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Tourism Ireland



Tourism Recovery Action Plan

Response from Diane Dodds,
Minister for the Economy.
May 2021

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On my appointment as Economy Minister on 11 January 2020, I was looking forward to promoting the new Northern Ireland “Embrace a Giant Spirit” Brand across the globe.

As I made plans to travel to the USA for St Patrick’s week, I could never have anticipated the impact that the emergence of a new coronavirus in Wuhan, China would have on our tourism and hospitality industry. Instead, I was anticipating leading our world-class tourism and hospitality industry into another record year.

2019 had been a year of records for tourism and hospitality in Northern Ireland. It was the year when The Open returned to Royal Portrush for the first time since 1951; when we first welcomed an estimated 5.3 million overnight visitors (including trips by visitors from outside Northern Ireland and domestic trips taken by local residents); when we benefitted from more than £1 billion in visitor spend; and when we received a total of 167 cruise ships, a 30% increase on the previous year and a massive increase from the 62 cruise ships that docked in 2013.

2019 was the culmination of a decade of investment by Government and industry, which led to a 60% increase in visitor numbers and an 89% increase in visitor spend between 2009 and 2019. By the end of 2019, the wider tourism and hospitality industry employed approximately 70,000 people across every part of Northern Ireland.

Unfortunately, the outbreak of the COVID-19 pandemic in early 2020 had an immediate, massive and unprecedented impact on tourism and hospitality in Northern Ireland, as it had upon countries around the world. Huge economic impacts that might normally have taken months - or years - to unfold occurred within weeks as a result of widespread lockdowns and restrictions.

An unprecedented crisis requires an unprecedented response, and a wide range of interventions were introduced by the UK Government and the Northern Ireland Executive to help our tourism and hospitality industry, and wider economy, survive the crisis.

My primary objective throughout the pandemic has been, as far as possible, to protect jobs, prevent business closures and promote economic recovery.

In April 2020 I established a Tourism Recovery Steering Group. This brought together public and private sector stakeholders to help address the many challenges presented by COVID-19. The Steering Group was supported by a Working Group and Task and Finish Groups.

I am grateful to all those involved for the positive and pro-active manner in which they contributed to the development of a phase one Tourism Recovery Action Plan, and more recently to phase two of that Action Plan which is the main subject of this document.

Delivering on this phase of the Action Plan will enable us to provide tailored support for our tourism and hospitality industry as it emerges and recovers from COVID. In parallel with delivering the plan, my officials will undertake preparatory work for a longer-term sustainable tourism strategy to set the vision for the next decade. Much still needs to be done and I am very aware that some sectors of our tourism and hospitality industry will face greater challenges than others as we recover from COVID.

However, there are strong grounds for optimism for the future, not least in respect of the tremendous work of our Health Service in rolling out the vaccination programme. I also believe this crisis has brought home to local people, and visitors from out of state, just how valuable and outstanding our tourism and hospitality product is, as well as demonstrating the excellence and resilience of those who make up the industry.

2019 was a record year for tourism and hospitality in Northern Ireland. By government and industry working in partnership, I am confident that we will recover our pre-COVID success and will return to breaking records.

DIANE DODDS MLA
Minister for the Economy



2. Introduction

In April 2020, Diane Dodds MLA, the Northern Ireland Economy Minister, established and chaired a Tourism Recovery Steering Group to assist in responding to the immediate, and devastating, impact of COVID-19 on the tourism and hospitality industry. The Group, which brought together stakeholders from industry, central and local government, was tasked with developing a Tourism Recovery Action Plan aimed at ensuring the survival, and subsequent recovery, of the tourism and hospitality industry from the impact of the COVID-19 pandemic.

The Minister also established a supporting Tourism Recovery Working Group, chaired by John McGrillen, the Chief Executive of Tourism NI, to lead on engagement with all sectors of the tourism and hospitality industry. The Working Group was supported by over 100 stakeholders via 10 Task and Finish Groups.



3. Phase One Tourism Recovery Action Plan

The Working Group developed phase one of the Tourism Recovery Action Plan which was considered by the Steering Group in September 2020. The phase one Action Plan was instrumental in enabling the Economy Minister to secure significant, additional funding from the NI Executive to help the tourism and hospitality industry deal with the impact of COVID, in terms of supporting business survivability, improving industry resilience and driving essential visitor demand.

Progress in respect of implementing phase one has included:

- Implementation of “We’re Good to Go”;
- Targeted marketing of the domestic, GB and Republic of Ireland markets to drive visitor demand;
- Support aimed at a wide range of tourist accommodation providers (as well as wet pubs);
- Support to develop new (and upgrade) existing visitor experiences to meet post COVID consumer expectations;
- Support for tourism businesses to develop their websites to secure future business through online bookings;
- Support towards the cost of consultancy support to assist businesses to plan their response to the COVID pandemic;
- Support for NI tourism businesses participating on international virtual sales platforms to secure business from international tour operators in 2021 and 2022;
- Support for international tour operators and Destination Management Companies to programme and promote Northern

Ireland as a tourism destination to international consumers for 2021 and 2022;

- Support for the conference sector in retaining conference activity planned for Belfast in 2020 but postponed due to COVID, and in securing post COVID business in what will be a very competitive market and,
- Marketing support for businesses to help with the cost of their own marketing in NI and the Republic of Ireland alongside Tourism NI's marketing campaigns.

