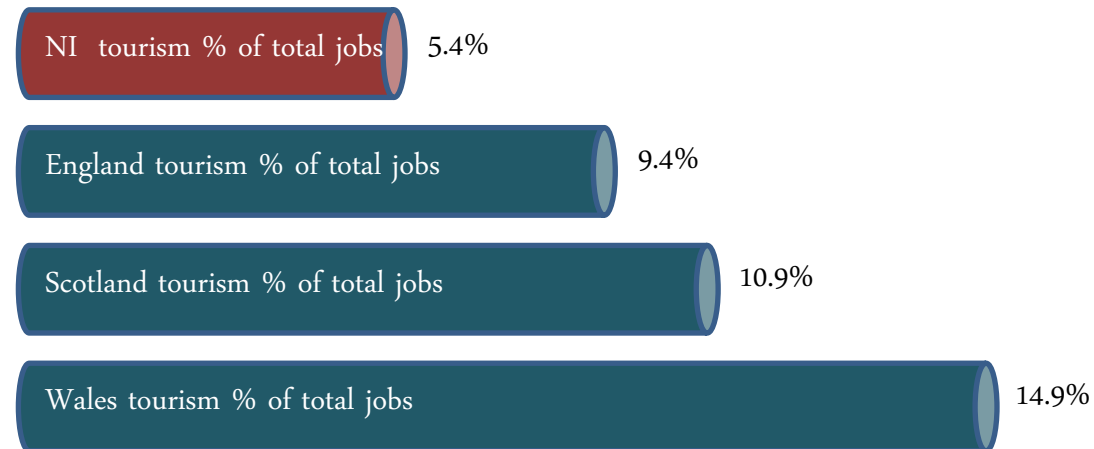
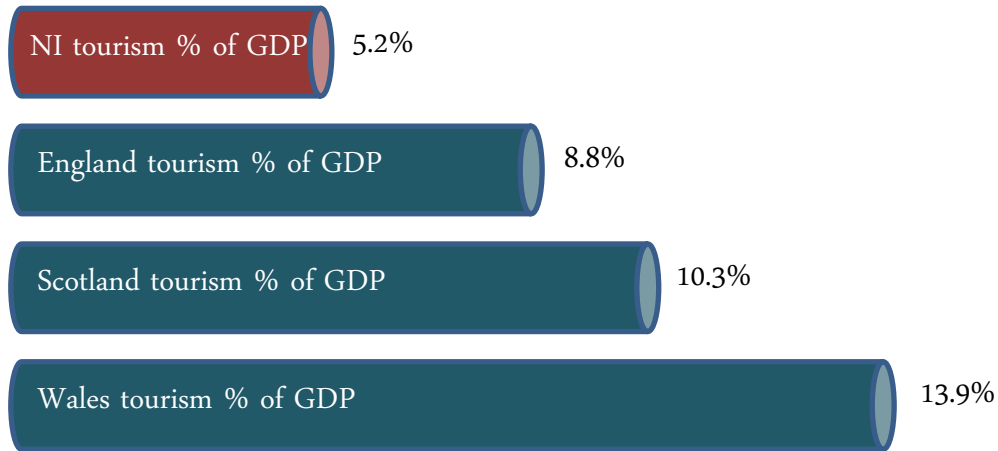
2013
£723m

2014
£751m

2020 target
£1bn



Health check in comparison to other regions



Regional Consultations – Workshops Agenda

Time	Activity
08.30 – 09.30	Arrival/Networking/Coffee
09.30 – 10.15	<ul style="list-style-type: none">• Welcome - DETI• The challenge – Aidan Pender, CHL• Working group sessions – Colin Mounstephen, Deloitte
10.15 – 11.00	Working Groups
11.00 – 11.15	Coffee Break
11.15 – 11.50	Table feedback & discussion
11.50 – 12.00	Next steps

The big picture: Aidan Pender

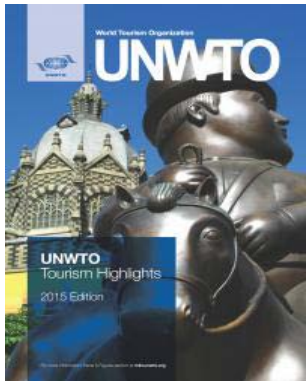
- Global trends
- How do you stand out
- Meet the consumer
- Look out!
- Big opportunities?

