



**TOURISM NI**

**CORPORATE PLAN  
2025/28  
DRAFT**

TOURISMNI.COM

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# 1. Statement of Intent from the Chair and Chief Executive

The restoration of the Northern Ireland (NI) Assembly and the appointment of the Minister for the Economy has brought a renewed focus on the importance of NI's tourism industry.

Having now recovered from the impact of the Covid-19 pandemic, the tourism industry is well placed to:

- Support a regionally balanced economy.
- Increase the proportion of people working in good jobs.
- Raise productivity levels.
- Reduce carbon emissions.

The recently published Tourism Vision & Action Plan: 10-Year Plan to 2035 recognises the important contribution which the tourism sector can make to our region's economy. Tourism Northern Ireland (NI) welcomes the ambition set out in the Plan and we look forward to playing our part in making this vision a reality over the next ten years.

This Corporate Plan sets out the actions which we will undertake over the next three years to help realise that vision and fulfill the potential of NI's tourism industry. At Tourism NI we have a significant role to play in supporting our industry to succeed in a highly competitive global market.

We plan to do this through our award-winning marketing and promotional campaigns on the island of Ireland and by supporting the work of Tourism Ireland overseas. Together we will also continue to help our businesses to secure contracts with tour operators from across the globe.

We will support tourism enterprises across NI to innovate, increase productivity and create more sustainable tourism experiences. We will also work to help them recruit, develop and retain the talent required to compete globally and meet the expectations of increasingly discerning international visitors.

We will work closely with local councils to support the delivery of the tourism-led regeneration projects within the City and Growth Deals Programme. These projects are central to our ambition of increasing visitor numbers to NI, encouraging them to stay longer, travel further and make a greater contribution to local communities.

Public sector finances remain very challenging, and this is likely to continue throughout the lifespan of this plan. It is more important than ever that we work in collaboration with our many partners to make best use of our collective resources and deliver on the potential of our tourism industry over the next three years.

**Ellvena Graham OBE**  
Chair, Tourism NI

**Áine Kearney**  
Chief Executive (Acting), Tourism NI

## 2. Tourism Northern Ireland Strategic Framework 2025/28

### Tourism NI Goal

By 2028: Support the industry to grow the domestic market by 2% year on year and achieve a 10% value share of Republic of Ireland trips on the island of Ireland

Five Strategic Objectives:	1. <b>Regional Balance:</b> a balance between urban, rural, and coastal destinations - ensuring that investment and economic activity is spread broadly across Northern Ireland, and not overly concentrated in the capital city of Belfast and a concentration of honeypot areas. Regional Balance is not about displacement - it is about generating new growth.		
	2. <b>Good Jobs:</b> secure, flexible, rewarding employment with supportive employers, offering opportunities for skills development and career progression where wellbeing is valued.		
	3. <b>Productivity:</b> a competitive tourism industry that offers a compelling proposition, is innovative, and maximises resources and the potential of our assets throughout the year.		
	4. <b>Sustainability:</b> a tourism industry that is economically, environmentally and socially sustainable.		
	5. <b>Strong Organisational Capability:</b> Tourism NI is an effective, diverse, innovative and impactful organisation for which people are proud to work.		
Through the development and marketing of:	An internationally compelling destination focusing on our Landscape, Heritage, History & Culture and world class Food & Drink offer		
Resulting in:	Visitors Staying Longer, Spending More, All Year Round, Across the Region		
Enabled by:	• All Island Collaboration	• Insights and Data Analytics	• Industry Capacity Building
	• Local Network Building	• Supportive Policy Environment	• Supporting Sales Growth
	• Strategic Leadership through Stakeholder Engagement	• Product Development	• Stimulating Consumer Demand



### 3. Tourism Northern Ireland's Role

Tourism NI is a Non-Departmental Public Body (NDPB) sponsored by the Department for the Economy (DfE). The organisation was originally set up as the Northern Ireland Tourist Board (NITB) in 1948 and operates under the Tourism (Northern Ireland) Order 1992. It was re-branded Tourism NI in January 2015.

Tourism NI's principal functions are to:

- Encourage tourism.
- Encourage the provision and improvement of tourist facilities and amenities.
- Certify tourism accommodation.

### 4. Tourism Northern Ireland's Mission and Core Purpose

Our mission is to support the development of a productive, regionally balanced and sustainable tourism industry for all people and places in Northern Ireland which provides workers with good jobs and enriches its people, its economy and its guests.

**We will do this through:**

- Supporting our industry to raise productivity and grow sustainably.
- Promoting NI as a must-see destination to markets which offer the greatest potential for growth.
- Developing a tourism ecosystem that presents opportunities for all, bringing economic and community benefit through good jobs and regional balance across Northern Ireland.
- Supporting the tourism sector to become greener, working towards net zero and contributing to the sustainable development of our built and natural environment.
- Supporting the development of authentic tourism experiences which bring our landscape and unique heritage to life in an invigorating, responsible and sustainable way.
- Looking after our people ensuring they have good jobs and that we engage good management practices.
- Transforming the way we work.



## 5. Our People & Culture, Our Values, Our Structure

Tourism NI's people strategy is based on the We Invest in People standard and we recognise that all our people have a part to play in delivering on strategic objectives. Our People Strategy prioritises having the right people with the right knowledge, skills and experience, working collaboratively in an inclusive, positive and supportive environment. Everything that Tourism NI achieves would not be possible without the commitment of all staff; their professionalism, determination and desire to make a difference. To ensure we continue to be a great place to work and one of NI's best employers, we:

- Ensure our people are proud of what they do.
- Encourage empowerment, engagement and accountability.
- Support our people to be flexible and agile in how and where they work.
- Communicate regularly and effectively with our people so they can see the connection between high-level plans and their jobs.
- Get the best out of people by providing clear structures and enjoyable work.

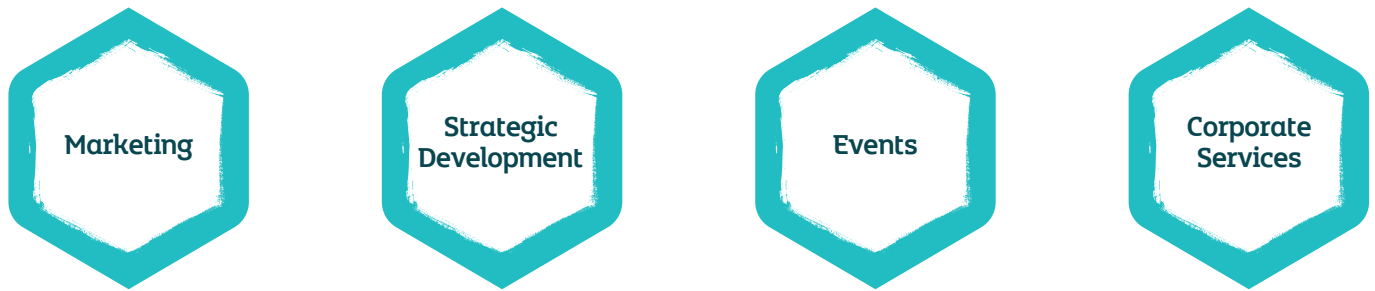
At Tourism NI our Organisational Values are at the heart of who we are, what we do and how we do it. We have four key Organisational Values that are represented by the acronym CARE. Our Core Values are:

	<b>Collaboration</b> Working together, sharing ideas and accountability across the organisation, ensuring we achieve together
	<b>Ambition</b> Creative in our thinking and bold in our actions, consistently striving to be the best versions of ourselves
	<b>Resilience</b> Supporting and empowering, welcoming opportunities to grow and learn
	<b>Excellence</b> Delivering a high quality and impactful service, always striving to exceed expectations and seeking out opportunities to make a difference



We **CARE** about our People, our Visitors, our Industry, our Communities and our Environment. In carrying out our roles, we must demonstrate HONESTY, acting with integrity, being truthful and ensuring our actions match our words. Through honesty, we cultivate a culture of RESPECT, recognising that every individual has something powerful to offer. This enables us to respect each other and embrace INCLUSIVITY, recognising different strengths, fresh thinking and empowering everyone to be authentic in the workplace.