As we know, further waves of COVID in late autumn 2020 and early 2021 saw the reintroduction of widespread restrictions in respect of the tourism and hospitality industry, which required continuing focus on survival measures.

4. UK Government and NI Executive Support

The unprecedented scale of the challenge faced by many sectors of the economy as a result of COVID was evidenced by the extensive range of interventions and mitigations introduced by the UK Government and NI Executive during the course of 2020/21. Many of these initiatives were of benefit to the tourism and hospitality industry.

UK Government The UK Government put in place a range of measures aimed at protecting the wider economy, as well as a series of employment protection measures, most notably the Job Retention Support Scheme. A range of loan facilities was also put in place to ensure that businesses could remain solvent in the absence of normal sources of income. In addition, specific interventions were put in place aimed at stimulating demand within the tourism and hospitality industry, including a VAT reduction on tourism and hospitality related purchases.

Northern Ireland Executive The Northern Ireland Executive also took decisive action to support the local economy. The Department for the Economy provided almost £500 million of support via £10k and £25k Small Business Support Grant Schemes, a Hardship Fund aimed at micro- businesses and social enterprises, a COVID Restrictions Support Scheme, a Wet Pubs Business Support Scheme, a Large Tourism and Hospitality Business Support Scheme and



a B&B, Guest House and Guest Accommodation Scheme. Extensive support for business was also provided by other NI Departments. For example, the Department of Finance provided business rates relief for the 2020/21 financial year, delivered the Local Restrictions Support Scheme and supported Northern Ireland's airports; the Department for Communities supported the arts, culture and heritage sectors; and the Department for Infrastructure supported private bus, coach and taxi operators.

However, with the roll-out of a successful vaccination programme across Northern Ireland in recent months, the focus of support is now moving from survival measures to a safe and permanent re-opening of the industry, with a key focus on recovery and a return to profitable trading conditions.

Economic Recovery Action Plan

On 25 February 2021, the Economy Minister also published an Economic Recovery Action Plan (ERAP) which set out a range of decisive actions to kick-start economic recovery as we emerge from the COVID-19 pandemic. Economic recovery action plan - Rebuilding a stronger economy (economy-ni.gov.uk).

ERAP recognises the significant impact that COVID-19 has had on the tourism and hospitality industry. Through the ERAP process, we identified actions which are critical to supporting the survival and rebuilding of the tourism industry. This enabled us to secure significant additional Covid related funding which would help us to deliver phase two of the Tourism Recovery Action Plan. The ERAP is a living document and, as we keep recovery under review, we may be able to seek additional funding should it become available.

5. Phase Two Tourism Recovery Action Plan

In February 2021, to assist with recovery and regrowth, the Economy Minister tasked the Tourism Recovery Steering Group with advising on the development of phase two of the Tourism Recovery Action Plan. Having been presented with a draft Action Plan by Tourism NI on 24 February, the Steering Group recommended this issue to the members of the Working Group for their consideration.

On 11 March, the draft plan was presented to the Working Group and 28 responses were received from the ten Task and Finish Groups and other members of the Working Group. These responses have now been considered in depth by Tourism NI and DfE officials, in consultation with other Government Departments.

A number of the recommendations made in response by the Working Group related to preparation, guidance and support for the re-opening of the tourism and hospitality sectors. Some of these have been overtaken by the passage of time and have, therefore, been excluded from this document.

Whilst the focus of this plan is firmly on recovery, Working Group members have identified sectors of the tourism and hospitality ecosystem which, due to ongoing restrictions, social distancing requirements, or their dependency on international tourism, may require financial support to remain solvent until such times as they can operate profitably. Funding requests were received from the Task and Finish Groups including support for a range of businesses within the tourism eco-system. These proposals will require further consideration, given their potential to have repercussions across many sectors in Northern Ireland, and may need to be considered in a wider UK or NI Executive context. Given the ongoing uncertainty and risks associated with COVID-19, and its



potential impact on the tourism industry, this plan, like the Economic Recovery Action Plan, will remain under review and amendments may be made to include actions required to address challenges which may arise in the months ahead.

This Action Plan sets out those actions identified through the consultation process which best meet the current needs of the sector and can be delivered within the resources available across Government at this point in time, to support the recovery of the industry.

The phase two actions are broken down into eight distinct themes aimed at assisting in the long-term recovery and sustainable growth of the tourism industry.

Theme 1: Business Continuity

Theme 2: Creating Consumer Confidence

Theme 3: Stimulating Consumer Demand

Theme 4: Safeguarding Connectivity

Theme 5: Enhancing the Competitiveness of the Region

Theme 6: Enhancing the Capability of Businesses

Theme 7: Enhancing the Skills of the Workforce

Theme 8: Creating a Supportive Policy Environment

Within each theme is a range of associated actions. Where appropriate, actions will be subject to normal approval processes including tests for value for money, meeting any EU State Aid / UK subsidy control requirements and screening.

Successful delivery of phase two of the Action Plan will require government and industry working together in partnership. All parts of the tourism and hospitality ecosystem, representative bodies, destination management organisations, local government, government departments, tourism agencies - and the tourism businesses in particular - have roles to play.

