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Northern Ireland

Embracing Outdoor Tourism Framework

2024-2029



I: INTRODUCTION

Embracing Outdoor Tourism is a framework to deliver a strategic, coordinated approach to the development, enhancement and promotion of outdoor adventure, activity and nature tourism in Northern Ireland.

It heralds an ambition for strategic leadership and partnership amongst government departments, agencies, private and community stakeholders and a desire to harness the opportunity of working cohesively to position Northern Ireland as an outstanding sustainable outdoor tourism destination delivering the very best experiences for visitors, for the benefit of businesses, communities and environment.

This timely initiative builds on and amplifies Northern Ireland's compelling 'Embrace a Giant Spirit' destination brand and takes the lead in advancing sustainable, regenerative tourism to become a hallmark of the area. It responds to the impetus of Northern Ireland's economic strategy, with its emphasis on innovation to deliver a 'ten times better economy' (10X Economy –An Economic Vision, DfE) and recognises the opportunity to support the emerging Tourism Strategy for Northern Ireland¹ by maximising the area's potential to benefit from this high growth, high value tourism sector (IMARC²2021).

In setting out a clear agreed way forward, the Framework coheres the efforts of a wide and diverse group of stakeholders and provides a structure to develop and promote Northern Ireland's authentic natural assets, responding to well-researched and evidenced consumer demand.

The Framework was developed through an extensive, robust programme of consultation with key local and national stakeholders and informed by advice from national and international tourism destination and industry professionals (See Appendix for details).

The vision, priorities, goals and key actions set out here are testament to the confidence, optimism and generous, 'giant spirit' of all those consulted about the future of tourism in Northern Ireland and their belief in outdoor tourism as holding significant, differentiating potential for the area.

1 Department for the Economy are developing a Tourism Strategy for Northern Ireland to lead the industry through to 2034, ensuring that Northern Ireland stands out in all its key markets and delivers growth for the sector.

2 Leading market research company IMARC predicts growth of over 20% in period 2022 – 2027 in adventure / outdoor tourism with an expected value of US\$ 2,548.2 billion by 2027.

II : What do we mean by ‘Outdoor Tourism’

Definitions associated with outdoor, adventure or activity tourism and travel vary and have evolved over the years. According to the U.S. based **Adventure Travel Trade Association**, “adventure travel may be any tourist activity, including two of the following three components: a physical activity, a cultural exchange or interaction and engagement with nature”.

This definition has informed the development strategies of **Faite Ireland, Visit Scotland** and **Visit Wales** and corresponds with **Ireland’s Association for Adventure Tourism’s** statement that ‘the best types of adventure combine activity, nature and interaction with culture’, noting that ‘90% of adventure tourism is soft adventure.

Adventure tourism is also seen as a specialism of nature and ecotourism, which is tourism based on the natural attractions of an area. Again, terms used to describe and define tourism in natural environments differ.

This Framework for outdoor tourism in Northern Ireland has adopted and been informed by the definition of adventure tourism cited above and embraces the principles and practices of responsible travel to experience natural areas and their landscape, flora and fauna, protecting the environment and contributing to the quality of life of locals and communities.

III : Why a framework for Outdoor Tourism now?

The development of this Framework has been propelled by a number of factors:

- Tourism remains a key sector of the Northern Irish economy with far-reaching benefits including social and community well-being. Developed in the right manner it balances regional growth, protects and nurtures aspects of our heritage, culture and natural environment. There is significant scope to build on the success of 2019³ in terms of employment and visitor spend in areas that need it most.
- National and international evidence⁴ of changing consumer needs, with growing demand for authentic outdoor experiences. Desire and appreciation for destinations and products that demonstrate sustainable values continues to grow and influence decision making.

³ Since 2013 tourism has grown by 46% to achieve an unprecedented £1bn in revenue in 2019, of which £731m were export earnings. The tourism, travel and hospitality sectors employed approximately 70,000 people in 2019, with 12,800 new jobs created since 2013. This was double the growth in jobs experienced in other sectors of the economy over the same period. These jobs were generated in every part of Northern Ireland with over two thirds of jobs located outside Belfast (TNI)

⁴ Tourism NI - Consumer Sentiment Analysis, Faite Ireland research.

