

# tourism in northern ireland



a strategic framework for action 2004 - 2007

## minister's foreword



**Ian Pearson MP, Minister with responsibility for Enterprise, Trade and Investment**

Tourism has the capacity to become a key sector in the transformation of Northern Ireland and to contribute significantly to economic growth. This will only happen if we develop and market a world class visitor experience, continually strive to provide a high quality and competitive product and do so in a sustainable way.

Over the past five years, the number of overseas visitors to Northern Ireland has grown at almost three times the rate experienced by our near neighbours in the Republic of Ireland. We are starting from a lower base but I am optimistic that this growth trend will continue and that tourism will take its rightful place as a significant economic driver for Northern Ireland over the coming years. An equally important growth area is our domestic market, encouraging more people from Northern Ireland to take holidays and leisure breaks at home

We cannot underestimate the challenge associated with convincing more visitors to come here, making sure that they enjoy a world class experience once they arrive and that they become lifelong ambassadors for what Northern Ireland has to offer. At the core of this strategic framework is the importance of working together – as an industry and as government – focusing on delivery.

We live in a new Northern Ireland. There is now a unique and timely opportunity for tourism to take a lead as we go forward. This strategic framework is a significant first step and I commend it to you.

“we live in a new **northern ireland...**”

## chief executives' foreword



**Alan Clarke, Chief Executive,  
Northern Ireland Tourist Board**

In fulfilment of its role as the lead body for tourism in Northern Ireland, the Northern Ireland Tourist Board has prepared this strategic framework for action. The framework deliberately concentrates on identifying the most effective response to the challenge of attracting visitors, increasing the competitiveness of tourism businesses and stimulating effective communication with our industry partners.

While NITB has led the preparation of the strategic framework, it is intended for all of those involved in the business of tourism whose contribution is so critical to success. The deliberate emphasis on priorities will ensure that our collective energy is focused to maximum effect and that full advantage is taken of the opportunity presented.



**Paul O'Toole, Chief Executive,  
Tourism Ireland**

Tourism Ireland believes wholeheartedly in the potential of Northern Ireland. Tourism in Northern Ireland is now at a crossroads, with the unique opportunity to map out a new vision for itself, an opportunity to bring together all the required stakeholders to turn that vision into reality, and an opportunity to promote that new reality overseas in a way that was never possible before.

Tourism Ireland looks forward to contributing fully to this process at each step of the way.



## Where we are today

In 2002 tourism contributed £395m to the Northern Ireland economy, of which £274m was spent by visitors and £121m by people from Northern Ireland who took their holidays at home. Tourism supports around 20,000 full-time equivalent jobs. The sector represents approximately 2% of GDP.

## Our Tourism Challenge

The challenge for tourism in Northern Ireland is to attract more visitors and then make their stay memorable so that they are encouraged to return and to recommend Northern Ireland. It is also important to encourage people from Northern Ireland to take holidays and leisure breaks at home.

## Our Objectives

In line with NITB's Corporate Plan, the strategic framework's target is to increase visitor tourism revenue by 9% every year, visitor numbers by 7% and to increase Northern Ireland's share of visitors to the island of Ireland. The framework sets out the steps needed to address this challenge. It will deliver improvements in tourism performance across three key objectives of **Attracting Visitors, Business Enhancement and Communicating Effectively**.

## Our Principles

The strategic framework provides guidance on the development of tourism over the next three years. In adopting a **sustainable** approach it seeks to strike a balance between economic growth,

impact on the environment and community support. The approach is **customer focused** and **market driven** in that it recognises the need for high quality, excellence and a personal approach in everything we do. Success will depend on everyone involved in tourism **working together**, focusing and resourcing efforts and measuring results. The outcome will be a balanced business strategy.

## Action Programmes

The strategic framework will be delivered through **ten programme areas** – four relating to attracting visitors, four relating to business enhancement and two relating to communication. Each programme area will be supported by a range of action plans designed to deliver on the targets for growth. Each programme area will be measured and a mechanism to ensure implementation will be established by NITB.

New working arrangements will mean that actions are carried out by those best placed to deliver - centrally, regionally and locally. Action programmes will run from April 2004 until March 2007.

## Making it Happen

This framework will require commitment across the public and the private sectors, both centrally and regionally. As the strategic leader for tourism in Northern Ireland, this will mean a new focus for NITB as catalyst, co-ordinator and facilitator, properly resourced and skilled.