By working in partnership to ensure delivery, the actions within this Plan will form a solid foundation for the recovery of the Northern Ireland tourism and hospitality industry, and the development of Northern Ireland as a sustainable and competitive tourism destination that meets the needs of both future visitors and local communities alike.

The eight themes and associated actions in phase two of the Tourism Recovery Action Plan are set out below.

6. Key Themes



Theme 1: Business Continuity

Supporting the tourism ecosystem through recovery and growth, ensuring it is well-placed to meet and maximise demand in future years.

Whilst the focus in phase two of the Action Plan is primarily aimed at promoting the recovery and growth of the tourism sector over the next two years, it is important to recognise that many businesses entered into the pandemic with limited reserves due to the seasonal nature of the industry.

Despite the unprecedented support from Government, many have become increasingly vulnerable due to incurring ongoing costs whilst being unable to generate revenue, or as a result of increasing levels of debt which now has to be repaid.

The Action Plan recognises these ongoing challenges and consequently a range of programmes has been developed to ensure continuity and sustainability of a complete tourism ecosystem. The aim is to help tourism businesses build back better, enhance productivity and competitiveness and meet immediate market requirements while planning and innovating effectively for the future. The COVID Market-Led Product Development Programme for example, aims to increase and enhance the NI-wide tourism experience offer and ensure that it meets changed market conditions and closer-to-home markets. The Programme will support the industry to ensure that there are sufficient compelling and available experiences on offer throughout the region and, through the provision of research and feasibility costs, ensure a strong pipeline of future development projects for upcoming capital funding programmes.

Businesses have benefitted from abatement of fees, payment relief and tax reductions during the pandemic. As businesses continue to recover, extension of these support mechanisms will assist in ensuring continuity of business activities. So, for example, the NI Executive has extended rates relief to businesses in the tourism and hospitality sectors until 31 March 2022.

Action	Responsible / Lead organisation
<p>Deliver a Kick Start Post Covid Programme for Tourism Providers to provide direct financial assistance to support them to build back better. The programme will address the following areas:</p> <ul style="list-style-type: none"> • Business model restructuring and innovation to enhance productivity and competitiveness. • Recruitment and Talent Development to enhance productivity and competitiveness. • Sustainability investment to sustain market demand and enhance competitiveness. • Increased and sustained marketing activity to retain and increase sales in core markets. 	TNI
<p>Deliver a COVID Market Led Product Development Programme (Revenue funding) that will increase and enhance the NI wide tourism experience offer and ensure that it meets changed market conditions and closer to home markets. The programme will:</p> <ul style="list-style-type: none"> • Provide financial support during 21/22 to ensure that there are sufficient compelling and available experiences on offer throughout the region during Tourism NI's campaigns. • Include a strong emphasis on the Food and Drink offer. • Cover research and feasibility costs to ensure a strong pipeline of future development projects for upcoming capital funding programmes. 	TNI
<p>Deliver a COVID Business and Financial Planning Programme to support tourism businesses to engage advisors to deal with the challenges of COVID 19 including financial planning and debt restructuring. This programme will be a continuation of the COVID Business and Financial Planning Programme launched in 20/21 which has experienced ongoing demand.</p>	TNI
<p>Continue to deliver Tourism NI's Business Support Helpline (advice service) with free access to legal, financial and debt management advice.</p>	TNI
<p>Extension of Business Rates Relief for Tourism and Hospitality Business until 31 March 2022.</p>	DoF

<p>Support the industry by continuing to lobby UKG for an extension of the VAT reduction in hospitality related industries for a further year until 31 March 2023.</p>	DoF/NITA
<p>Support a range of actions to rebuild cruise tourism to Northern Ireland.</p>	TNI/ Cruise Belfast/ Visit Derry
<p>Consider undertaking a rates revaluation of non-domestic properties to take account of the fundamentally different trading environment for many sectors including Tourism and Hospitality as a result of COVID-19.</p>	DoF
<p>Support the industry to press on UKG for flexibility in when and how CBILS loans are repaid so that these are affordable for businesses.</p>	DoF
<p>Consider potential abatement of Tourist Accommodation Certification Fees until 31 March 2022.</p>	TNI
<p>Consider an Escorted Coach and Private Tour Support Scheme to support transport providers dependent upon international tour and cruise business.</p>	TNI
<p>Consider introducing a Business Events Supply Chain Support Scheme to retain the supply infrastructure required to service the business events sector.</p>	TNI
<p>Consider the establishment of a Rent Hardship Scheme to allow landlords to reduce rental charges to hospitality businesses.</p>	DfE



Theme 2: Creating Consumer Confidence

Ensuring that all parts of Northern Ireland’s tourism and hospitality industry provide a welcoming and safe environment for visitors, both domestic and out of state.

Over the course of the pandemic, both Tourism NI and Tourism Ireland have undertaken regular consumer research and sentiment analysis to understand the consumer’s propensity to take a holiday or short break, and what conditions need to be in place for that to happen. The issue of personal safety has consistently been the most important factor in choosing when and where to travel for both domestic and “out-of-state” consumers alike.