- Potent opportunity to augment and amplify the Embrace a Giant Spirit Masterbrand with a resonant outdoor tourism proposition and offering, alongside an opportunity to position Northern Ireland as an exemplar in Sustainable Tourism.
- Belief that Northern Ireland has the assets, community support and skills to deliver a credible outdoor tourism proposition, offset by the knowledge that Northern Ireland is currently losing competitive advantage, falling behind other nearby destinations (including Republic of Ireland and Scotland) in terms of investment in infrastructure, products and supports, destinations planning and visitor management practices.
- An appetite to cohere and optimise the investment and efforts of a wide range of stakeholders including businesses, operators and community groups who are providing outdoor tourism services.

IV : Guiding Principles

i : Sustainability

This Framework takes the opportunity to embed sustainable and regenerative tourism principles to support the delivery of a thriving visitor economy that builds prosperous, robust, resilient communities and contributes to the health and well-being of our environment, culture, and society.

It will be delivered by taking the opportunity to cultivate and share the Embrace a Giant Spirit narrative that expresses the essence of Northern Ireland and is called out in our shared vision, commitment to collaboration and within each of our strategic priorities and goals.

ii: Vision

The Framework presents a 10-year vision, together with a 5-year strategy towards the achievement of that vision.

By 2034, visitors are discovering and embracing the giant spirit of Northern Ireland's unique great outdoors. They are holidaying in / spending time and money here because of the quality, variety and novelty of outdoor activities and nature experiences within our beautiful landscapes and fascinating coast.

There is so much to do, discover and enjoy that visitors are coming back again and again, forging a bond with the people and places of Northern Ireland and encouraging others to do so too. Our success as an outdoor destination has been achieved by the shared endeavour of public, private and community partners and through effective responsible tourism visitor targeting and communications.

Working together, we are advancing the development of a world class tourist-centric infrastructure and enhancing the capacity and capability of all those who are necessary for us to deliver on our ambitions.

Our collective effort, pride of place and commitment to the principles of sustainable tourism are creating a culture where outdoor tourism delivers meaningful economic and social benefits to our local communities and destination.

iii: Partnership Commitment

The process of developing the 5-year strategy brought together for the first time many of the stakeholders critical to the success of outdoor and nature tourism in Northern Ireland.

They all recognised that to achieve our shared long-term vision for our destination, we need co-operation and collaboration among all the stakeholders, alignment of effort and resources, especially from government departments and public agencies.

The following statement articulates this shared commitment:

As public agencies, businesses and communities, we commit to work together with confidence and optimism to deliver on the ambitions of this Framework and so advance Northern Ireland's positioning as an outstanding outdoor tourism destination.

We will have the courage to be innovative. We will encourage and inspire others in pursuit of this aim. We will be true to the ethos of sustainability that safeguards the environment and culture that makes our great outdoors unique.

V : Priorities

To deliver and achieve our vision requires a new way of working for all partners. Four areas of strategic priority have been identified. We need to focus and cohere our efforts in these areas to advance our shared ambition for Northern Ireland as a destination where outdoor tourism delivers economic and social benefits to all its stakeholders.

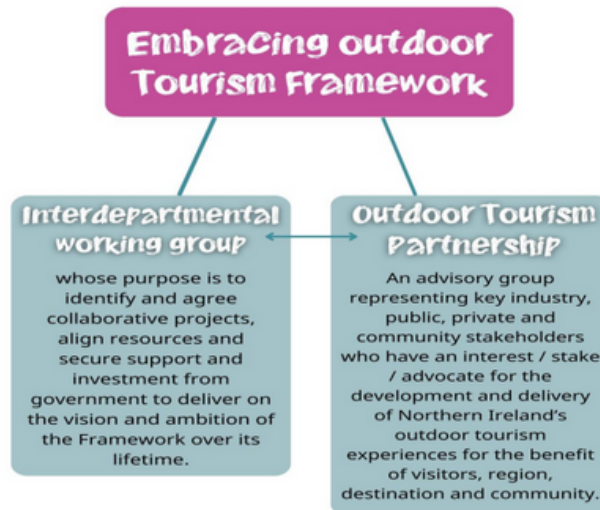
- **Leadership and Partnership**
Lead stakeholders are working cohesively and effectively with the resources in place to deliver this Framework.
- **Destination Development**
A singular destination development approach is delivering investment in quality visitor infrastructure, supporting sustainable development and positioning Northern Ireland as a credible destination for outdoor tourism.
- **Product and Visitor Experience Development**
More visitors are enjoying exceptional outdoor experiences across Northern Ireland.
- **Advocacy and Communications**
Northern Ireland is celebrated inside and out as one of the most exciting new destinations for outdoor tourism experiences.