“... a world class visitor experience”

# the strategic framework at a glance

Attracting Visitors Marketing the best to promote the rest		Business Enhancement Working together to deliver our promises		Communicating Effectively 'One voice' tourism		
Programme Areas	<b>1 Know the Visitor</b> market intelligence	<ul style="list-style-type: none"> <li>✓ Adapt to the changing visitor</li> <li>✓ Make intelligence based investments and decisions</li> <li>✓ Inform our industry and encourage customer focus</li> </ul>	<b>5 Develop Signature Projects</b> deliver international 'stand out' for Northern Ireland	<ul style="list-style-type: none"> <li>✓ Giant's Causeway/Antrim and Causeway Coast area</li> <li>✓ Titanic/(Maritime) Belfast</li> <li>✓ Walled City of Derry</li> <li>✓ Christian Heritage/Saint Patrick</li> <li>✓ Mourne National Park area</li> </ul>	<b>9 Share Information</b> tell others about our successes	<ul style="list-style-type: none"> <li>✓ Proactive PR activity</li> <li>✓ Celebrate and showcase success</li> <li>✓ Set up opportunities and channels for information delivery</li> </ul>
	<b>2 Develop a Compelling Proposition</b> build and maintain a strong brand identity	<ul style="list-style-type: none"> <li>✓ Position and differentiate Northern Ireland – 'stand out'</li> <li>✓ Northern Ireland brand study</li> <li>✓ Tourism as the leader in influencing the perception of NI</li> <li>✓ Winning themes and signature projects as brand drivers</li> </ul>	<b>6 Focus on Winning Themes</b> deliver a competitive advantage for Northern Ireland	<ul style="list-style-type: none"> <li>✓ Short breaks</li> <li>✓ Excellent events</li> <li>✓ Business tourism</li> <li>✓ Activity tourism</li> <li>✓ Culture and heritage tourism</li> </ul>	<b>10 Strengthen Effective Relationships for Delivery</b> work together	<ul style="list-style-type: none"> <li>✓ NITB as strategic leader for tourism in Northern Ireland</li> <li>✓ Define and clarify roles and responsibilities for delivery</li> <li>✓ Build confidence and trust</li> </ul>
	<b>3 Reach the Consumer</b> our best prospects	<ul style="list-style-type: none"> <li>✓ Three tiered approach</li> <li>✓ Segmentation exercise</li> <li>✓ Maximise market/product fit</li> <li>✓ Personalised approach using leading edge technology</li> </ul>	<b>7 Develop Internationally Competitive Businesses</b> focus on quality	<ul style="list-style-type: none"> <li>✓ Business audit and development programmes</li> <li>✓ A selective approach to development</li> <li>✓ Use NITB and Invest NI business development support</li> </ul>		
	<b>4 Take Care of our Visitors – every step of the way</b> first and lasting impressions	<ul style="list-style-type: none"> <li>✓ Gain a competitive advantage</li> <li>✓ Make it easy to get here and get around</li> </ul>	<b>8 Deliver Memorable Experiences</b> the less tangible side of tourism	<ul style="list-style-type: none"> <li>✓ Fulfil visitor expectations</li> <li>✓ Develop people and skills</li> <li>✓ Business leadership programmes</li> <li>✓ Go that extra mile</li> <li>✓ An integrated approach</li> </ul>		

Attracting Visitors	Marketing the best to promote the rest
<b>Why?</b>	<b>What needs to be done?</b>
<p><b>1 Know the Visitor</b></p> <p>Good <b>market intelligence</b> appropriately interpreted and disseminated will enable the industry to target its efforts and resources at those segments that have the greatest ability to maximise tourism revenue and potential from all of our key markets.</p> <p><b>Our key partners in delivery will be Tourism Ireland, VisitBritain and regional tourism partnerships (to include key stakeholders for the delivery of tourism programmes)</b></p>	<p>✓ <b>Adapt to the changing visitor</b> Northern Ireland is a changing destination, how is the profile of our visitors changing? Increasing trend towards shorter breaks taken more often; increase in the time-constrained consumer; increase in the older (over 55s) consumer; changes in lifestyle; changes in purchasing behaviour; a greater interest in the environment.</p> <p>✓ <b>Make intelligence based investments and decisions</b> Match marketing and development to customer requirements (current and future).</p> <p>✓ <b>Inform our industry and encourage customer focus</b> Effective marketing is underpinned by good market intelligence. We need to provide the industry with more timely and more relevant information and tools for their planning.</p>
<p><b>2 Develop a Compelling Proposition build and maintain a strong brand identity</b></p> <p>A strong and clear brand, reinforced by the use of common messages and images will enable the industry to adopt a more consistent approach.</p> <p><b>Our key partner in delivery will be Tourism Ireland</b></p>	<p>✓ <b>Position and differentiate Northern Ireland</b> If we are to achieve 'stand out' for Northern Ireland and maximise our competitive advantage, we need to be conscious of how we portray ourselves. We need to take proactive measures to improve our image at home and abroad.</p> <p>✓ <b>Northern Ireland brand study</b> Identify our key attributes, strengths, weaknesses and unique assets.</p> <p>✓ <b>Tourism as the leader in influencing the perception of Northern Ireland</b> Use success stories in tourism to build reputation, ownership and pride/proactively use events and journalist visits.</p> <p>✓ <b>Winning themes and signature projects as brand drivers</b> Develop and market distinctive Northern Ireland products.</p>