The “We’re Good to Go” Charter Mark was introduced across the UK to allow businesses within the tourism and hospitality industry to demonstrate to the consumer that their personal safety is a priority, and that they are committed to the application of Government’s COVID safety guidelines. The ongoing promotion of the scheme both within the industry and to the consumer will be important in securing future business both at home and from abroad.

Action	Responsible / Lead organisation
<p>Deliver the We’re Good to Go Standard:</p> <ul style="list-style-type: none"> • Continue to encourage registration from across the NI tourism and hospitality sectors and conduct monitoring regime. • Continue to reassure consumers of the safety of NI through ongoing consumer promotion of the standard. 	TNI
Develop a Digital Hub to provide the essential data analytics required by the industry to respond to market conditions.	TNI
Deliver an agile Research and Insights Programme to provide a robust evidence base for TNI, industry and stakeholders.	TNI/TI

Theme 3: Stimulating Consumer Demand

Using Northern Ireland’s world class tourism and hospitality product (people and places) to stimulate consumer demand, and essential consumer revenue.

For the industry to recover it will be important that there is increased investment in the promotion of Northern Ireland as an attractive and desirable tourism destination, both in the domestic and out-of-state markets.

Given the impact of COVID on the tourism and hospitality industry across the globe, almost every destination in the world will be seeking to rebuild their market share to pre-pandemic levels in order to secure the recovery of their respective industries. Given what’s at stake, the level of competition across the globe will be greater than it has ever been.

Demand from close to home markets will recover first, and phase two of the Action Plan seeks to ensure that Tourism NI and Tourism Ireland are adequately resourced to generate demand in the Republic of Ireland and in Great Britain.

It will be important that accommodation providers, visitor attractions and other experience providers are also active in the marketplace to convert the interest generated by destination marketing campaigns into bookings. In order to support this, Tourism NI’s Co-operative Marketing Fund will be extended to support the marketing activity of businesses in NI, the ROI and GB. This Fund will also be extended to include Councils and Destination Management Organisations to maximise the investment in destination marketing and heighten its impact through the cohesive promotion of regions and council areas under the “Northern Ireland – Embrace a Giant Spirit” Experience Brand.

Whilst the immediate focus will be on securing business in 2021, recovery will also require international tour operators and travel agents to promote Northern Ireland within their 2022 marketing programmes. This plan includes a series of actions to support overseas operators in building awareness of Northern Ireland with consumers wishing to travel next year and beyond.

Phase two of the Action Plan also recognises the important role played by business tourism and includes a series of actions which build upon the investment of the phase one actions. These are aimed at retaining conferences that had previously been booked for Belfast and have been postponed, securing new conference activity, revitalising the incentive travel market and building upon the opportunity to tap into the large corporate meetings market in the UK and Ireland.



Action	Responsible / Lead organisation
Deliver a consumer marketing programme in NI (and the Republic of Ireland when the time is right) including campaigns, social media, destination PR and influencer marketing.	TNI
Deliver a “NI Holiday at Home” Voucher Scheme to stimulate demand from NI residents to staycation in NI in support of the tourism industry.	TNI
<p>Deliver a range of supports to support the NI industry to recover business tourism. Including:</p> <ul style="list-style-type: none"> • Increasing the level of financial support available under the Conference Support Scheme • The production of specific content to promote NI business tourism destinations on virtual platforms • Support for site inspections to provide organisers with the reassurance that venues can meet the expectations of the conference promoters • Support for an updated Ambassador Programme to attract conference business • Provision of an incentive support fund to develop NI Incentive business • Marketing support for Professional Conference Organisers and Destination Management Companies, who play a vital role in selling and marketing NI as a MICE destination internationally • Investment to secure corporate meetings and events which allow Invest NI to promote NI as a prime investment location for businesses in their target FDI business sectors 	TNI
<p>Market Access Programme</p> <ul style="list-style-type: none"> • Support for NI industry participation on Tourism Ireland sales platforms in the international marketplace 	TNI/Tourism Ireland
<p>Tour Operators</p> <ul style="list-style-type: none"> • Deliver a marketing support programme for Tour Operators to secure additional business for NI from international markets • Deliver a Marketing Support Programme for Golf Tour Operators to increase visitor spend from international markets 	TNI/Tourism Ireland

Provide a NI Marketing Partnership Fund to support alignment of marketing activities of Destination Management Organisations and councils under Northern Ireland Embrace a Giant Spirit for maximum impact in the marketplace.	TNI
Undertake marketing programmes in GB and international core markets, to increase international visitor numbers, when consumer sentiment indicates this is appropriate.	Tourism Ireland
Develop a NI Events Strategy to build on successes to date and maximise the tourism potential of large-scale events.	TNI/DfE

Theme 4: Safeguarding Connectivity

Recognising the critical importance of Northern Ireland's air and sea connectivity to the tourism and hospitality industry.

As an island destination, sea and air access are critical elements of the tourism infrastructure. Northern Ireland's dependency on sea and air connectivity is highlighted by the fact that, in 2019, over 53% of all tourism spend came from visitors from outside the Island of Ireland.