Global Trends

Tourism – Global Trends



- **Disruption – The “Sharing Economy”.**
- **From Standard Commodity to Unique Experience.**
- **From Demographics to Psychographics...think...**



- **Is this all true? particularly and strongly so for Northern Ireland.**

Tourism – Global Trends

- **1.1.billion tourists travelled abroad in 2014**
- **Growth - doubling from 1 to 2 billion between 2013 and 2035**
- **Europe is the most visited in the world...but so competitive**

How do you stand out in
the crowd?



It can be difficult to achieve stand-out in the noisy tourism market-place Even if you're Kerry.



“Why Do You Have a Girl’s Name on the Side of Your Bus”??

Authentic
experiences -
Lobster fishing in
Prince Edward
Island



“Your perfect chance to take part in Island life,
meet the locals and
go home with a story worth telling the neighbours.”

Wild Atlantic Way



1. Searching for Global attribute – Atlantic.
2. Irish coastal descriptor – Wild.
3. Avoiding the suffocation of the local.
4. You can't sell it if you can't name it.
5. "I did the Wild Atlantic Way 30 years ago!".

Meet the consumer

Culturally Curious



Great Escapers



Social Energisers



Look out!

Market Development – Thinking Internationally



1. **Outward Looking – International Focus.**
2. **Export businesses tend to attract more government interest and support.**
3. **Align with overseas market intelligence**

4. **Competitive – Cheaper, Better, Different, Authentic, Unique?**

5. **“What do we have to offer in NI?”** X

“What does the international consumer want?” ✓

6. **The domestic market remains important as a base platform.**

Big opportunities?

The Northern Ireland Visitor Experience



1. **Consumer expectations are high**
2. **Lots to see, do and experience?**
3. **The “ Northern Irish Welcome”, food, service, local knowledge, languages?**
4. **Utilities – Wifi, Public Transport.**

Digital



1. Its oxygen!
2. Business to consumer contact
3. Dynamic, entertaining on-line content
4. Focus is on things to see & do ... rather than “my product” – that comes later.
5. Search Engine Optimisation...
6. Consumers research, plan, book, and pay on-line.

Industry Voice



1. **Scottish Tourism Alliance**
2. **Role for industry-wide Tourism voice in NI?**
3. **Who?**
4. **To what purpose?**
5. **To what agenda?**
6. **To what Listener?**

Delivering Growth in a time of Fiscal Constraint.



1. Can growth be industry-led, but government-enabled?
2. What is the proper role for a government with less money?
3. Joining-up the government dots – for a more coherent and pro-business approach?

Are we as good as we think we are?

**Surely, there's nothing stopping us
being consistently great?**

Working Groups

Introduction: Colin Mounstephen

Working Groups

Time for your
expertise and
experience

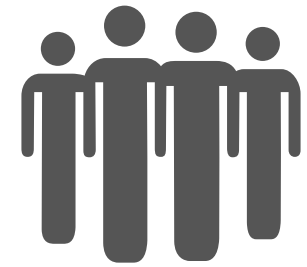
Introduction to the
themes and some
principles for discussion



Some principles to frame your discussion

- *be forward looking: Tourism in 2025 – what will be different?*
- *be creative and contrarian – think outside the box*
- *be consumer focused – put yourself in their shoes*
- *be honest - are we as good as we think we are?*
- *be ambitious – lets raise the bar*

Session 2 – Working Groups



Policy/Issues

Events and
business
tourism



What skills do
we need?

Industry role?
Government
role?



Going digital

Market –
thinking
internationally



COFFEE BREAK

Working Groups

Feedback

Session 3: Capturing key messages

We will be taking away the notes!