Tourism NI's **organisational structure** is based on four directorates:



Our programme of delivery is organised by directorate as follows:

Marketing	Strategic Development	Events	Corporate Services
<ul style="list-style-type: none"> <li>NI destination marketing &amp; PR</li> <li>Social &amp; Digital Media</li> <li>ROI destination marketing &amp; PR</li> <li>Business Solutions</li> <li>Visitor Information</li> <li>Golf Marketing</li> </ul>	<ul style="list-style-type: none"> <li>Experience &amp; Industry Development</li> <li>Regions &amp; Investment</li> <li>City &amp; Growth Deals</li> <li>Quality &amp; Standards</li> <li>Corporate Communications</li> </ul>	<ul style="list-style-type: none"> <li>Major Events</li> <li>Event Development</li> </ul>	<ul style="list-style-type: none"> <li>People &amp; Organisational Development</li> <li>Financial Accounting</li> <li>Management Accounting</li> <li>Strategy &amp; Policy</li> <li>Digital &amp; Computer Services</li> </ul>



Our marketing activity is fundamental to creating consumer confidence and stimulating demand. This includes advertising campaigns, earned media coverage and public relations through to the [discovernorthernireland.com](https://discovernorthernireland.com) website and our social media channels and 'always on' activity. We work closely with the travel trade, tour operators and associations to put NI tourism businesses front of mind for buyers from overseas markets.

As part of our core function, we deliver a certification service to the tourism accommodation sector to ensure that we provide a recognised standard of product and service to our visitors. Tourism NI does not sell products or services – we work closely with tourism providers from all parts of the tourism ecosystem to build their capacity and competitiveness so that they can sell memorable, authentic experiences and services to customers. These providers are then able to maximise the opportunities available when NI hosts sporting or cultural events, often publicised on a global stage.



We work closely with Tourism Ireland in their promotion of NI outside the island of Ireland and also in ‘on the ground’ support for visits made by international media. We also work closely with Visit Britain through a Memorandum of Understanding.

In line with our core values, we will continue to collaborate with Councils, DMOs and representative bodies to support the development of the tourism industry. These are vitally important partners, and collaborative working is more important than ever to make the most effective use of our collective resource in times of constraints on public sector funding.

Tourism cuts across several policy areas and strategic remits, including those of the Department of Agriculture, Environment and Rural Affairs, the Department for Communities and the Department for Infrastructure. By its very nature of connecting people with place, tourism supports a range of both public policy areas and private enterprise activity including:

- Providing passengers for transport and supporting sea and air routes.
- Supporting the promotion of our unique culture, heritage and natural environment.
- Providing local and central government revenue; and importantly.
- Promoting Northern Ireland’s image overseas to generate investment.

As the tourism development authority for NI, Tourism NI plays a leadership role in working with the sector, stakeholders and partners across other government departments to ensure that the tourism ecosystem is fully functioning and that visitors experience a well-rounded tourism offer.

Underpinning all this external support, we operate as a publicly funded organisation employing around 150 people in Belfast and Dublin.





## 6. Policy Context

As an arm's length body of the Department for the Economy, Tourism NI operates within a dynamic government environment that directs our strategic priorities and ways of working. The importance of tourism is fully recognised by the government.

Tourism NI's Corporate Plan for 2025/28 is set in the context of key government policies and departmental plans.

### Minister's Economic Vision

In February 2024, the Economy Minister set out four key objectives as part of the Economic Vision:

Promote **Regional Balance** so that everyone, no matter where they live, should have the same opportunity to earn a living

Increase the proportion of working age people in **Good Jobs**

### Economic Vision

A fundamental driver of overall living standards is to **Raise Productivity**

Reduce Carbon Emissions in order to transition to a greener and more sustainable economy, generating prosperity for all.

The **Programme for Government 2024-2027 Our Plan: Doing What Matters Most** includes a key action to boost tourism's sub-regional impact through an innovative Tourism Vision & Action Plan: 10-Year Plan, promoting Northern Ireland as a great place to visit and generating sustainable and inclusive economic growth.

The **Department for the Economy Business Plan 2024-25** committed to setting up a Tourism Partnership Board (TPB), which was established in September 2024, to support the development and delivery of the Tourism Vision & Action Plan: 10-Year Plan.

The **DfE Sub-Regional Economic Plan** acknowledges the Tourism Vision & Action Plan: 10-Year Plan as the foundation for developing local action plans based on community strengths and potential. Through representation on the TPB, Tourism NI has been involved in this process.

DfE's **Tourism Vision & Action Plan: 10-Year Plan** was launched in January 2025 and aims to complement other key strategies and policies across various sectors.



## Department for the Economy Tourism Policy

Within the Tourism Vision & Action Plan: 10-Year Plan, two specific actions are identified that aim to ensure that departmental policies on tourist accommodation, support schemes and mechanisms are fit for purpose and ultimately to ensure that Northern Ireland has a thriving tourism sector.



## Transfer of Invest NI's tourism responsibilities to Tourism NI

The Invest NI review recommended that financial assistance for the development of tourist accommodation should transfer from Invest NI to Tourism NI. Work is progressing on the development of policy in this area as well as an assessment of the case for a new financial assistance scheme.

**ACTION:** Ensure that there is an adequate mix and scale of tourist accommodation across the North which meets visitor expectations. DfE will review its policy to support this and transfer the accommodation support scheme from Invest NI to Tourism NI.

## Review of tourism delivery mechanisms including the Tourism (Northern Ireland) Order 1992

All accommodation provision in Northern Ireland is currently subject to regulatory certification by Tourism NI as defined in the Tourism (Northern Ireland) Order 1992. The legislation was originally formulated to ensure that the accommodation provided in Northern Ireland met the expectations of the visitor. Since the last update of the Tourism Order in 2011, those expectations have changed substantially to a point where the legislation has potential to preclude development of the types of accommodation that visitors have come to expect. New forms of accommodation provision such as hosted accommodation through collaborative sharing economy platforms, budget hotels, boutique hostels and unique and alternative styles of property (for example, glamping, tree houses, yurts, and bubble domes) have shown the product landscape is continuously evolving, driven by consumer demand.

**ACTION:** Review tourism delivery mechanisms required to meet the future needs of the tourism sector, including the Tourism Order, funding schemes and delivery structures.

## 7. Department for the Economy Tourism Vision & Action Plan: 10-Year Plan: Goals



Tourism NI's role is to stimulate market demand from the island of Ireland. In 2023, overnight visitors from NI and the ROI accounted for £540m (44%) of expenditure, split evenly by market.

In terms of delivering against the Tourism Vision & Action Plan: 10-Year Plan Goal:



The vast majority (98%) of day trips are made by residents from within the island of Ireland, with this expenditure projected to grow by 36% also, to £1.5bn by 2035.

Revenue growth projections for overnight spend are 36% to over £700m in 2035 based on a growth rate of **2% each year to 2028 and 3% per annum thereafter for NI and a 10 percent value share of ROI trips on the island of Ireland.**

NI is promoted outside the island of Ireland by Tourism Ireland. In 2023, overnight visitors from outside the island of Ireland accounted for 56% of total expenditure. Tourism Ireland's growth target is 6.5% each year until 2030, slowing down in subsequent years, with overnight expenditure from international visitors planned to exceed £1.3bn by 2035.