The COVID-19 pandemic has resulted in a catastrophic reduction in global connectivity with air traffic into Northern Ireland's three airports having been reduced by 85% since the onset of the pandemic in early 2020. UK to Ireland sea transportation also reduced by 49% in 2020. Dublin Airport (an important entry point for visitors accessing NI from Europe and the United States) has also seen passenger numbers reduce by 78% in comparison to 2019.

The phase two actions recognise the importance of the GB market and that this market is likely to open up ahead of European and long-haul markets. The immediate priority is, therefore, to re-establish GB routes.

If capacity is to be rebuilt, airlines must be able to operate on a profitable basis otherwise aircraft will be diverted to more viable routes. Cooperative marketing will continue to play a key role in helping to generate demand for routes and increasing passenger load factors.

The Action Plan also recognises the industry's request that the NI Executive continues to lobby for a suspension of short haul Air Passenger Duty (APD) within the UK. APD has a disproportionate impact on Northern Ireland as it is for many the only realistic means for travelling to Northern Ireland from other parts of the UK and has the potential to have a negative impact on recovery.

Action

Continue to use Cooperative Marketing to create demand for GB and European routes into Northern Ireland's airports and ports.

Support industry calls that UK Government suspends short haul APD in response to COVID, and also on grounds of regional competitive disadvantage.

Responsible / Lead organisation

Tourism Ireland

DoF/NITA

Implement the Northern Ireland Domestic Aviation Kickstart Scheme (NIDAKS) to support airlines, which is aimed at maintaining and enhancing NI's air connectivity with GB following the pandemic. This is subject to securing the necessary value for money approvals and compliance with the UK's policy on subsidy control and commitments in international trade agreements. NIDAKS will be strictly timebound for summer 2021.

DfE

Improve connectivity in more rural areas by extending next generation access broadband through the roll out and promotion of Project Stratum.

DfE/DAERA

Translink to engage with Tourism NI on local development plans being prepared with Councils to examine the potential for sustainable routes which meet the needs of tourists.

DfI/ Translink/ TNI

Theme 5: Enhancing the Competitiveness of the Region

Providing sustainable and world class visitor experiences which can meet the expectations of the visitor of the future.

Northern Ireland's stunning landscape, its unique culture and heritage and the warmth of the welcome of its people are at the core of our tourism and hospitality offer. Over the past decade, substantial investment in world-class, authentic visitor attractions and world-class events, has enabled Northern Ireland to present itself to global audiences as a stunning destination with a uniquely warm welcome for its visitors.

Phase two of the Action Plan recognises that to succeed in what will be an extremely competitive post-COVID market, we must continually respond to changing consumer demands. Consumer research shows that travellers are increasingly seeking to participate in outdoor activities, explore the landscape and engage with local communities through truly authentic experiences and storytelling.

To respond to these trends, we must invest in infrastructure that can provide greater access to our natural assets, whilst simultaneously ensuring that the resources are in place to ensure that they are managed sustainably for future generations.

Consumers are increasingly seeking sustainable experiences and Northern Ireland is well placed to fulfil these needs and bring benefit to local businesses and communities alike. It is important that, as we plan for recovery, sustainable development is a core principle of everything that we do and we continue to invest in our visitor facilities and experiences to respond to these changing consumer expectations.

This Action Plan recognises the importance of tourism-led regeneration projects which are being taken forward by the Departments for the Economy and for Communities, as well as Local Councils across Northern Ireland, under the City and Growth Deals Programmes. The City and Growth Deals present a unique opportunity for major investment in tourism infrastructure and will build on the success of the investment in the Signature Projects Programme a decade ago. These projects, alongside smaller scale capital investment by both Tourism NI and the Department for Agriculture, Environment and Rural Affairs, will support the development of world class experiences across Northern Ireland, driving regional dispersal and job creation.

The Plan also commits to a comprehensive review of the Northern Ireland tourism product to inform future investment in the development of tourism infrastructure and visitor experiences.

Action	Responsible / Lead organisation
Roll out revised Accommodation and Visitor Experience Quality Assurance schemes aligned with the Northern Ireland Embrace A Giant Spirit brand.	TNI
Develop a Programme of Events that have authentic, local and compelling content with the potential to attract both local and "Out of State" visitors, enhancing Northern Ireland's reputation as a tourism destination.	TNI
<p>Develop a Programme of engagement to involve communities, industry and the visitor.</p> <ul style="list-style-type: none"> • Development of a Northern Ireland wide Community Engagement Programme/ Strategy to ensure a positive welcome for all visitors to local council areas. • Develop an Industry Customer Charter to provide assurance of flexibility to visitors booking a holiday or short break in NI. • Develop and launch a Visitor Charter to encourage respect for the environment and responsible use of the countryside, respect for public health advice, and support for local businesses. 	TNI
As part of the Capital Investment Programme, deliver an Experience Development Programme to support tourism experience providers to invest in new or enhanced experiences that will entice visitors to explore more of what NI has to offer.	TNI
Commission a comprehensive review of the Northern Ireland tourism product offer to identify strengths, gaps, opportunities and impediments to inform future investment in the development of the visitor offering, including a number of major investment opportunities.	TNI
Progress the delivery of key tourism projects across Northern Ireland under the City and Growth Deals to support medium to longer term recovery of the sector. The delivery of this major capital investment programme will support the development of world-class experiences across Northern Ireland, promoting regional dispersal and sustainable tourism.	DfE/ TNI/ councils
Support the completion of Environmental Improvement Schemes in Portrush, Banbridge and Enniskillen and the delivery of new Environmental Improvement Schemes in Belfast, Derry~Londonderry and Warrenpoint.	DfC

Review and refresh the Historic Environment Fund for April 2022, recognising the opportunities to regenerate and revive through heritage to create authentic and distinctive places to visit.

