

Northern
Ireland
Embrace
a Giant
Spirit



Experience Development Roadshows



Tourism NI Product Review

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TOURISM
NORTHERN
IRELAND



What's it all about?

Where are we now?

Where could we be?

How do we get there?

What's it all about?

A Co-designed Process

It's not about re-inventing the wheel ... it's about enhancing what we already have!

"A holistic linked up approach across the sector is needed and we're already doing it better than some other industries."

"We've turned away so much business because the infrastructure just isn't there yet. It'd break your heart."

"Diversity of product and strategic dispersal of our audience through multipurpose events and venues is key."

"It is imperative that we must first and foremost de-risk tourism products & champion an interactive process."

OVER 100
people engaged through...

65

Provider Survey Responses

3

Council & Stakeholder Insights Workshops

3

Internal Giant Spirit Get-Togethers

2

International Destination Conversations

Where are we now?

Product and Experience Review

Collective Regional Overview



Regional Tourism Product Count
1250 ...and growing
Tourism Employment Statistics
1 in 10 ...employed in Tourism

Regional Share of Tourism Product		Regional Share of Tourism Segments	
High	Newry, Mourne & Down 199	High	Outdoor Recreation 202
	Causeway Coast & Glens 188		Adventure & Sports 121
	Belfast 172		History & Heritage 115
	Golf Tourism 105		
Low	Antrim & Newtownabbey 44	Low	Culture 13
	Lisburn & Castlereagh 51		Wellbeing 24
	Mid Ulster 65		Food & Cookery 27
	Cycling 28		

Where are we now?

Product and Experience Review

Upcoming Tourism Product and Experiences:



1
The Gobbins (Phase 2)

Improved facilities for building capacity and visitor experience



2
Belfast Stories

A new flagship tourism project for telling the NI story



3
Destination Royal Hillsborough

Uplift of current heritage offering as world class product



4
Carrickfergus Regeneration

New tourism hub for heritage site as key anchor site of coast



5
NMNI Ulster American Folk Park

Omagh uplift for improved access to heritage



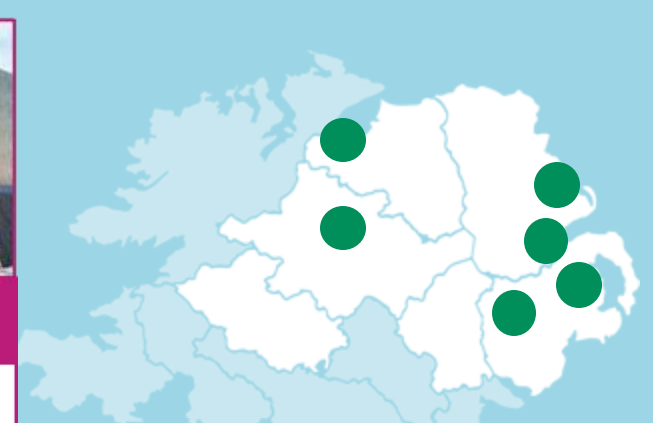
6
Mourne Mountains Gateway

A world class sustainable tourist destination for the Mournes



7
Derry on the North Atlantic

DNA will be an Iconic hybrid museum offering for Derry



* These projects are at different stages of development and approval. This is not an exhaustive list and is only a representative sample of information made available online or during the workshop phase of this research.

Where are we now?

Inspiring a shift in perspective

Case Studies of Shared Impact
The Gobbins Visitor & Community Centre



Delivering on UN
Sustainability Goals



Where are we now?