**Tourism NI's Corporate Plan for 2025/28 and its constituent Operating Plans will therefore be aligned to the Minister's Tourism Vision & Action Plan: 10-Year Plan through those actions where Tourism NI either takes the lead or works in partnership with other bodies.**





## 8. Enablers to Support Tourism Northern Ireland meet its objectives

### All-Island Collaboration

Tourism NI has had close working relationships with Tourism Ireland and Fáilte Ireland in the past. These relationships have been further enhanced by the Minister's emphasis on 'considering opportunities that come from collaboration across the island of Ireland that will help to create a strong all-island economy and sustainable communities across Ireland'.

An all-island Strategic Tourism Group has been established and senior management teams from the three agencies and the sponsor Departments meet regularly to discuss work on sustainability, extension of Fáilte Ireland's brands, events and the Irish government's Shared Island programme.

### Local Network Building

Tourism NI currently works with a wide range of organisations across the UK and Ireland in meeting its objectives. In delivery of this Corporate Plan, we will strive to further embed collaboration with the sector, government and key strategic partners to bring benefits to the whole of NI. We will work together at a local, regional and national level to align strategic priorities, as well as working alongside the industry to ensure that local communities experience the benefits of tourism. We work closely with Councils at a sub-regional level to

ensure a consistent approach to tourism development across NI and, going forward, to ensure that the objectives of the Tourism Vision & Action Plan: 10-Year Plan are met. Building on existing relationships established as part of our work on the City and Growth Deals projects, we will play an increasingly important role in working with Councils to facilitate the development of destinations across Council boundaries where that is not happening effectively. Through our development of a Destination Management Framework for NI, we will provide direction and guidance to Councils and other stakeholders on how places can be developed and made more sustainable from a visitor perspective. We also need to collaborate closely with Councils so that we have a single and consistent brand for NI.

### Strategic Leadership through Stakeholder Engagement

As a public body we strive to ensure that we provide leadership to the tourism sector in all aspects of our role and functions. It is therefore vital that we deliver an effective Corporate Communications and Stakeholder Engagement Programme to protect and enhance the public profile of Tourism NI and underpin key projects and events.



## 9. Challenges to Tourism Northern Ireland and the Sector

### Remaining Competitive

Our ambition is for the Northern Ireland tourism sector to be 'an internationally compelling destination'. Competitor destinations continue to invest in new products and accommodation to meet the needs of increasingly discerning consumers. It is important that NI is also able to make capital investment in its tourism experiences, accommodation and infrastructure to remain competitive and thereby stimulate consumer demand.

### The Cost of Doing Business

The legacy of dramatic increases in energy costs and steep inflation remains a significant challenge for businesses and consumers alike. Businesses continue to incur high overheads across all cost areas and whilst they have been reluctant to pass these on to customers, they are now having to raise their prices. On the flip side, consumers are also being impacted through pressure on personal finances and reduced disposable income. This is reflected in our consumer sentiment monitoring where visitors are looking for more free things to see and do.

Whilst the NI tourism sector outlook is generally favourable for 2025, significant levels of concern remain regarding reduced disposable incomes and high energy costs. The increase in employer National Insurance contributions, the additional rises for the National Minimum Wage, the National Living Wage and business rates will all exacerbate cost pressures. The differential in VAT rates for NI and the ROI for food hospitality also provides a challenge.

This will have implications for us in how we support the sector in dealing with these issues but also how we stimulate demand with consumers to attract them to stay in NI for a short break, making the most of our tourism offer.



### Skills and Recruitment

Skills shortages and recruitment difficulties within the tourism and hospitality sector have been issues for many years. This has been particularly heightened by the pandemic, with many employees leaving the sector and not returning. Prior to the pandemic, the tourism and hospitality sectors had a reputation of offering a poor work/life balance with long working hours and conditions, and a lack of career progression opportunities. Brexit also impacted the sector due to new immigration rules.

We have made significant strides in addressing perceptions of the sector, in collaboration with key partners. However, with a tight labour market, an ongoing focus is required to communicate the career opportunities and positive changes in employer terms and conditions, to ensure that access to a skilled workforce does not restrict sustainable growth of the sector.



## UK Government Policy

The UK Government's Electronic Travel Authorisation (ETA) system is now fully implemented for all visitors travelling to the UK. Travellers coming into the UK via air and seaports will have to be in possession of an ETA linked to their passport. Visitors to NI however can come via the ROI; in fact, 67% of overseas visitors come to NI this way. The ETA will not be checked but it is a requirement to have one. Concerns have been raised by the sector about the impact that this might have, particularly on group travel and spontaneous day trips made by overseas visitors coming from Dublin, for example. Travellers must have a passport to get an ETA, so for Europeans who are used to travelling on ID cards and likely do not have a passport, this represents an additional barrier created by the ETA.

Tourism NI continues to liaise closely with DfE, Tourism Ireland, the NI Tourism Alliance, and the Home Office to ensure communications are as effective as possible.

## Tourism NI Budgetary Pressures

The Northern Ireland Executive continues to face significant budget challenges. In developing our

Corporate Plan, we have carefully considered where we can allocate our budget to ensure the greatest return on investment to support tourism growth and meet our obligations set out in the Tourism Vision & Action Plan: 10-year Plan. Single year budgets also prove challenging particularly when planning capital expenditure.

We continue to make the case for tourism, demonstrating the economic, social and cultural benefits that it brings for our region, our residents and our visitors.

## Technological Advances

Technological advances can be an opportunity as well as a challenge. The advancement and application of new technologies move rapidly. As consumers adapt to new technologies, travel and tourism businesses need to ensure that they use the latest methods of engaging with potential customers, alongside running their day-to-day operations.

Artificial intelligence (AI) is a disruptor for all industries, and it is critical that Tourism NI and the tourism sector embrace this technology to remain competitive. As an organisation, we have developed an AI Policy to ensure we use this technology in the correct way. We are also supporting the industry in helping them understand how best to use AI to grow their business.

It is important that as an organisation we are aware of the technological changes impacting both us and the sector and are agile enough to adapt and pivot as required.

## External Factors beyond our Control

Consumer confidence and demand can be impacted by many factors such as political instability, war, energy prices, recession, tariffs and low consumer confidence, not to mention a pandemic.

It is our role to support the industry to maximise opportunities and build skills and resilience so that in pressured times they have reserves to fall back on or can flex their activities to new markets and/or products.

# 10. Northern Ireland Visitor Economy - Performance Snapshot

## 2024 Tourism Performance

NISRA tourism performance statistics for 2024 indicated that:

- NI welcomed approximately 4.7 million overnight visitors in 2024, who stayed 14.9 million nights and spent £1.1 billion in NI.
- On average, visitors stayed 3.2 nights and spent £233 per overnight trip in NI in 2024.
- Holiday trips were the most popular reason for visiting NI, representing more than half of all visits.

## The Day Trip Market

NISRA official statistics indicate that the NI tourism day trip market was worth an estimated £703 million in 2024, with approximately 96% of visitors from the island of Ireland. Tourism NI will aim to convert a proportion of these day trip visits to overnight stays to encourage greater spend.