DfC

Through the work of the Ministerial Advisory Group on Architecture and the Built Environment, provide place-making advice and inspiration to continue to improve our built environment and heritage, creating authentic, inclusive, sustainable and animated spaces for people to visit.

DfC

Continue to support the development of our Arts, Heritage and Museums experiences to ensure that authenticity and creativity are core to our tourism offering.

DfC

Ensure our rich culture and heritage is valued and showcased through continued support for Irish language and Ulster Scots language and culture initiatives.

DfC

Continue to invest in the 190 State Care Monuments to make local and international visitor destinations, providing a medium-term strategy by April 2022 which further strengthens links to city and regional growth deals, local councils and communities.

DfC

Promote and enhance sustainable outdoor recreation provision through:

- The DAERA Environmental Challenge Fund (2021/22) to deliver natural heritage projects that support Covid-19 Recovery and Green Growth across Northern Ireland including projects that will support management of increasing levels of recreation tourism.
- The DAERA Rural Affairs Forest Enhancement and Community Trails Development Scheme will support site recreational development and enhancement projects (21/22 and 22/23 subject to budget).
- Promote responsible behaviour messages for those undertaking outdoor recreation visits to the natural environment (alongside the TNI Visitor Charter) through the Right Side of Outside campaign coordinated by Outdoor Recreation NI.
- DAERA and TNI to collaborate on the development of a new DAERA Rural Tourism Investment Scheme to build on the 2014-2020 £10 million Rural Tourism Scheme.

DAERA

**Theme 6:
Enhancing the
Capability of
Businesses**

Supporting businesses in increasing their sales and marketing activity and converting interest generated by Tourism NI through its marketing platforms into business revenue.

The Northern Ireland tourism industry comprises businesses ranging from large international operators through to several thousand small and micro enterprises. They form a complex interdependent ecosystem in which businesses are required to operate individually, and collectively, in a highly competitive global market place.

The environment in which they operate continues to change at a dramatic pace with rapidly changing consumer trends. Digital technology is constantly changing consumers' behaviour in terms of how they research, book, consume and share their travel experiences with family and friends. The advancement and merging of media and digital technologies also provides businesses with a bewildering range of channels with which to access, inform and secure bookings from customers.

Tourists are not a homogenous group of people, they are very diverse and, for Northern Ireland to be successful as a region, it is important that we understand which markets, and segments of those markets, represent our best prospects. It is also important that we understand the motivations of people within those segments and that we develop our experiences so that they can fulfil the expectations of those prospective customers. Our destination marketing and sales activity must be capable of securing their interest and our businesses must be capable of converting that interest into sales.

The businesses must also be capable of operating efficiently to become profitable and grow. Increasingly, businesses are expected to adopt sustainable business practices and these will soon be an essential requirement for every business in the tourism sector.

To succeed in this environment our businesses, both large and small, must acquire a broad range of management skills, have efficient operational management processes in place, have a sophisticated understanding of the market and their customer base and have a strong command of digital technologies and the use of social media.

Phase two of the Action Plan seeks to provide tourism enterprises with support to help develop growth strategies, build their knowledge and management capacity and provide financial support to put those strategies into action.



Action	Responsible / Lead organisation
As part of the Capital Investment Programme, deliver a Website Development Programme targeted at attractions and experience providers to improve their capacity to secure business online.	TNI
Deliver the COVID Digital Innovation and Productivity Programme to support businesses across the tourism sector to enhance their digital capability.	TNI
Deliver a Regenerative Tourism Awareness and Development Programme to support recovery and ensure a proactive response to increased consumer emphasis on sustainable and responsible behaviour and business practice. Aligned with this, financial assistance to support tourism providers to implement sustainability initiatives will be provided under the Kick Start Programme to aid recovery.	TNI
Maximise the capability of Tourism NI and businesses to utilise Tourism Ireland's new Ireland.com website and digital technology platform. This will link online visitor behaviour to actual holiday visitors by delivering intense localised marketing.	TNI/Tourism Ireland
Work with Visit Britain to use TxGB, a centralised booking platform to enable NI businesses to access new markets and manage sales across multiple global distribution channels.	TNI/Visit Britain
Deliver a COVID Recovery Tourism Enterprise Development Programme to support tourism businesses adapt their products and business models to market opportunities and the new operating environment including the development and delivery of an integrated, industry-wide training programme to provide businesses with the required skills.	TNI

Theme 7: Enhancing the Skills of the Workforce

Supporting businesses in the attraction, development and retention of a highly skilled and engaged workforce for whom tourism and hospitality offer an attractive career choice.

As the tourism sector prepares to re-open and recover business lost as a result of COVID-19, the immediate priority for businesses is to rebuild their workforces to respond to anticipated demand.