Inspiring a shift in perspective

Case Studies of Shared Impact
The 148th Open Championship at Royal Portrush



Delivering on UN
Sustainability Goals

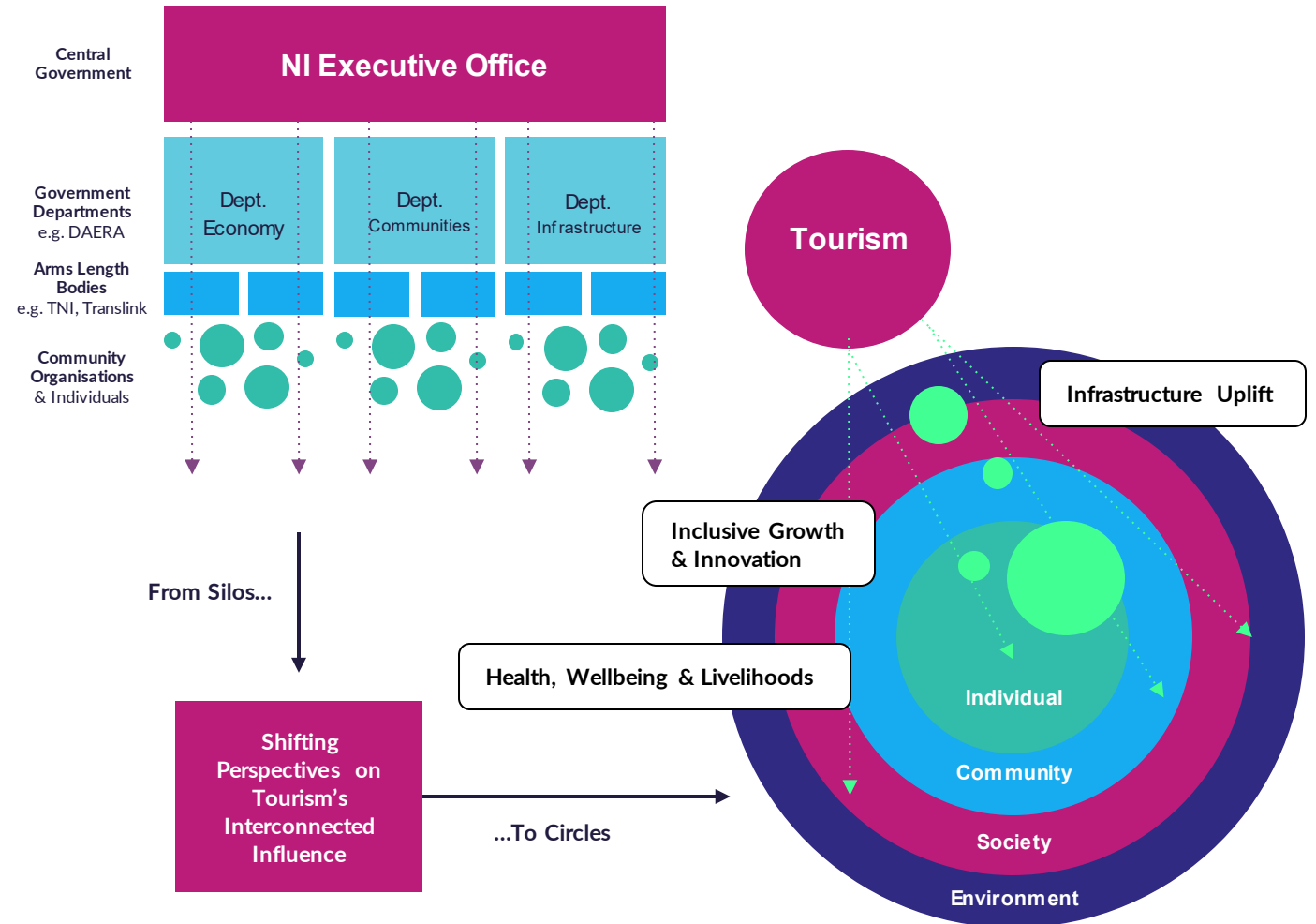


How do we get there?

Inspiring a shift in perspective

Shared Impact

Tourism as a Vehicle for Maximising Impact across Multiple Sectors



Where could we be?

Learning from International Best Practice

Where Similar Destinations are Investing



Overall Approach	Immediate Term Funding
Bespoke Destination Plans	€73,000,000 for 4 large scale products (Cavan, Donegal, Dublin, and Mayo)
2016-2022 Investment	Diversified Funding
€125,705,000	€63,000,000 from EU Just Transition fund for Midlands



Overall Approach	Immediate Term Funding
Market Led Initiatives	€1,000,000,000 for seafront enabling infrastructure projects
2017-2019 Investment	Diversified Funding
€52,900,000	€12,300,000 from the Rural Development Programme (2014-2020)