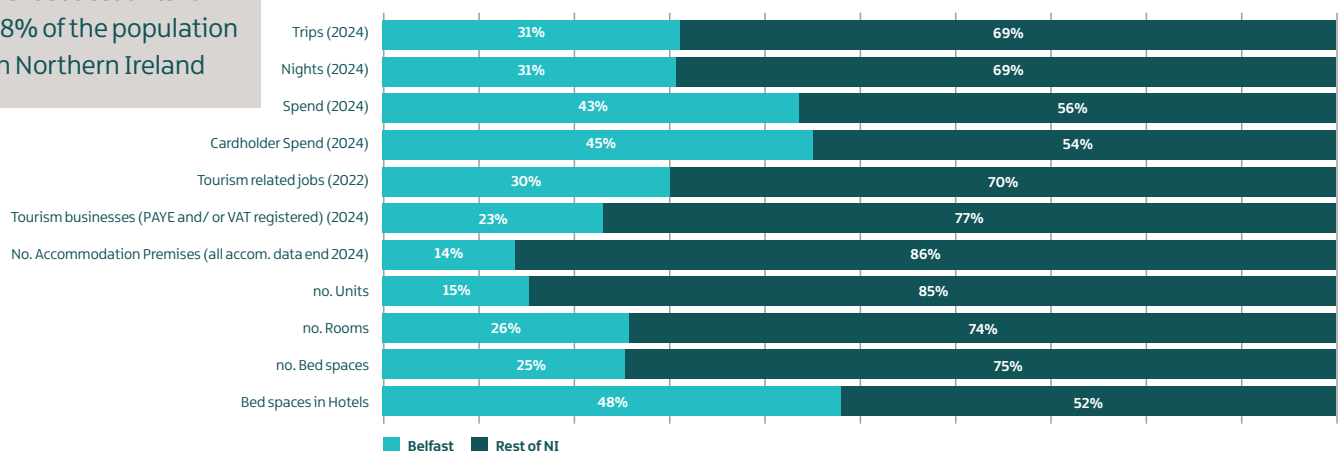
## Regional Spread

Belfast accounts for a disproportionate share of NI tourism activity across several indicators as demonstrated below:



Belfast accounts for 18% of the population in Northern Ireland

### Belfast vs Rest of NI



This profile reflects Belfast's pull to visitors as the biggest city, with all that it has to offer, as well as its role as the gateway to the rest of NI. Continuing to encourage the regional spread of tourism and its benefits forms a core part of this plan.



## Seasonality and Extending the Season

The peak months for NI tourism are July, August and September: 30% of visitors come in these months accounting for 31% of spend. A third of visits to visitor attractions are made over the same period. Seasonality also varies depending on a number of factors:

- Seasonality varies by market with 39% of all trips made by visitors from outside the Island of Ireland and GB taking place in July, August and September.
- One third of all holiday trips are also taken in these three months.
- Business trips are relatively evenly spread across the year with Visiting Friends and Relatives more frequent in the second half of the year.

The seasonal nature of the tourism industry in Northern Ireland presents the industry with a range of challenges including:

- Low productivity due to the comparatively low utilisation of assets outside of the high season.
- Difficulties in recruiting and retaining staff.
- Difficulties creating sustainable year-round businesses where the income is generated in a short period of time.
- Capacity issues at some attractions during the peak season leading to reduced levels of visitor satisfaction.
- Businesses outside of the main cities are dependent on the domestic market to survive the low season.





## 11. Embrace a Giant Spirit: Our Destination Brand



Since the launch of the 'Embrace A Giant Spirit' brand in 2019, we have seen the tourism industry and visitors resonate with its sentiment and essence. The brand was developed to promote NI as a visitor destination on the island of Ireland and strengthen Tourism Ireland's messaging overseas. This approach was crucial in helping NI to stand out amongst our competitors, to emotionally connect with its target market segments and communicate to the consumer the experience that they can expect if they choose to visit NI.

The brand is synonymous with a high-quality tourism offering and visitor experience, instantly recognisable as distinctively Northern Irish and has ensured the region has the ability to complement and stand on a par with the other experience brands on the island of Ireland. Our consumer sentiment research indicates that awareness of the brand has grown, and businesses find it an embodiment of NI which they believe in and can use to market their products and experiences.

We work closely with a growing Portfolio of innovative experiences and attractions committed to delivering on our brand inspirers and strengthening our destination appeal. This cohort benefit from increased account management and a tailored learning and development programme. Close to 100 businesses form part of this portfolio programme, representing both the top attractions driving initial interest and visit to NI, as well as smaller experiences, which help extend the stay and drive regionality

Alongside the Embrace a Giant Spirit brand, we will collaborate with Fáilte Ireland and Tourism Ireland over the timeline of this Corporate Plan to explore opportunities for NI tourism businesses to align with the Fáilte Ireland experience brands. This approach will allow us to build synergies and route development and support Tourism Ireland in marketing the island of Ireland overseas.

## 12. Tourism Northern Ireland - Market Focus

Tourism NI's mandate is to market NI to the domestic and ROI markets. In 2024, 42% of overnight spend in NI came from the island of Ireland.

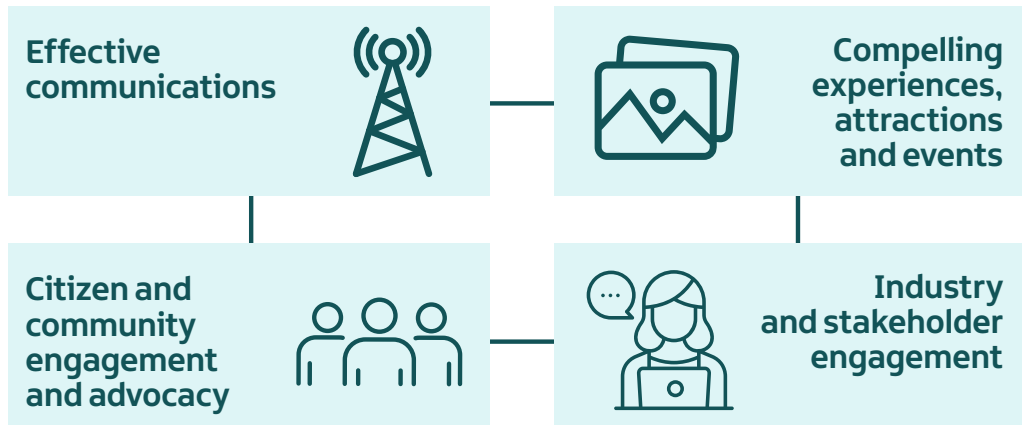
Our ongoing consumer sentiment indicates a consistently large majority of ROI and domestic visitors feel their trip matches or exceeds expectations, with the range of places to eat and drink and the welcome and hospitality being particularly highly rated by both markets. Overall, consumers in both markets continue to rate NI as a better 'value for money' tourism destination than ROI and GB, whilst competition from abroad remains strong.

## Domestic Market

**The domestic market has a significant positive impact on the regional and seasonal distribution of tourism.**

The NI Domestic Market Review was completed in early 2020, coinciding in an untimely way with the Covid-19 pandemic.

The strategy focused on four key pillars:



In recent years, as we recovered from the Covid-19 pandemic, the domestic market has provided a lifeline to the sector. The domestic market is stronger in delivering regional dispersal and season extension than all other markets and is the main market for many council areas.

In the same way that we focus our efforts on key market segments in the ROI market, we have three priority segments in the NI market, namely Aspiring Families, Natural Quality Seekers, and Social Instagrammers. These three segments represent the best opportunity to drive value growth within the domestic market.

In 2024,

- Domestic overnight stays accounted for 1.6m visitors, 33% of all visitors.
- Domestic visitor expenditure was £217 million, 20% of all spend by overnight visitors.
- Domestic breaks accounted for 3.6m nights in NI, 24% of all nights.
- Average spend per trip and spend per night was the lowest of all markets
- 51% of trips were holiday trips, 37% were visiting friends/relatives.



## Republic of Ireland Market

As our nearest neighbour, the ROI market has seen considerable growth and continues to demonstrate huge potential.

The economic value of visitors from the ROI is higher than those from NI, as they bring additional revenue, rather than recirculating existing money within the region. Priority marketing segments for value growth are: Active Maximisers, Indulgent Relaxers and Open-Minded Explorers.

The ROI Market Recovery Taskforce launched its growth strategy in 2017, and this was further refreshed in 2021.