Verbal feedback (3 minutes per table)

- **One key priority / point of consensus**
 - **One notable opportunity or challenge**
 - **A question raised that needs further consideration**
 - **An example of leading edge practice from elsewhere**
-
- **Comment or question in response from the floor (1 min)**



Events and Business tourism



1. What profile of events over the next 10 years would drive the most economic impact?
2. Which of our large events offer the best opportunity to drive out of state tourism?
3. Given budget constraints how should events which draw in out-of-state visitors be funded?



1. How can we meet the expectations of delegates inside and outside the conference centre?
2. What are opportunities for extending delegate stay, promoting repeat visits and ensuring benefits beyond Belfast?
3. Should a new conference subvention scheme be developed to drive business tourism?

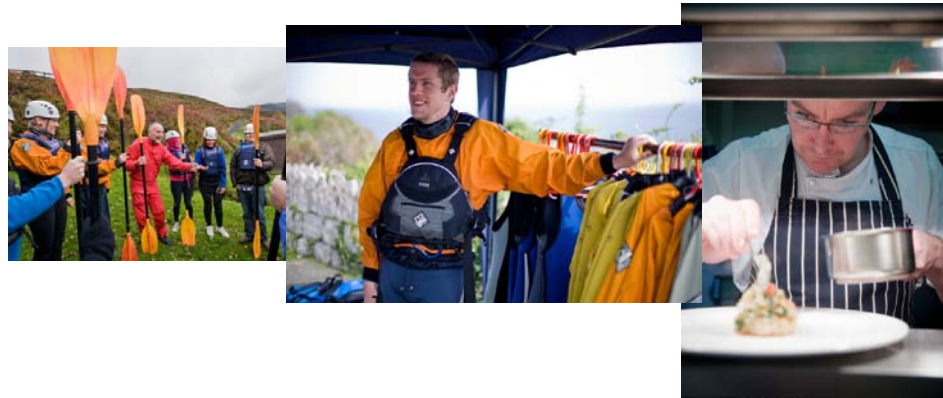
Market: thinking internationally...?



Given what we know about our market currently (table host to have chart of current visitor profile):

- What changes are likely over the next ten years?
- What does that mean for our customer profile and their expectations?
- What do we need to do to meet and exceed those expectations?
- Who needs to drive such changes?

Skills



1. What are the skills needs within the tourism sector now and looking forward to 2025?
2. What issues are impacting on the image of the sector as a career of choice and how can these be addressed?
3. How should the skills needs of existing staff within the tourism and hospitality sectors be addressed?



“A tourism product is what you buy. A tourism experience is what you remember.”



Developing ...Clustering...Promoting ...Delivering experiences

What do each of these mean?

How well are we doing these at a local level?

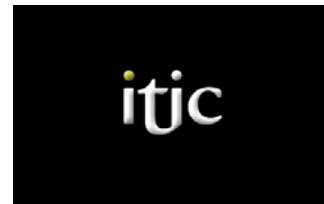
How does the local link to the larger experience in NI?

What larger experience in NI could get international attention?

How do we develop this experience further?

Role of industry and role of government...how do these need to develop?

1. What are the strengths and weaknesses of the tourism industry in NI?
2. Should government and tourism agencies encourage leadership capability at all levels within the tourism sector? How so?
3. Collaboration – do we need to collaborate more? How does collaboration happen?
4. Would the tourism sector in NI benefit from having a representative private sector industry association, similar in scope to those found in most other jurisdictions?
5. Should government enable the private sector to develop a single industry association? If yes, how so?