Structure for Delivery

The delivery and implementation of the framework requires a partnership model between public, private and community stakeholders to achieve its goals, strategic objectives, priorities, and associated actions. To ensure the efficient alignment of existing resources, shared plans and action-oriented delivery, two groups are constituted:

- **Interdepartmental Working Group**
- **Outdoor Tourism Partnership**



The following section provides a breakdown of key activities under each area of priority, with work considered under the following timelines:

- Activities marked as 'Immediate' are critical to the implementation of this plan and take place within a 2024 – 2025 timeframe. Some activities noted here are already underway.
- Activities designated as 'Mid-term' will take place within the period of 2026 -2027.
- Activities noted as 'Long-term' are for completion by 2029.

A number of activities will by their nature need to be undertaken on an "Ongoing" basis over the lifetime of this Framework and are marked as such.



Priority #1 Leadership and Partnership

Goal

Lead stakeholders are working cohesively and effectively with the resources in place to deliver this Framework.

Why this goal?

Current investment and plans are delivering discrete actions which work towards the development of Northern Ireland as an outdoor tourism destination. However, there is no cohesive, strategic approach.

There is a need to mobilise stakeholders to work in partnership and align efforts to secure investment in infrastructure, product and visitor experiences.

	Key Activity	When
1.1	TNI to prioritise the internal and advocate for the external resources and capacity to support and coordinate the delivery of the Framework.	Ongoing
1.2	<p>Institute the Outdoor Tourism Partnership⁵, representing key industry, public, private and community stakeholders who have an interest / stake / advocate for the development and delivery of Northern Ireland's outdoor tourism experiences for the benefit of visitors, region, destination and community.</p> <p>The group will guide, inform and champion the delivery of the Framework by:</p> <ul style="list-style-type: none"> • Providing insights and information to support delivery. • Sharing relevant elements of existing and emerging plans to support future alignment of resources and product development. • Building support with all other stakeholders. • Supporting future marketing and promotional initiatives. • Identifying experiences that will enhance and build reputation for Northern Ireland as an outdoor destination with domestic and international visitors. <p>Immediate action – to develop terms of reference and identify key stakeholders to represent on group.</p>	Immediate

	Key Activity	When
1.3	Develop terms of reference for and establish a high level interdepartmental working group, with an independent Chair, to align resources, secure support and investment from government to deliver the vision and ambition of this Framework.	Ongoing
1.4	Establish and agree strategic and sustainable development principles to target and align investment and resources, supported by spatial mapping, and underpinned by shared commitment to deliver world class outdoor tourism infrastructure and amenities.	Immediate/Mid-term
1.5	Seek to identify, agree and activate a suite of MoUs / SLAs with Local Councils and key agencies to include but not limited to DAERA, ⁶ DfC, ⁷ DfI ⁸ as a mechanism for delivering strategic projects, allocating capital funding, resourcing experience development and shared marketing. Project partnerships may also include agencies and NGO's such as National Trust, Area Based Management Boards and state landowners.	Mid-term
1.6	Identify, map and target existing programmes that can be leveraged and aligned to support implementation as well as additional funding streams to resource key projects and agreed actions – eg Peace plus, Shared Island Funds, Transition funding etc.	Mid-term/Long-term
1.7	Identify funding to support and resource Knowledge Exchange and Learning Journeys to experience comparator destinations.	Immediate/Mid-term
1.8	Define performance, outcome and impact indicators, guided by VICE model, and track and monitor progress. ⁹	Immediate/Ongoing

Priority #2 Destination Development

Goal

A singular destination development approach is delivering investment in quality visitor infrastructure, supporting sustainable development and positioning Northern Ireland as a credible destination for outdoor tourism.

Why this goal?

There is a need to cohere and prioritise development activity to maximise the potential for outdoor tourism in Northern Ireland and to advance a sustainable tourism agenda. A destination development model will identify priority areas for infrastructural investment, including development, enhancement and maintenance and deliver the best return for all involved.