The revised strategy focussed on three pillars:

**1.****Collective Effort**

Industry Engagement and Development, developing and supporting a motivated, engaged, connected and committed industry that is focused and equipped to win in the ROI market.

**2.****Compelling Communications**

Powerful messaging delivering consistent, connected and motivating communications that builds knowledge of what Northern Ireland has to offer and clear and compelling reasons to go.

**3.****Constant Purchasability**

Maximising conversion creating the conditions through which compelling and connected short break propositions (accommodation, attractions, experiences and events) are easily accessed and purchasable.

The strategy has been embraced by the industry and enabled by Tourism NI's targeted marketing campaigns and supporting activities, resulting in the market making a bold recovery from the Covid-19 pandemic. Evaluation of our focused marketing campaign activity in ROI reveals a strong return on investment. Consumer sentiment research has indicated that after the launch of the strategy, approximately half of NI's visitors from ROI were visiting for the first time, presenting an opportunity to attract these visitors for a return visit.

In 2024,

- ROI accounted for 1.1m visitors to NI, 24% of all visitors.
- ROI visitor expenditure was £243 million, 22% of all spend by overnight visitors.
- ROI visitors spent 2.5m nights in NI, 17% of all nights, staying an average of 2.2 nights per trip.
- Average visitor spend per night was 63% higher for ROI visitors than for NI residents taking an overnight break in NI.
- The ROI market is stronger for regional dispersal than other out of state markets.
- 47% of trips are visiting friends/relatives, 35% are for holidays.
- NI attracted 6.4% of the overnight trips made by ROI residents within the island of Ireland.

Alongside focusing on the domestic and ROI markets, Tourism NI works closely with Tourism Ireland to optimise opportunities in the most important markets outside of the island of Ireland, particularly GB, North America and mainland Europe.



Our role in product and industry development, in particular, is critical to providing more reasons for visitors to visit NI, stay longer and deliver positive impacts.



## 13. Strategic Objectives

The following section sets out the main initiatives that Tourism NI will deliver in the next three years under each of the five Strategic Objectives. Several initiatives can deliver against more than one objective and where this occurs it is highlighted, e.g. + Productivity. Those actions where Tourism NI takes the lead or works in collaboration with partners, which are detailed in the Tourism Vision & Action Plan: 10-Year Plan, are also highlighted, e.g. (Action 4).



### Objective 1: Regional Balance

**Outcome: 'Regional Balance** - a balance between urban, rural, and coastal destinations - ensuring that investment and economic activity is spread broadly across Northern Ireland, and not overly concentrated in the capital city of Belfast and a concentration of honeypot areas.... **Regional Balance is not about displacement – it is about generating new growth.'**

A primary objective of the Minister's economic and tourism vision is 'regional balance.' This is not seen as a redistribution of existing business, but rather that the value of tourism in the regions outside of Belfast will grow at a faster pace than before.

Tourism is one of the most regionally balanced sectors within the local economy with 70% of jobs based outside Belfast. Outside of employment, Belfast dominates by every measure, as capital cities tend to do, given that they typically have the scale, infrastructure, cultural facilities and a nighttime economy that meets the needs of the visitor. From a tourism perspective, market forces and tourism infrastructure will continue to drive business towards Belfast, particularly for first time visitors to NI.

Through maximising existing assets in rural, urban and coastal locations, as well as innovative itineraries and

partnership collaboration, we can create an opportunity to slow down travel, encouraging visitors to stay longer and spend more. In so doing, growth in tourism income and good tourism and hospitality jobs will be better spread across Northern Ireland.

### Stimulating Demand

Promoting NI as a must-see destination for consumers is a core element of what we do. Our efforts and finite budgets need to be optimised across an appropriate range of media to expand our reach and share of voice to ultimately move the customer through the purchase funnel to book a trip.

Our marketing in the ROI over recent years has resulted in approximately 50% of visitors from ROI visiting NI for the first time. Continued investment in our focused marketing to the key segments in this market will aim to repeat visitation thereby promoting growth outside Belfast.

We know that the domestic market is important for delivering regional balance, but we need to ensure that staycations are kept front of mind to compete with short breaks in ROI and abroad.



## Destination and Product Development

In the DfE Sub-Regional Economic Plan, we are mandated to take a destination-led approach through the development of local action plans based on community strengths and potential. These Destination Stewardship Plans will form the bedrock of our 'regional balance' approach. In our use of the term 'destination,' we mean a defined geographical area with reasons to visit, stay and spend, supported by a strong tourism ecosystem. Destinations will possibly not be congruent with Council boundaries so it will be important that Councils work in collaboration with us to deliver these plans.

It is important to recognise that different destinations are at various stages of development and so each requires its own development plan. We must keep in mind the true potential of each destination, as the aim is not to get all of these on a level playing field but rather to maximise the growth potential of each area. Having key attractors with supporting experiences is therefore important to driving visitor spend and distribution. This is also an important factor in driving repeat visits.

The aim is that the City and Growth Deal projects will increase the number and distribution of key attractions, with a further phase of the Experience Development Programme supporting the breadth of the offer of authentic experiences.

Underpinned by our Embrace a Giant Spirit brand, we support the development of authentic tourism experiences which bring our unique heritage to life in an invigorating, responsible and sustainable way. We have developed Visitor Experience Development Plans for Food & Drink, for Culture, History & Heritage and for Outdoor & Activities. This is proving to be an effective way to engage with businesses and stakeholders across the region.

Tourism is one of the success stories coming out of the Good Friday Agreement. Visitors want to learn more about our recent history, which creates the opportunity to grow peace tourism and tell our unique story. This opportunity is identified in the Tourism Vision & Action Plan: 10-Year Plan.





## Economic and Industry Development

In terms of niche sectors, screen tourism and the luxury market can be further developed and maximised. NI's recognition as a location for global TV programmes and films, in particular Game of Thrones and Derry Girls, continues to provide us with the opportunity to attract visitors from across the globe. The luxury end of the market is one that we can develop and enhance, working in collaboration with sector partners and providers of luxury accommodation and experiences.

NI's reputation as a world class golf destination goes from strength to strength, with Royal Portrush hosting the 153rd Open Championship in July 2025 – the second time it has done so in six years. Attracting golf visitors, who stay longer and spend more than average, helps to spread economic benefits across the region.

## Cross Border Collaboration

A number of our workstreams involve working with Fáilte Ireland, Tourism Ireland, and other partners across the border. We have been involved in bidding for Shared Island funding including the Wild Atlantic Way / Causeway Coastal Route Programme that is currently underway. Other collaborative activities include Meet the Buyer, familiarisation trips for journalists and tour operators and a shared content pool. We are working with Fáilte Ireland and Tourism Ireland to explore opportunities for NI tourism businesses to align with the Fáilte Ireland experience brands.

## Major Events, Event Development and Delivery

Events have played a significant role in the growth of Northern Ireland's tourism industry in recent years. Large scale events such as the Giro d'Italia, the MTV European Music Awards and The Open Championship at Royal Portrush have had a positive impact on the perception of Northern Ireland in overseas markets. Together with our home-grown events that have an appeal to overseas tourists, these have contributed to greater visitor numbers, increased visitor spend, extension of the season and sustained employment in the local tourism and hospitality sectors across Northern Ireland. In addition to the direct tourism benefits, a balanced portfolio of festivals and events can deliver significant social and cultural impact.

Major events such as The Open, which we have existing infrastructure to deliver, act as important anchors in our mid to longer term events programmes. Active targeting of a major event every two to three years would be integral to this ambition. Where it is possible to do so, operating on an all-island basis to develop a festival series, clustering together activity which is already taking place and thereby reducing costs of promotion, are options to be considered, as are new sources of funding.