Benchmarking Examples for Project Inspiration

Zero Island, Sweden



Eden Project, Cornwall



Kaos Temple



Under



Fort Dunree

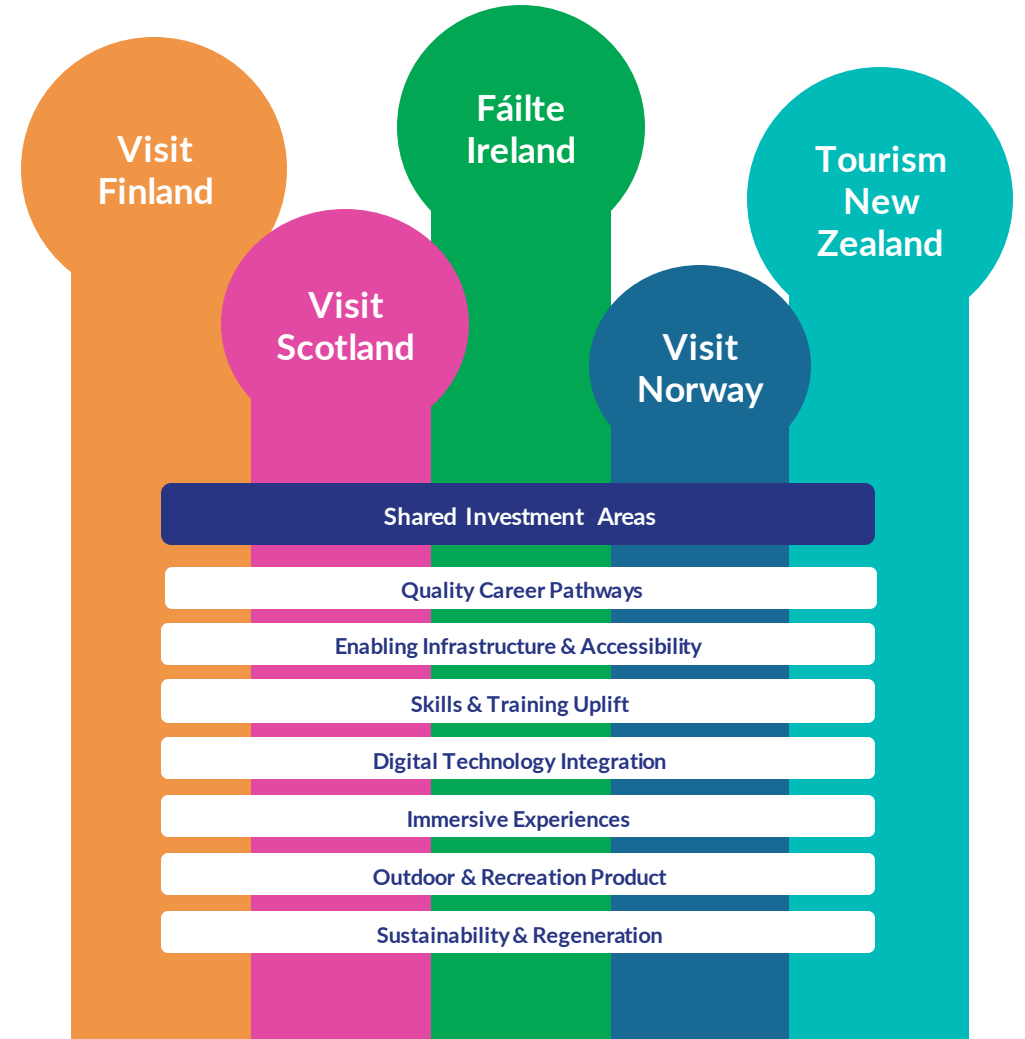


How do we get there?