	Key Activity	When
2.1	<p>Scope and design a sustainable destination stewardship model for Northern Ireland to progress the development of outdoor tourism that is informed by:</p> <ul style="list-style-type: none"> • The framework vision • Embrace a Giant Spirit destination brand • Tourism NI Product Review (2023) • Consumer analysis and trends • National and international best practice from comparator destinations 	Immediate/Mid-term
2.2	<p>Informed by strategic and sustainable development principles, existing infrastructure projects as well as an emerging destination development model(s), influence and identify a shared strategic plan of projects, which may be new or existing, that will deliver for outdoor tourism in NI, cohering investment from a range of agencies and authorities.</p>	Mid-term/Long-term

	Key Activity	When
2.3	<p>Ensure that sustainable and regenerative practices and quality visitor management principles are integral to the planning, development, maintenance and management of outdoor tourism experiences and include commitment to:</p> <ul style="list-style-type: none"> • Robust community and stakeholder engagement • Transparent criteria for project selection and investment • Principles and standards for trail development and management • Capacity and capability building supports • Agreed targeted marketing and visitor communication • Appropriate investment in environmental assessment, impact, mitigation and enhancement • A commitment to achieving targets included in the Climate Change Act (Northern Ireland) 2022 	Ongoing
2.4	<p>Review and seek to secure access arrangements with relevant communities and landowners that are required for delivery of outdoor tourism experiences.</p>	Ongoing/Long-term
2.5	<p>Advance universal access and inclusive design as part of Northern Ireland's outdoor experience offer to include enhancement of existing assets, planning, implementation and consultation to ensure needs of all users are understood and delivered.</p>	Long-term

Priority #3 Product and Visitor Experience Development

Goal

More visitors are enjoying exceptional outdoor experiences across Northern Ireland.

Why this goal?

Northern Ireland has the physical and cultural assets for outdoor tourism experiences. However, these need to be honed and crafted to attract visitors from target markets and key segments.

Market and consumer insights as well as the EaGS model needs to be elevated to inform destination planning, product and experience development.

A shared approach to visitor experience planning and delivery needs to be developed and resourced across Northern Ireland.

	Key Activity	When
3.1	Gather in-depth market research and comparator insights to keep pace with visitor needs and to inform capital infrastructure, product and experience development.	Ongoing
3.2	Using EaGS, refine a distinctive outdoor tourism visitor experience proposition that is motivating for the identified target markets and segments.	Ongoing
3.3	Provide information and tools to support stakeholders to create and deliver accessible and inclusive outdoor tourism visitor experiences.	Ongoing
3.4	Herald an inclusive strategic process to support key stakeholders to create outdoor tourism visitor experience plans that are of scale, motivating to the visitor, aligned to EaGS, target markets and segment needs.	Mid-term
3.5	Seek to create a programme of capital funding as well as operational supports and resources to build visitor experience capacity and skills across the outdoor tourism business and stakeholder base to include: <ul style="list-style-type: none"> • Experience development grants and supports • Market and promotional activity • Trade toolkits and experience case studies 	Ongoing
3.6	Stimulate and incentivise innovative product and experience development, including harnessing digital and new animation as and if appropriate via pilot grant programme.	Mid-term
3.7	Support business and community operators to work together to achieve identified objectives and business aims via the dissemination of Good Practice Guidelines, Risk Management, Insurance, support, and training.	Mid-term

Priority #4 Advocacy and Communications

Goal

Northern Ireland is celebrated inside and out as one of the most exciting new destinations for outdoor tourism experiences.

Why this goal?

There is scope to build the support and confidence of decisionmakers and those in local communities about Northern Ireland as an outdoor destination.

Barriers to development must be addressed and accommodations achieved. The marketing and promotion of Northern Ireland's giant spirit outdoors must be proudly and persuasively shared with key markets and consumer segments.