## Success will be recognised as:

Tourism NI continuing to support the regional growth of tourism, resulting in:

- Well-defined destinations - each with a standout tourism hub or hubs including accommodation, visitor experiences and an evening economy.
- Tourism providers who represent our unique identity, customs, traditions and ways of life across NI.
- Tourism businesses that are equipped with the right skills to maximise opportunities.
- Investment in tourism infrastructure, events, experiences and services that deliver measurable benefits for residents, communities and tourism providers – this is optimised through a regular review of funding sources.
- Clusters within NI destinations: collaborating to maximise social and economic opportunities via sustainable tourism development.
- A year-round calendar of experiences and events driving seasonal bookings and a major event every 2-3 years to raise Northern Ireland's profile.
- The tourism industry delivering on the Embrace a Giant Spirit brand promise and exceeding visitor expectations.
- Effective stakeholder collaboration between Tourism NI, Tourism Ireland and local authorities to maximise opportunities.

Key Metric/ Indicator	Source
<ul style="list-style-type: none"> <li>• Percentage growth of tourism value by council area year on year</li> <li>• Average length of overnight stay and spend per trip</li> <li>• Economic benefit derived from Major Events</li> <li>• Percentage marketing campaign content outside Belfast</li> </ul>	<ul style="list-style-type: none"> <li>• NISRA tourism performance statistics</li> <li>• NISRA tourism performance statistics</li> <li>• Event evaluation studies</li> <li>• Tourism NI Marketing Budget</li> </ul>

## Initiatives by Workstream

### Stimulating Demand

- Promote NI as a short-break destination in the domestic and the ROI markets through integrated marketing campaigns that drive visitor growth and revenue and support regional and seasonal balance. **+ Productivity**
- Continue to deliver discovernorthernireland.com, to inspire and drive interest and visits to Northern Ireland as a destination.
- In collaboration with Tourism Ireland, promote Northern Ireland in overseas markets through international media familiarisation (fam) trips.
- Support Tourism Ireland to promote sustainable tourism experiences in overseas markets.

### Destination and Product Development

- Lead the development of stewardship plans for priority tourism destinations across NI, building on existing collaborative working with Councils and other key stakeholders. **(Action 4)**
- Oversee and support the successful delivery of the major new tourism investment projects identified within the four City and Growth Deals across NI on behalf of DfE. **+ Good Jobs (Action 8)**
- Develop new capital investment and development programmes to support new and enhanced tourism experiences drawing on the recommendations of the NI Product Review. **(Action 3)**
- Deliver an effective service for the certification and grading of visitor accommodation and visitor experiences to drive quality and good practice across the sector.
- Review the future regulation and classification of the visitor accommodation sector to inform DfE and related policy areas.



- Encourage investment in, and the provision of, new and enhanced visitor accommodation which can support growth in visitor spend and regional spread across NI. **+ Good Jobs (Action 6)**
- Support the development of innovative tourism experiences to underpin our brand proposition, with a particular focus on those businesses with significant growth potential, and the regional development of experiences in Food & Drink, Culture & Heritage and Outdoor & Activities. **+ Productivity**
- Define and deliver a shared approach to realising the potential of Peace Tourism, in partnership with key stakeholders. **(Action 2)**
- Continue to optimise the potential of Screen Tourism to secure added value.
- Lead an NI development plan for the luxury segment in order to capitalise on opportunities in this area.

### Economic and Industry Development

- Deliver the NI Golf Tourism Strategy including a programme of B2B Golf sales missions.
- Develop a Travel Trade Strategy to maximise revenue for Northern Ireland.
- Develop and deliver an industry focused Accessible & Inclusive Tourism Programme. **+ Productivity + Sustainability**

### Cross Border Collaboration

- Collaborate with Fáilte Ireland and Tourism Ireland to explore opportunities for NI tourism businesses aligned to the Fáilte Ireland experience brands. **+ Productivity (Action 9)**
- Work in partnership with Tourism Ireland and Fáilte Ireland to deliver a programme of activity to build synergies, brand collaboration and route development. **+ Productivity (Action 9)**
- Working with partners, develop and deliver an innovative B2B programme of sales and marketing activity to support the NI tourism industry to increase programming from international operators. **+ Productivity**

### Event Development and Delivery

- Develop a strategic approach to support the development of a long-term programme of events for the North capable of contributing to the delivery of the Minister's economic vision to maximise the benefits to NI and support the ambitions set out in the Tourism Vision to 2035. **(Action 7)**
- Deliver a Tourism Events Support Programme which will enhance the destination profile, increase visitor numbers and bednights from key markets, increase spend and encourage regional spread. **+ Productivity**

## Objective 2: Good Jobs

**Outcome:** 'Good Jobs that offer secure, flexible, rewarding employment with supportive employers, offering opportunities for skills development and career progression where wellbeing is valued.'

Good Jobs is a critical objective of the Minister's Economic Vision. The Minister sees tourism and hospitality as having the potential to provide meaningful, fulfilling employment opportunities across NI and in doing so help tackle our chronic economic inactivity challenge and help sustain both rural and urban communities across the region.

**DfE** has defined a 'good job' as one that offers an employee of working age, which is between the ages of 16 and 64, the following:

- A permanent contract; and
- A non-zero-hour contract; and
- Earning the Real Living Wage or more.

The tourism skills landscape is complex and fragmented, with no 'one size fits all' approach. We therefore need to focus our limited resources where we can generate the greatest impact. Tourism NI's activities are therefore clearly focused on the areas of skills development and industry support.

Tourism NI has developed partnerships with organisations which are working to encourage pupils in schools to think about tourism as a career opportunity. Many larger hotels and visitor attractions are highly active in this area, engaging with third party people accreditations including Investors in People and Great Places to Work as well as delivering innovative in-house bespoke initiatives.

The Minister's Tourism Vision & Action Plan: 10-Year Plan commits Tourism NI to develop and deliver an Employer's Excellence Programme, drawing upon the successful Fáilte Ireland programme. The Plan also commits Tourism NI to work in partnership with industry and DfE Skills Division to deliver a bespoke Skills Action Plan to address skills gaps and improve career pathways.

The connection between good jobs, staff that are well-supported and content and satisfied customers is fundamental to a successful tourism industry.

#### Jobs in Tourism:

- 5,865 VAT and/ or PAYE registered businesses, 70,384 jobs equating to 9% of all jobs in NI
- 70% of these jobs are located outside the Belfast City Council area.
- The top three employment sub-sectors are restaurants (42%), hotels (15%), and beverage outlets (9.9%)
- 56% of those employed are under 35 years of age.
- 50/50 split male/ female (pre 2023 there was a higher proportion of females employed)
- Average pay for those employed in the tourism sector is lower than the Living Wage and the NI average.



## Skills Development and Industry Support

The recruitment and retention of good people continues to be a challenge for our sector. These challenges are increased because of a longstanding perception of the sector as being one which typically offers low pay, long unsociable hours and limited potential for career progression. Our very competitive labour market further exacerbates this, with an unemployment rate of 1.7%. However, tourism is well placed to help tackle the challenge presented by 27% of NI's working population being economically inactive.

As a result of Brexit, the sector has had recruitment challenges due to the loss of thousands of workers from Eastern Europe. The salary levels that overseas workers require in order to secure a visa represent a barrier to recruitment of foreign nationals.

In response to the industry's needs, Tourism NI has expanded its Industry Development activities in recent years to help change perceptions of the sector and to support businesses with recruitment, retention and staff development. This has been done in partnership with a range of stakeholders including the HATS Network, Hospitality Ulster, the Further Education network and the two Universities.

The most notable of these has been the 'Make it Here' campaign which has sought to change perceptions of the sector by dialling up its positive attributes and help employees to change the lived experience of working in Tourism and Hospitality, ensuring that the sector becomes a best-in-class employer. Our research indicates that this campaign is improving perceptions of the sector.