The Job Retention Scheme introduced by the Government has been generous and has protected the industry from mass redundancies. However many tourism and hospitality businesses have had to endure many months without any source of income and have had no alternative but to reduce their salary costs in order to survive.

As a result, many skilled and experienced workers have left the industry to find alternative employment in other sectors of the economy. Many former employees who originated from outside of the British Isles have decided to return home as a result of COVID and other factors, thus reducing the potential to recruit experienced migrant workers.

Consequently, the industry faces the challenge of attracting and upskilling new employees to meet its future requirements. Delivery of a JobStart Programme will assist the sector in creating new jobs and matching job opportunities to prospective young employees. Tourism and Hospitality Businesses will be supported in accessing the programme and raising awareness amongst employees about the breadth and depth of employment opportunity that the sector can offer.

This plan seeks to support the industry in rebuilding its skills base by committing to ensuring that the labour market can provide a workforce capable of meeting its future needs and by supporting businesses in attracting, developing and retaining a highly skilled workforce that can meet the future needs of both the business and its customers. The HATS network will ensure, through working in partnership with different government departments and agencies, that sector wide skills requirements and career progression paths are effectively communicated and supported.



Action	Responsible / Lead organisation
Deliver a suite of labour market interventions to support people to move towards and into work, developing and enhancing their employability skills.	DfC
Develop safety guidance for the safe return of large scale and outdoor events (when the time is right) - including the production of toolkits, safety videos and engaging content on council websites and tourismni.com.	TNI
Deliver a JobStart Programme to assist the sector in creating new jobs and matching job opportunities to prospective young employees. Facilitate a programme of activity to support Tourism and Hospitality Businesses in accessing the programme and raising awareness with employees on the breadth and depth of employment opportunity.	DfC
Deliver the “Let’s do Tourism and Hospitality” Management Development Programme to support the recovery of the sectors.	DfE/FE Colleges
HATS to work in partnership with DfE to develop sectoral messaging and content on career pathways for inclusion on the new NI careers portal.	DfE/HATS
HATS to input to the development of a suite of flexible interventions to respond to emerging skills needs to include digital, green and management skills.	DfE/HATS
Consider the development of a new entry pathway to Higher level Apprenticeships to build management skills.	DfE
HATS in collaboration with DfC and DfE to review the suite of employment programmes to ensure they respond to sectoral needs and support new job creation.	HATS
HATS in collaboration with DfE, Tourism NI, NI Careers Service, DfC and local Labour Market partnerships to develop and deliver an integrated careers awareness campaign to drive progression, retention and help secure a future talent pipeline.	HATS



Theme 8: Creating a Supportive Policy Environment

Providing a modern, supportive legislative and policy environment aimed at expectations of today’s tourist and best practice in government.

The Northern Ireland tourism and hospitality sector has evolved substantially over the past decade. Consumer preferences and expectations have also developed so that it is important to consider whether government policy and legislative infrastructure effectively underpins a fit-for-purpose tourism industry that can attract visitors to have a world class experience.

This fit-for-purpose industry needs to have a skilled workforce with clear career progression opportunities that result in reduced staff turnover. Reviewing existing tourism delivery to ensure that the legislative and infrastructural framework is in place to futureproof the industry will be key. Introduction of the Licensing Bill will be one aspect of ensuring a customer-centric approach that allows the industry to compete effectively.

Developing a sustainable regenerative tourism strategy to maximise Northern Ireland’s tourism potential will be a seminal part of phase two of the Action Plan. The Covid-19 pandemic has created a space for reflection for tourism bodies and the industry on a global level resulting in a unified focus on sustainability and regeneration. Working in collaboration on how we can deliver more successful sustainable economic, social and environmental outcomes will be critical to ensuring Northern Ireland’s identity as a world class tourism destination.

This Action Plan also supports the development of underpinning strategies to ensure that sport and physical activity and the culture, arts and heritage offering to our communities and visitors are enhanced to provide an infrastructure that we can be proud of.

Action	Responsible / Lead organisation
Develop a Sustainable Regenerative Tourism Strategy to maximise Northern Ireland’s tourism potential.	DfE/TNI/TI
Scope a review of tourism delivery mechanisms required to meet the future needs of the tourism sector, including the Tourism Order, funding schemes and delivery structures.	DfE

7. Next Steps

This Plan sets out an ambitious programme of work across Government and other stakeholders to support the recovery of the tourism industry and help it return to growth and profitability.

It also represents a significant investment by the NI Executive in the development of the sector. Many of the actions within the Plan build upon the work done in phase one of the Recovery Plan and others are already underway, such as the Domestic Marketing Campaign. Delivery of the Plan will require close collaboration.

The partnership approach across government departments, councils, industry and the further education colleges to develop this plan provides a solid foundation to grow this vital sector of our economy and help us to compete successfully in what will be a very competitive global market place when travel restrictions are finally removed.

The Tourism Recovery Steering Group, Working Group and supporting Task and Finish Groups were established last year at the outset of the pandemic. As we are now moving forward into recovery, assisted by the implementation of this Plan, the time is right to look afresh at what structures would best harness the views of the sector and support the policy making function. Officials have, therefore, been tasked with bringing proposals to the Economy Minister in coming weeks.