Shared Investment Areas

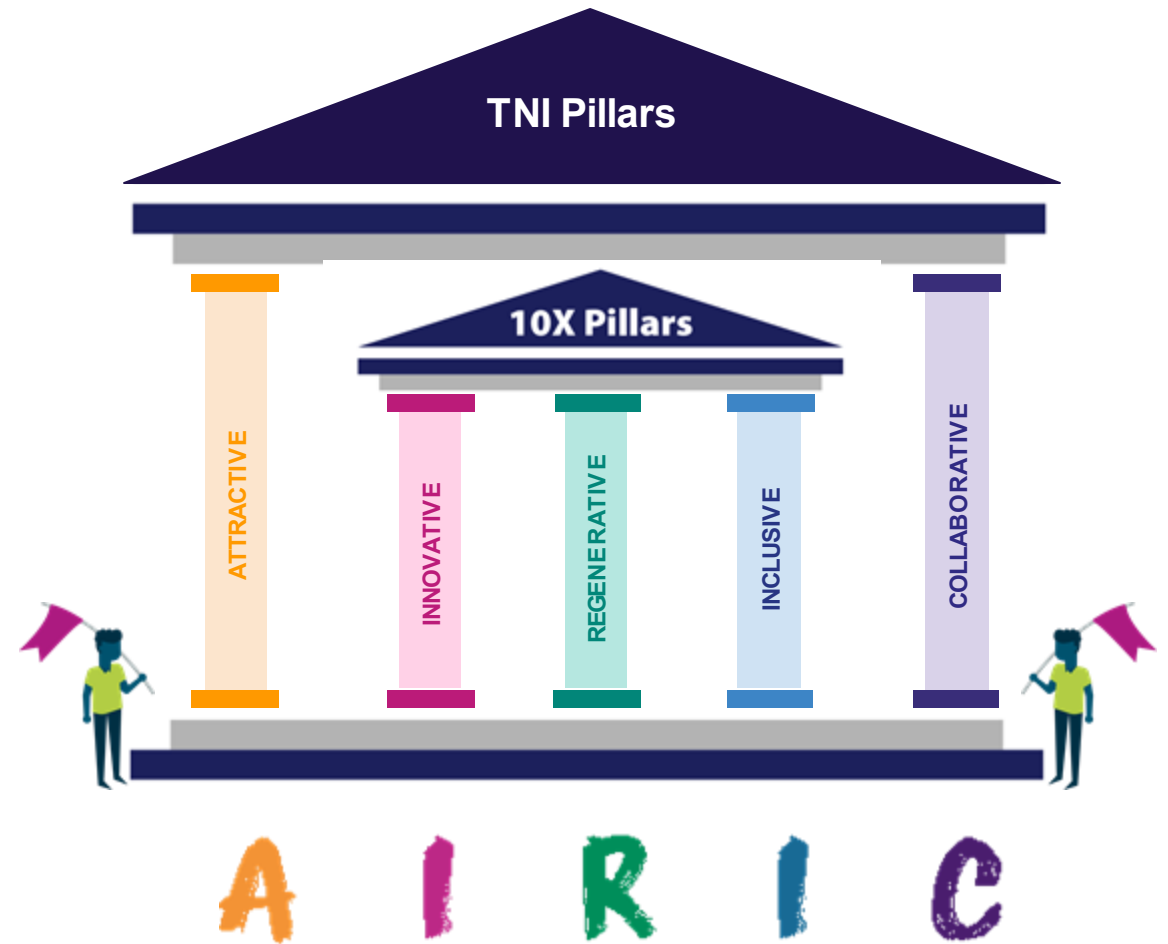
Maintaining Competitiveness

Learning from How Other Destinations Are Investing



Investing in How We Get There

Adopting the Agile 'AIRIC' Framework for Delivering Success



***Note:** The AIRIC 'Regenerative' Pillar is seen as synonymous with the 10X Strategy's 'Sustainable' Pillar. For the purposes of this report and its focus on tourism, we have chosen to adopt 'Regenerative' to ensure consistency and inclusion of community impact.

How do we get there?

The Framework

This is an outline of the developed framework, for a more detailed breakdown please see appendix 5.1

Theme		Key Measures & Objectives	10X Principle Alignment
Attractive	To inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit.	Ensuring Authenticity Enhancing Appeal Investing in Market Led Product Showcasing Heritage Remaining Distinct Uplifting the Current Offering Enhancing the Perception Retaining Visitors Remaining Competitive Extending the Core Season Ensuring Extended Stays Providing Wayfinding	“Address those issues that really matter and will make a lasting and positive difference in people’s lives... deliver positive economic, environmental and societal outcomes... and position NI as an optimum place to work, invest, live and visit.”
Innovative	We will build on our culture of innovation and creativity to deliver excellence and world class ideas to make our industry more competitive & sustainable.	Ensuring Digital Advancement and Readiness Providing High Quality Employment Identifying Employment Pathways Upskilling Employees Visitor Servicing Ensuring High Safety Standards Uplifting Impact Green Growth Testing Markets	“Position NI amongst the most competitive small advanced economies in the world ... and focus on increasing innovation in high value- added areas and priority clusters resulting in higher wages.”
Regenerative	We will build upon Northern Ireland’s unique journey of regeneration.	Encouraging Environmentally Sustainable Behaviour Enhancing Capacity Ensuring Financial Resilience Uplifting Communities, Encouraging Connections with the Natural Environment Achieving Good Health & Wellbeing Fostering Civic Pride Building Volunteering Opportunities Uplifting Infrastructure Limiting Human Impact Supporting Biodiversity Providing Locally Sourced Food Improving Active Transport Facilities	“Support a greener, more sustainable economy.”
Inclusive	A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.	Providing Access to the Arts Offering a High Quality Food Offering Providing Accessible Experiences Engaging Diverse Demographics Embracing all Cultural Identities Providing an Affordable Offering Including Community Spaces Ensuring Infrastructure and Engagement Materials are Accessible for Everyone Considering Connection to Public Transport	“Provide a fairer distribution of opportunities for all our people... inspire the future generations to thrive... and deliver improved outcomes for all including better jobs with better wages for all our people, with a more flexible work environment and better quality of life.”
collaborative	We will collaborate widely in a spirit of true partnership, nurturing a shared vision and common clarity of purpose.	Striving to Uplift and Avoiding Displacement Recognising Connections and Clusters Collaborating with Facility Provider Assessing the Location Aligning to Strategic Objectives Forming Partnerships Investing Sustainably Empowering the Public Co-designing the Development & Delivery Engaging the Local Community	“Shaped by public sector innovation and co-designed with partnership working at its heart.”