## Success will be recognised as:

Tourism NI continuing to promote and support good jobs in tourism, resulting in:

- Attracting, developing, and retaining people across all skills levels, all backgrounds and from all parts of Northern Ireland.
- Pay, terms and conditions in the tourism and hospitality sector improving and offering flexibility.
- Increased positive perceptions of the tourism and hospitality sector.
- More people employed in the tourism and hospitality sector.
- Growth in skill levels and capability of the workforce.

Key Metric/ Indicator	Source
<ul style="list-style-type: none"> <li>• Number of jobs in, and Work Quality Indicators for tourism and hospitality</li> <li>• Percentage of respondents who: <ul style="list-style-type: none"> <li>• have positive perceptions of the tourism and hospitality sector</li> <li>• consider that tourism and hospitality will grow as a provider of permanent jobs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• NISRA</li> <li>• Tourism NI Perceptions Survey (omnibus)</li> </ul>

## Initiatives by Workstream

### Skills Development and Industry Support

- Support DfE in the development and delivery of a Tourism Skills Action Plan which can provide a blueprint for collective activity over the next 10 years. + **Productivity (Action 10)**
- Continue to promote tourism careers in order to support employee recruitment and retention across the sector.
- Build individual and team capability and expertise and embed good practice in employee development across the sector.

## Objective 3: Increased Productivity

**Outcome:** a competitive tourism industry that offers a compelling proposition is innovative, and maximises resources and the potential of our assets throughout the year.

Supporting the Increased Productivity objective will ultimately require the creation of new jobs and the growth of existing businesses, which will result in greater levels of employment across the region.

The sector currently employs over 70,000 people across 5,845 VAT/ PAYE registered businesses. This however excludes many people within the sector who are sole traders / self-employed as tour guides, drivers, and activity / experience providers for example. Like the broader NI economy, the tourism sector is dominated by small and micro-enterprises (90%) with the top

10% of businesses generating an estimated 80% of all bookings. The majority of small business owners are driven by their passion and not necessarily by a desire to grow employment, which presents a challenge in encouraging increased employment.

The range of businesses does however provide breadth to the tourism offer and 98% of holidaymakers see this as an important factor in their choice of holiday location.

### Industry Capacity Building

Tourism NI takes a multi channelled approach to industry development and capacity building:

- The Tourism Enterprise Development Programme is an important mechanism whereby we provide



online support, webinars and workshops that are open to all tourism businesses.

Based on industry feedback the themes covered address current issues and topics that the sector sees as important. Latterly, sustainability, innovation and digitisation including Artificial Intelligence (AI) have been the focus.

- 'Always on' business support is especially important for small businesses and the 'My Tourism NI' E-learning platform developed in partnership with industry practitioners goes some way to providing practical learning materials in this way.
- Working on a 'One to Many' basis with smaller experience providers with the greatest growth potential. We have adopted a particular focus on Food and Drink, on Culture and Heritage and on Outdoor Experience Providers through the Embrace a Giant Spirit Portfolio.
- For major tourism providers, such as leading attractions, we take an organisation-wide approach where different teams from Tourism NI will engage on different workstreams with staff in the respective tourism business.

## Innovation in Tourism

Improving Productivity is an important strand of any economic development strategy. Higher levels of innovation tend to lead to greater use of resources, increased income levels and a higher standard of living within a region. This tends to be driven by increased automation, which is difficult to deliver in a people-centric industry such as tourism. However, innovation in the tourism sector can come about through new product development and the greater utilisation of existing assets.

## Growing Business Events and B2B Sales

Regional programming of MICE (meetings, incentive, conferences and events) business across NI and promoting the delivery of business events, predominantly bringing business into Belfast and Derry contribute to both Regional Balance and Productivity. Business conferences for example tend to be held midweek and outside the peak season, which gives a

greater return on investment for hotels and restaurants thereby supporting business survival and productivity.



Our work in these areas is conducted in collaboration with partners including the DMOs and Tourism Ireland, thereby ensuring opportunities emerging from international markets are maximised.

## Success will be recognised as:

Tourism NI working with the industry, resulting in:

- Increased investment in new and existing innovative businesses.
- Tourism revenue growing faster than visitor numbers, with visitors staying longer and spending more.
- NI being perceived as an attractive place to work, live in, visit and invest.
- Tourism revenue being more evenly spread across the year (through growth of the shoulder season) thereby providing workers with secure employment, increasing business survival rates and profitability.
- Tourism businesses engaging in strong management practices for efficient use of existing resources.
- Increasing take-up of tourism industry platforms to support sales growth.
- NI being recognised and winning more business as a leading business meeting, incentive, conference and events location for our key NI growth sectors.
- NI being recognised for its golf, luxury and peace tourism offer.

Key Metric/ Indicator	Source
<ul style="list-style-type: none"> <li>ROI market overnight spend value</li> <li>Percentage annual tourism spend in shoulder season</li> <li>Number of tourism businesses holding an Innovate NI related accreditation</li> <li>Conference and business meeting economic benefits</li> </ul>	<ul style="list-style-type: none"> <li>NISRA tourism performance statistics</li> <li>NISRA tourism performance statistics</li> <li>Tourism NI Innovate Tourism Growth Programme monitoring</li> <li>Visit Belfast and Visit Derry</li> </ul>

## Initiatives by Workstream

### Industry Capacity Building

- Work in collaboration with Tourism Ireland / DMCs and stakeholders within the industry to help them to secure Incentive Business and Corporate meetings for operators. **(Action 12)**

### Innovation in Tourism

- Deliver an Innovate Tourism Growth Programme aligned to the Innovate NI framework.

### Growing Business Events and B2B Sales

- Work with Visit Belfast and Visit Derry to deliver recommendations within the Business Tourism Strategy that support the industry in securing conferences and business meetings for NI, and to support cruise tourism. **(Action 12)**

## Objective 4: Sustainability

**Outcome:** A tourism industry that is economically, environmentally and socially sustainable

The climate crisis and loss of biodiversity globally is leading to an increasing demand for more environmentally and socially sustainable tourism experiences. As a result, there is a need for destinations to promote themselves as sustainable to secure business in the future.

The UN Sustainable Development Goals (SDGs) set the standard for sustainability as they strive for a better and more sustainable future for all through economic growth, reducing poverty, supporting cultural heritage and environmental sustainability. In addition to consumer demand, being able to demonstrate that our destinations, venues and experiences are aligned to the values of corporate and industry associations' Environmental, Social and Governance (ESG) strategies is critical to securing conference and incentive business.



Sustainable tourism is defined by the UN Environment Programme and UN World Tourism Organization as: 'Tourism that takes full account of its current and future economic, social and environmental impacts, **addressing the needs of visitors, the industry, the environment and host communities.**'

From a legal perspective, the Climate Change Act (NI) 2022 requires NI to become carbon neutral by 2050 and the Tourism and Hospitality Sectors have a role to play in this.

## Reducing the Sector's Carbon Footprint

Our work in this area in collaboration with Fáilte Ireland and Tourism Ireland to develop an All-Island Sustainability Mark has been paused as we consider the implications of the EU Green Claims Directive. In the meantime, Tourism NI is working with Fáilte Ireland in the development of a toolkit which will allow tourism businesses across the island to measure their carbon footprint in a consistent manner. We have been able to expand our Sustainable Tourism Business Programme, now accredited by Ulster University, which aims to embed sustainability action plans and create regional cohorts of sustainable tourism businesses. Given the importance of this area of work, external funding sources are being explored to develop new carbon reduction programmes.