Tourism Recovery Task Force
May 2021

Complete the process for the introduction of the Licensing Bill which will extend opening hours for pubs and hotels, will remove additional restrictions over Easter and will provide flexibility to cater for major events such as The Open championship.

DfC

Launch a new strategy for sport and physical activity - a key emphasis for this new strategy will be the provision of quality accessible sporting venues and outdoor spaces. It also includes the need to ensure that NI is recognised as a place that can host sporting events, providing modern world class facilities and one that offers access to outdoor venues for sport and recreation.

DfC

Develop a Culture, Arts and Heritage Strategy that will provide an overarching approach to recovery and renewal for the sectors which are vital to residents and visitors.

DfC

Work with industry to assess the impact of Brexit on the tourism and hospitality industry and identify potential mitigations where possible.

DfE/TNI

Refresh Tourism Satellite Accounts and use to inform policy making.

DfE

Consider options available through Levelling Up Fund for Northern Ireland and UK Shared Prosperity Fund.

TNI

Establish a skills group for tourism and hospitality to assess the current and future skills needs of the sector. This group will report directly to the NI Skills Council.

DfE

Consider widening access to apprenticeships for older workers by removing the age cap to support employee development, career progression and retention.

DfE

Consider establishing public sector apprenticeships in tourism to support employee development, career progression and retention.

DfE

8. Annex 1: Membership of TRSG & TRWG

Tourism Recovery Steering Group.

Name	Organisation
Chair Diane Dodds MLA,	Minister for the Economy
Joanne Stuart	CEO, Northern Ireland Tourism Alliance
Janice Gault	CEO, NI Hotels Federation
Colin Neill	CEO, Hospitality Ulster
Katy Best	NI Representative, Visit Britain
Terence Brannigan	Chair Tourism NI
John McGrillen	CEO, Tourism NI
Niall Gibbons	CEO, Tourism Ireland
David Jackson	Chair, SOLACE
Paul Grocott	Director, Economic Policy Group, DfE
Geraldine Fee	Director Tourism and Telecoms, DfE
Trevor Connolly	Director, Business Engagement, DfE
Graeme Wilkinson	Director, Skills, DfE
Victor Dukelow	Director, Analytical Services, DfE
Sue Gray / Colum Boyle	Permanent Secretary, Department of Finance (DoF)
Moira Doherty	Deputy Secretary, Department for Communities (DfC)
Fiona McCandless	Deputy Secretary, Department of Agriculture, Environment and Rural Affairs (DAERA)
Tim Losty	Director of International Relations, TEO
Liz Loughran	Director of Transport Policy, Department for Infrastructure (DfI)

Tourism Recovery Working Group.

Name	Organisation
Chair John McGrillen	Tourism NI
Suzanne Wylie	SoLACE (BCC CEO)
Shane Clarke	Tourism Ireland
Roisin McKee	HATS Network
Joanne Stuart	NI Tourism Alliance
Janice Gault	NI Hotels Federation
Colin Neill	Hospitality Ulster
Gerry Lennon	Visit Belfast
Rob Rankin	Incoming Tour Operators Association (ITOA)
Odhran Dunne	Visit Derry
Tanya Cathcart	Fermanagh Lakelands
Judith Owens	Titanic Belfast Limited
John Hood	Invest NI
Heather McLachlan	National Trust
Michele Shirlow	NI Good Food
Albert Harrison (Air & Sea Connectivity T&F Group Chair)	City of Derry Airport
Karen Magill (Ground Transport T&F Group Chair)	Federation of Passenger Transport Northern Ireland (FPTNI)
Brian Murphy (Hospitality T&F Group Chair)	BDO NI
Stephen Meldrum (Accommodation T&F Group Chair)	NI Hotels Federation
Adrian Doyle (Events T&F Group Chair)	Odyssey Trust
David Boyce (Trade T&F Group Chair)	Tourism Ireland
Oonagh O'Reilly (MICE T&F Group Chair)	International Convention Centre (ICC)
Laura McCorry (Attractions and Venues T&F Group Chair)	Historic Royal Palaces

Phil Ervine (Small Experience Providers T&F Group Chair)	Taste and Tour
Aileen Martin (Golf T&F Group Chair)	Hastings Hotels
John Simms	DfE Tourism Policy
Laura Loughridge	DfE Air Connectivity
Helen Anderson	Director, Natural Environment Division, DAERA
Paul Donnelly	Director, Rural Affairs Division, DAERA
Maeve Walls	Director, Culture, DfC

9. Annex 2: Glossary

Name	Organisation
APD	Air Passenger Duty
CBILS	Coronavirus Business Interruption Loan Scheme
DAERA	Department of Agriculture, Environment and Rural Affairs
DfC	Department for Communities
DfE	Department for the Economy
DfI	Department for Infrastructure
DoF	Department of Finance
ERAP	Economic Recovery Action Plan
FDI	Foreign Direct Investment
GB	Great Britain
HATS	Hospitality and Tourism Skills
MICE	Meetings, Incentive, Conferences and Events
NI	Northern Ireland
NIDAKS	Northern Ireland Domestic Aviation Kickstart Scheme
ROI	Republic of Ireland
TRSG	Tourism Recovery Steering Group
TRWG	Tourism Recovery Working Group
UK	United Kingdom