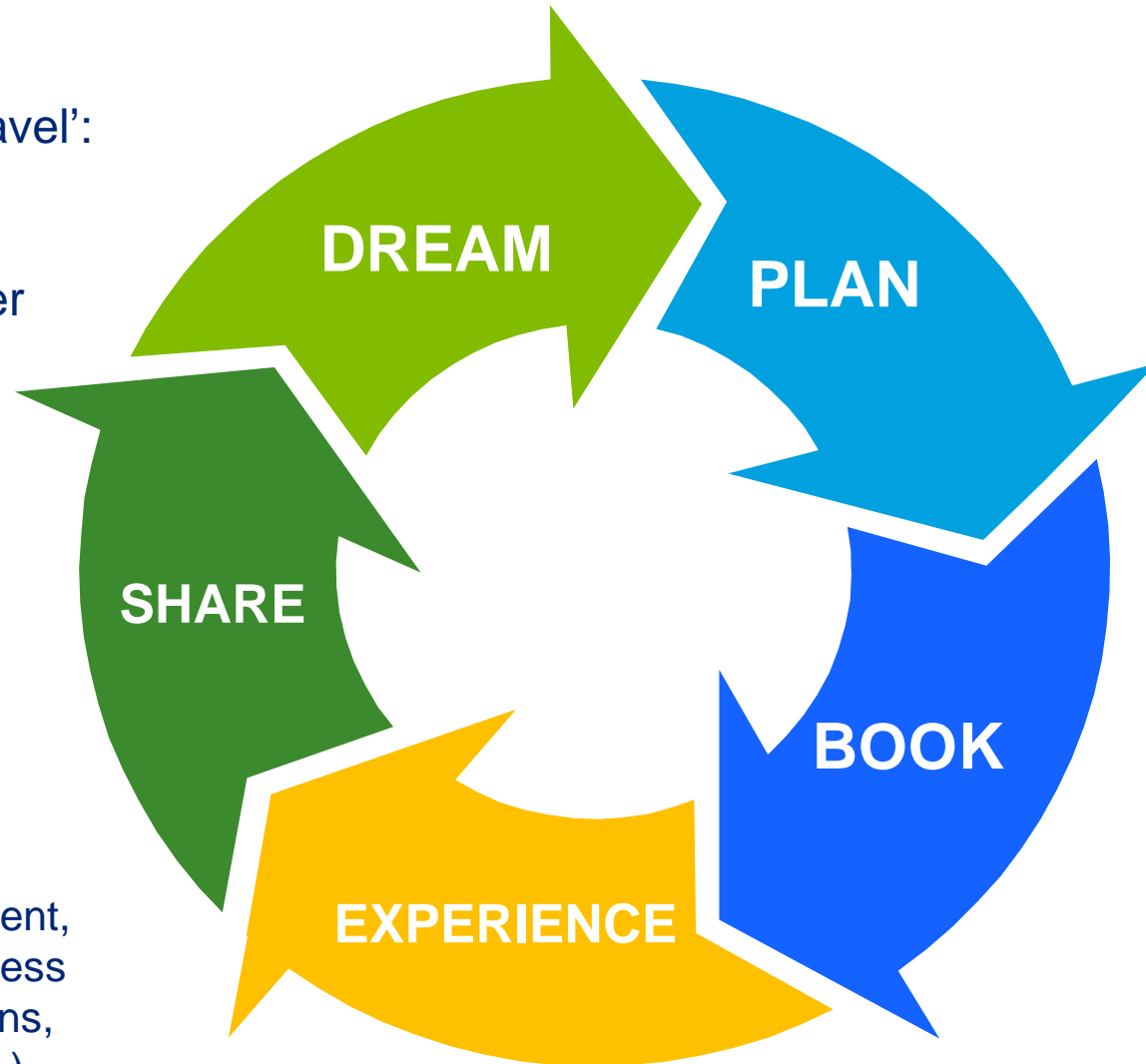
The digital experience

How does the tourism industry in NI best use digital over the next ten years?

Given visitors' 'five stages of travel':

- What would a great digital experience look like?
- What can we learn from other destinations?
- What do we need to do to deliver a great NI digital experience?
- How can this behaviour be supported and incentivised?

(...Website, Social media, Online community, Blogging, Content, Language / imagery / dynamic content, Review sites (e.g. Tripadvisor), Access to sample itineraries, Email questions, Sharing experience, Sharing data...)



A scenic autumn forest with a stream, stone steps, and a waterfall. The trees are in various shades of green and yellow, and the ground is covered in fallen leaves. The stream flows through the center, with a small waterfall on the right side. The text "Next Steps" is overlaid on the left side of the image.

Next Steps

Next steps

- February – regional consultation events
- March & April – draft vision and action planning
- May – draft strategy prepared
- Summer 2016 – Minister for the Economy to publicly consult on draft strategy



Thank you for your input

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