## Success will be recognised as:

Tourism NI supporting the sector and promoting Northern Ireland, resulting in:

- The sector being recognised as sustainable in economic, social, and environmental terms.
- Tourism businesses being financially sustainable.
- Businesses effectively responding to climate change and reducing their carbon footprint.
- Regional dispersal and seasonal growth underpinned by sustainable destination management plans that attract investment.
- Our natural and built environment being considered attractive by visitors.
- Tourism's impact on the environment being managed.
- NI residents and communities welcoming tourists and seeing tourism as making a positive contribution to their area.
- Tourism providing a range of financial and non-financial benefits to local areas and communities.
- Tourism experiences, attractions and accommodation that are accessible by all.

Key Metric/ Indicator	Source
<ul style="list-style-type: none"> <li>• Number of businesses participating in Climate Action Programme initiatives</li> <li>• Tourism seen as bringing benefits to local residents and communities</li> </ul>	<ul style="list-style-type: none"> <li>• Tourism NI Climate Action Programme monitoring</li> <li>• Tourism NI Consumer/ Community Survey</li> </ul>

## Initiatives by Workstream

### Reducing the sector's carbon footprint

- Deliver a Climate Action Programme to embed good practice across the tourism industry. **(Action 16)**
- Work in partnership with Fáilte Ireland and Tourism Ireland to develop a sustainability accreditation scheme or alternative in order to drive climate action and showcase the destination. **(Action 17)**



## Objective 5: Strong Organisational Capability

**Outcome:** Tourism NI is an effective, diverse, innovative and impactful organisation for which people are proud to work.

To deliver the objectives set out in the Tourism Vision & Action Plan: 10-Year Plan, it is important that Tourism NI has the relevant resources, talent, skills and processes efficiently deployed within the organisation.

### People & Organisational Development

We recognise that our people are our greatest asset and as an organisation we have developed and maintain a strong people-centric culture. Our People Strategy prioritises Tourism NI having appropriately skilled, knowledgeable and experienced people who can work together and thrive in an inclusive, positive and supportive environment.

### Finance, Governance & Procurement

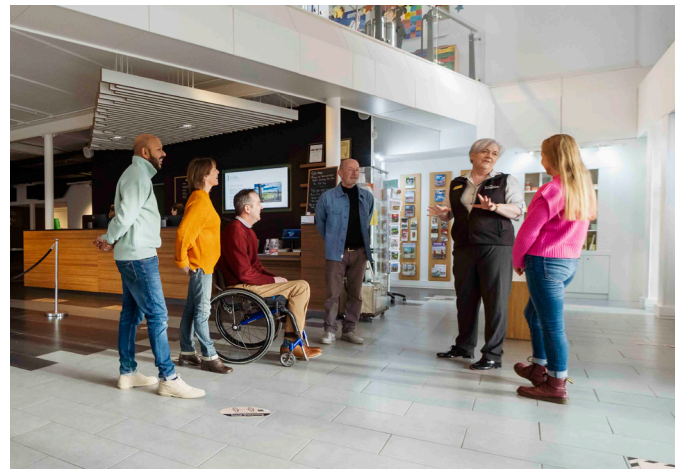
It is important that the legislative framework within which Tourism NI operates gives it the necessary powers to deliver the types of support required to fulfil its objectives. We must also have robust governance arrangements in place, manage risk effectively and provide assurance that we can fulfil our obligations as a public body and deliver value for money.

### Digital & IT Services

Tourism NI leverages technology to ensure we are an effective and efficient organisation and that our systems are compliant with regulatory requirements. As a business implementing a hybrid working policy, we ensure that our staff have the necessary tools to achieve our corporate objectives. With technological changes come opportunities and threats – AI provides an opportunity for us as an organisation and for the tourism industry. We implement sophisticated cyber security tools to protect our information and infrastructure.

### Communications & Stakeholder Engagement

As the national authority with responsibility for developing tourism in Northern Ireland, we hold a leadership role for the sector. This requires us to engage effectively with stakeholders, to protect and enhance the public profile of Tourism NI, to act as advocates for the development of tourism and to leverage resources and maximise opportunities.



### Strategy & Policy

We use data and insights to inform our decision making at many levels and we share this information with tourism businesses and stakeholders to support their own decisions about planning, product development, marketing and investment. We listen to both consumers and the industry to ensure that the needs of the visitors can be met, and their expectations can be exceeded. We are working to enhance our provision of data and insights through the development of the Tourism & Research Insights Platform (TRIP) – a ‘one stop shop’ for tourism insights that will service the sector, stakeholders and investors with multi layered information and intelligence.

Our newly developed ESG Framework sets out the ways in which we operate internally as an organisation, including working on reducing Tourism NI's carbon footprint, and externally with our stakeholders. These three strands give an added positive perspective and dimension to our activities.

## Success will be recognised as:

Tourism NI:

- Attracting, retaining and developing a highly motivated workforce whose work demonstrates our company values and culture.
- Being a sustainable organisation.

- Being innovative and using technology to improve our productivity.
- Deploying good management practice and governance ensuring our stakeholders' and partners' expectations are met through delivery of effective corporate governance, finance and procurement arrangements.
- Managing risk: effectively identifying and mitigating risks.
- Being well regarded by its stakeholders.
- Being recognised as the authoritative source of NI tourism insights and intelligence.



## Initiatives by Workstream

### People & Organisational Development

- Implement the Tourism NI People Strategy in response to industry demands, market conditions and technological change.

### Finance, Governance & Procurement

- Ensure compliance with all DoF financial, governance guidance and risk management processes.
- Work with DfE in the development of a new funding scheme, which includes provision for Selective Financial Assistance. **(Action 5)**
- Explore ways of sharing Shared Services with other DfE ALBs in consultation with DfE.

### Digital & IT Services

- Provide Digital & IT services to enable staff to deliver the Corporate Plan objectives.
- Improve information management methodology to deliver continuous improvement and compliance, and exploit AI technologies to improve organisational efficiencies.

### Communications & Stakeholder Engagement

- Deliver a comprehensive communications and engagement plan to increase understanding of the impact of the organisation's work and the contribution of the tourism sector to the NI economy and local communities.

### Strategy & Policy

- Deliver a high quality, robust evidence base for TNI, industry and stakeholders to help inform policy and strategy development and operational decisions.
- Implement the ESG Framework for Tourism NI.



## 14. Monitoring and Assessing our Performance

Tourism NI's overarching aim for this three-year Corporate Plan can be measured by the NISRA tourism performance statistics as used by the Department for the Economy in monitoring performance against the Tourism Vision & Action Plan: 10-Year Plan.

Our annual Operating Plans contain the specific KPIs that each of the initiatives will be measured by. These KPIs are both output and outcome based depending on the nature of the initiative. Each initiative within the plan is owned by a Directorate and Team who are responsible for delivery and reporting on progress on a quarterly basis. Individual Teams develop an annual Unit Plan to manage their workstreams across potentially multiple initiatives. Through the annual Performance Review process, individual team members have annual performance objectives that align with team, directorate, and ultimately corporate objectives.

Managers, Heads of Departments and Directors provide quarterly performance reports for their areas. These reports are reviewed and approved by the Executive Leadership Team (ELT) and are submitted to the Board for approval. The reports are discussed as a standing agenda item with DfE officials at the quarterly Oversight and Liaison meetings.

Our Annual Report details a review of our performance and achievements made during the year based on our main areas of work.

Tourism NI's Corporate Risk Register is aligned to the objectives in the Corporate Plan and Operating Plan to ensure that any risk or uncertainty linked to delivery is identified, managed, and effectively controlled or mitigated where possible. Corporate Risks are initially identified by the ELT and agreed with the Tourism NI Board. The Risk Register is formally reviewed and updated each quarter and reported to Tourism NI Board, the Audit and Risk Assurance Committee and DfE.

