

Tourism Strategy 2025

Headline Messages from Regional Engagement

DETI and Tourism NI would like to thank stakeholders for their attendance and engagement at the six regional workshops which took place during February 2016. Close to 300 people attended the workshops and it was extremely useful to hear the views expressed on the development of the new tourism strategy.

From the engagement process, five broad messages have been distilled which are framing the thinking as the tourism strategy develops.

1. The tourism strategy is an opportunity to change mind-sets

a. The baseline message:

- i. Tourism is increasingly recognised as a growth sector, offering significant economic opportunity for Northern Ireland, creating jobs and wealth.**
- ii. This should be reflected in the mind-set of trade and government.**

b. Looking forward: the strategy should be bold, inspire belief and challenge complacency.

2. Who the strategy is for

a. The baseline message:

- i. The tourism sector includes private, not-for-profit and government organisations.**
- ii. The tourism trade is made up of a small number of larger organisations and lots of micro-enterprises. It is considered 'fragmented'.**
- iii. Many parts of government also have a role: DETI; Tourism NI, Tourism Ireland; local government; other parts of central government involved (e.g. environment, transport). It is also considered 'fragmented'.**
- iv. Roles within tourism are evolving. Government will broadly take on more of an enabling role, as the private and not-for-profit sectors increase their**

sector leadership alongside their delivery role. Some parts of government, for example local government, will remain involved in delivery.

b. Looking forward: the strategy needs to 'speak' to private and not-for-profit sectors as well as government. This should influence the strategy's 'look and feel'. Given the fragmentation, the strategy is an opportunity to develop coherence.

3. The tourism sector should be outward looking ...and it needs to be internationally competitive

a. The baseline message:

- i. The domestic market, while an important base market, is finite.**
- ii. The out of state market is huge with significant sustainable growth potential.**

b. Looking forward: the strategy should focus on what it means to be competitive on the international stage in order to grow out of state tourism. The focus on out of state visitors should challenge over-reliance on the domestic market.

4. The status of tourism should be elevated given its economic importance

a. The baseline message:

- i. How seriously is tourism taken: By government? As a career choice? By entrepreneurs? By investors?**

b. Looking forward:

- i. There should be increased focus on visitor spend (£) and jobs created/ sustained.**
- ii. Use language deliberately...out of state visitors spending money here means this is an 'export' industry, it is about 'investment' rather than 'expenditure'.**
- iii. Continue to support the sector to commercialise and professionalise.**

5. The strategy is an opportunity to make choices and set future direction

a. The baseline message:

- i. The lack of a strategy has allowed incoherence to grow gradually across all parts of the sector.**

b. Looking forward: The strategy is an opportunity to make some key choices and develop coherence: what will being internationally competitive look like; what investment decisions are required; what compelling message (or messages) do we move forward with?

These key messages set the framework for the next stage of the strategy developmental process, which is to produce a draft vision document followed by an action plan. Further targeted engagement with stakeholders will take place through April and May as the vision and action plan take shape.

The vision and action plan will form the basis of the new strategy, the draft of which will be presented to the Minister for the Economy in mid 2016 for consideration and will then go out for public consultation.