How do we get there?

Shared Investment Areas

Investing in Innovative Partnerships

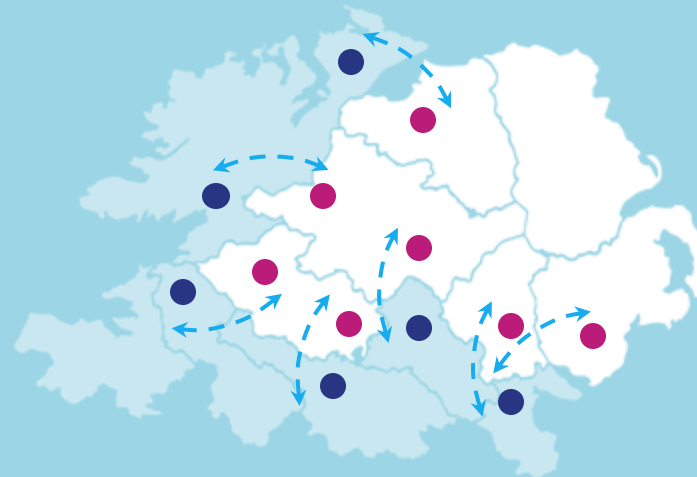


Large Scale Investment Opportunities

Understanding the current state of play with large scale funding and investment areas in Northern Ireland.

The following funders and funding pots should be considered for potential collaboration:

- Levelling Up
- Shared Prosperity Fund
- UK Community Renewal Fund
- City and Growth Deals

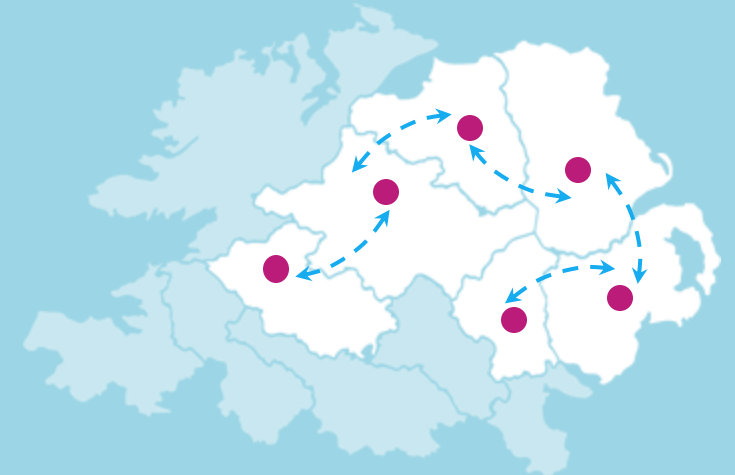


Cross-Border Collaboration

Strategically building our all-Island tourism offering through linking up with cross-border projects.

The following funders and funding pots should be considered for potential collaboration:

- PEACEPLUS
- Shared Island Fund
- Fáilte Ireland



Council Led Initiatives & Collaboration

Providing support at a grassroots level to ensure communities and local authorities have a voice in the future of tourism.

The following assets and shared platforms have been identified for potential cross-council collaboration:

- Shared Natural Assets and Waters
- Shared Spaces and Heritage
- Individual & Regional Destination Strategies

How do we get there?

The Roadmap

1 Adopt the Framework Approach



2 Strategy Synergies



3 Continued Engagement



7 Continual Assessment & Feedback



4 Develop Partnerships



5 Speak with Funders



6 Commission Destination Development Plans



8 Maintain Ambition