	Key Activity	When
4.1	Engage local and national decision-makers to build understanding of and support for the ambition for outdoor tourism in Northern Ireland, unlocking investment and ensuring required legislative provision.	Immediate/ Ongoing
4.2	Develop and implement an initial stakeholder engagement plan to share the Framework, communicate roles and responsibilities and build confidence and commitment to its delivery via workshops, toolkits, learning journeys and comparator insights.	Immediate
4.3	Invest in relevant impact studies e.g. socio-economic and environmental, to support investment, secure future partners and build ongoing stakeholder commitment.	Mid-term/Long-term
4.4	Advocate for responsible, sustainable, regenerative tourism and amplify the work of other movements and campaigns who share this ambition.	Ongoing
4.5	Consider and agree a commons system such as 'Leave No Trace' to promote responsible visitor behaviour and educate all to enjoy and protect our outdoor environment.	Ongoing

	Key Activity	When
4.6	Develop and implement a discrete outdoor tourism marketing and communications strategy targeting new segments and international operators. Create a supporting toolkit to promote consistent and coherent messaging.	Immediate/ Mid-Term
4.7	Enable a community of stakeholders and partners to come together, work together and learn via annual forums, national and international networking events and online supports.	Ongoing
4.8	Participate in high profile destination recognition and award programmes to spotlight success and celebrate achievement.	Mid-term/Long-term

VI : Implementation and Delivery

The realisation of this Framework relies on the collective effort of Tourism NI and key government departments and agencies, including, DAERA, Department for Communities, Department for the Economy and Department for Infrastructure.

On-going cooperation and collaboration across and between the wider community of stakeholders will be led and coordinated by this high-level group of partners.

The implementation of this Framework will require annual workplans, agreed with each lead partner, who will seek to allocate available resources and budget to progress specific objectives and actions.

Risks and barriers to implementation will be assessed on an ongoing basis. Informed by this, workplans will be reviewed and amended as required.

Performance and measurement will be informed by sustainable – regenerative indicators and measurement such as VICE or similar.



Assisting a visitor inside Mussenden Temple via a new stair-climber, Mussenden Temple and Downhill Demesne, County Londonderry.
©National Trust Images/Conchúr Dowds

Appendix : Strategy Development Process

The Framework was developed following an extensive programme of consultation with key local and national stakeholders and was informed by insight gathered from national and international tourism destination and industry professionals.

There were two phases of consultation and research. The first 'discovery' phase sought to review existing plans and information and to uncover pertinent themes and potential priorities for investment and development. Work in this phase encompassed:

i. Desk Research

Reviewing current tourism and economic strategies, outdoor recreation plans, relevant area and trail masterplans, sample of visitor management and experience frameworks as well as marine and coastal plans.

ii. Workshops

- Online visioning workshop engaging 23 representatives from local authorities, landscape partnerships, agencies, trade associations and the tourism sector.
- In-person workshop with 42 local outdoor tourism industry professionals and follow-up questionnaire.
- Online case study workshop with representatives from Fermanagh & Omagh District Council and Cavan County Council.

iii. Semi-structured depth one-to-one and mini-group interviews with representatives from:

- Government Departments/Agencies
- Local Authorities
- Business/Experience Providers
- NGO/Partnerships/Trusts

iv. Engagement with international tourism experts

Once this 'discovery' phase of research and consultation was completed, a findings report was prepared and key considerations for the development of outdoor tourism in Northern Ireland identified.

The findings report was shared and discussed with the following groups, to further shape and cohere the strategic priorities and key activities of the Framework:

- Representatives from local authorities, landscape partnerships, agencies, trade associations and the tourism sector (Visioning workshop participants)
- Management Team of Tourism NI
- Members of the Tourism Division, Department for the Economy
- Members of the Rural Development and Funding teams, Department for Agriculture, Environment and Rural Affairs (DEARA) and Department for Communities
- Senior Management Team, National Trust, NI

We would like to thank the following for their participation in the consultation process and their contribution to the development of this Framework.

Elwyn Agnew, Following Seas
Paul Armstrong, Woodland Trust
George Bradshaw, Fermanagh & Omagh District Council
Michelle Boyle, Newry Mourne and Down District Council
Caroline Bloomfield, Sustrans Northern Ireland
Eimear Callaghan, Tourism NI
Thomas Campbell, Cab Tours Belfast
Martin Carey, Mourne Heritage Trust
Samuel Chestnut, Eden Gate / Enjoy the Mournes
Martha Conlin, Visit Belfast
Louise Conn, Benone Getaways
Brain Connolly, Tourism NI
Eileen Cowan, Department of Infrastructure
Rachele Crawford, National Trust, NI
Gwen Cunningham, Crawford's Rock Seaweed
Louise Curry, Fermanagh Lakeland Tourism
Ian Davidson, Fermanagh & Omagh District Council
Carol Devlin, Dunfin Farm
Caroline Diamond, Diamond Consulting
Des Dickson, Department for the Economy
Sheena Dickson, Tourism NI
Ciaran Doherty, Tourism NI
Sharan Dustagheer, Department for Infrastructure
Gareth Evans, DAERA
Tara Farrell, Fermanagh & Omagh District Council

Sarah Field, Tourism NI
Amy Fitzpatrick, Blue Green Yonder
Eimear Flanagan, IAAT Board member and Away a Wee Walk
Barry Flannagan, Erne Water Taxi
Ruth Flynn, Visit Belfast Norma Forrest, Waterways Ireland
Claire Garrad, Clandeboye Lodge
Richard Gillen, Causeway Coast & Glens District Council
Yvonne Gordon, International Travel Writer and Photographer
Andrew Grieve, Department of Infrastructure
Stephen Harpper, Tour Guide
Kathryn Hill, Department for Communities
Emma Holden, National Trust NI
Rob Holms, GLP Destination Storytelling and Content Marketing Company
Jessica Hoyle, Tourism NI
Susan Hunter, Tourism NI
Tracey Hunter, Fermanagh & Omagh District Council
Lauren Irwin, Visit Belfast Michelle Jamison, Tourism NI
Aine Kearney, Tourism NI
Brendan Kenny, Ireland's Association for Adventure Tourism (IAAT)
Deborah Kinder, Get Up & Get On Paddleboarding
Lucia King, Tourism NI
Sharon Lavin, Waterways Ireland
Kathryn Lee, Outscape (formerly Outdoor Recreation NI)
Brian Leonard, Corralea Activity Centre
Gillian Little, National Trust NI
Caro-Lynne Ferris, Outscape (formerly Outdoor Recreation NI)
Anne Madden, Sustrans Northern Ireland
Kieron Magee, Tread The Boards
Aideen Martin, Outscape (formerly Outdoor Recreation NI)
Stewart Mathews, Department for the Economy (DfE)
Tracey McCallen, Fermanagh & Omagh District Council
Maria McAlister, Tourism NI
Debbie McCamphill, Historic Royal Palaces
Kate McClements, Department for Communities
Mike McClure, Sport NI
Mary McFerrann Tourism NI
Conor McGarvey, Fermanagh & Omagh District Council
Helen McGorman, Tourism Ireland
Kerrie McGonigle, Causeway Coast & Glens Borough District Council
John McGouran, Tourism NI
John McGrillen, Tourism NI
Siobhan McGuigan, Tourism NI
Marie-Louise McKenna, Visit Belfast
Mary McKeown, Mid Ulster District Council
Heather McLoughlin, National Trust NI

Martin McMullan, Life Adventure Co
Ainsley McWilliams, Tourism NI
Derek Moore, Limitless Adventure Centre
Joanne Moore, Department for the Economy (DfE)
Denise Murphy, Woodland Trust
Heather Nicholl, Ella Mor
John Joe O Boyle, DAERA
Grainne O'Connor, Cavan County Council
Claire O'Kane, Mussenden Sea Salt
Colin O'Neill, Colin Glen Trust
Amy Patterson, Crindle Stables
Nikki Paterson, Tourism NI
Erika Piik, GLP Destination Storytelling and Content Marketing Company
Lizzy Pinkerton, Belfast Hills Partnership
Gary Quate, Tourism NI
Rob Rankin, Vagabond and Driftwood Tours, Sustainable Travel Ireland and ITOA
James Redmond, Department for Infrastructure
Anna Reid, Mid Ulster District Council
David Reed, DAERA David Roberts, Tourism NI
Mark Rodgers, Dalriada Kingdom Tours
Deyna Schrader, Visit Belfast Darren Scott, Tourism NI
Graham Seymore, Ulster Federation of Rambling Clubs, ex Chair NORF
Tara Smith, Cavan County Council
Sharon Smyth, Department for the Economy (DfE)
Kieran Swail, SRC
Elmarie Swanepoel, Lough Erne Landscape Partnership
Iassc Swindell, Tour Guide
Maia Taylor, DAERA
Ciara Toner, Sperrins Partnership
Naomi Waite, Tourism NI
Kevin Wilson, Loughs Agency
Michelle Wilson, Crawford's Rock Seaweed
Pamela Wilson, Tourism NI