Attracting Visitors	Marketing the best to promote the rest
Why?	What needs to be done?
<p><b>3 Reach the Consumer</b></p> <p>We must convert <b>our best prospects</b> in the marketplace into visitors on the ground. We must ensure that we use the right tools to target the right people, in the right way, in the right place and at the right time.</p> <p>A three tiered approach will provide us with a framework to focus our marketing efforts and resources.</p> <p><b>Our key partners in delivery will be Tourism Ireland in overseas markets and regional tourism partnerships</b></p>	<p>✓ <b>Three tiered approach to realise the potential of our ‘best fit’ target markets:</b></p> <p><b>Tier 1</b> Our domestic and closer to home markets, specific overseas segments already delivering results (including VFR), as well as those with direct access</p> <p><b>Tier 2</b> Segments that match with our internationally competitive products, for example current focus includes Sweden and golf; Germany and cruising; France and angling; Italy and English as a foreign language</p> <p><b>Tier 3</b> Maximising the potential of key emerging segments in international markets (future tier 1 and 2 markets)</p> <p>✓ <b>Segmentation exercise</b> Use information on where our target consumers are in the decision making process to guide marketing tactics for each tier.</p> <p>✓ <b>Maximise market/product fit with compelling campaigns and clever packaging</b> Work with Tourism Ireland and VisitBritain to make the most of what we have now and to plan for best fit in the future.</p> <p>✓ <b>Personalised approach using leading edge technology</b></p> <ul style="list-style-type: none"> <li>• Product database (content, distribution and key links)</li> <li>• Customer database and Customer Relationship Management</li> </ul>
<p><b>4 Take Care of our Visitors – every step of the way</b></p> <p>We must ensure positive <b>first and lasting impressions</b>, aiming to exceed visitor expectations. We need to make it easy for our visitors, from the first point of contact onwards.</p> <p><b>Our key partners in delivery will be DETI, DRD and regional tourism partnerships</b></p>	<p>✓ <b>Gain a competitive advantage through:</b></p> <ul style="list-style-type: none"> <li>• Initial impressions and welcome on arrival</li> <li>• Visitor information – content, availability and dissemination</li> <li>• Visitor servicing – high quality and leading edge</li> <li>• Deliver a memorable experience worth paying for</li> </ul> <p>✓ <b>Make it easy to get here and get around – international access and integrated transport</b></p> <ul style="list-style-type: none"> <li>• Access and transport – it is essential that direct access into NI is increased and improvement made to transport linkages</li> <li>• Booking mechanisms – easy and available</li> <li>• Signage – a customer focused approach</li> </ul>



Business Enhancement	Working together to deliver our promises
<p><b>Why?</b></p>	<p><b>What needs to be done?</b></p>
<p><b>5 Develop Signature Projects</b></p> <p>Signature projects have been identified for their potential to deliver world-class excellence, drawing visitors from home and overseas.</p> <p>We need to work with our strategic partners to promote the development of these investment intensive signature projects. In achieving <b>international ‘stand-out’</b> the projects will have a significant impact on Northern Ireland’s tourism performance.</p> <p><b>Our key partners in delivery will be stakeholders with relevant expertise and experience for each signature project</b></p>	<p><b>A number of best prospect signature projects have been identified for progress in the short to medium term:</b></p> <ul style="list-style-type: none"> <li>✓ Giant’s Causeway/Antrim and Causeway Coast area</li> <li>✓ Titanic (Maritime)/Belfast</li> <li>✓ The Walled City of Derry</li> <li>✓ Christian Heritage/Saint Patrick</li> <li>✓ Mourne National Park area</li> </ul> <p><b>We will seek to promote the identification of additional signature projects as longer term opportunities.</b></p>
<p><b>6 Focus on Winning Themes</b></p> <p>Winning themes are those with potential to help deliver a <b>competitive advantage</b> for Northern Ireland.</p> <p>We need to work with our strategic partners to develop winning themes that match market requirements with the ability of Northern Ireland’s various regions to deliver.</p> <p><b>Our key partners in delivery will be stakeholders with relevant expertise and experience for each winning theme</b></p>	<ul style="list-style-type: none"> <li>✓ <b>Short breaks</b> In the city, in the countryside, in key resorts. Patterns confirm a continued growth in shorter breaks. In 2002, Republic of Ireland holiday visitors generated £11m in NI, while GB residents on holiday generated a further £15m. Domestic short breaks in NI using commercial accommodation were worth around £50m in 2002</li> <li>✓ <b>Excellent events</b> Research confirms that events are an effective tool for changing perceptions and attracting visitors – particularly off-season. Working with key strategic partners (such as the Northern Ireland Events Company and local councils), we will identify new opportunities to showcase excellence and plan investment requirements.</li> <li>✓ <b>Business tourism</b> Business tourism is worth £16 billion in the UK today and has potential far beyond the conference or event itself. Business tourists spend on average three times more than leisure visitors, making this the most lucrative, high spend, high yield form of tourism. In 2002, 30% of NI visitors came on business and generated £99m. Our focus here will be on conferences, meetings and incentive travel, to allow more potential for discretionary spend.</li> <li>✓ <b>Activity tourism</b> Activity tourism brings significant benefits with regard to regionality and seasonality. In addition, activity tourists tend to be high spending. For example, golf trips generate around £13–14m a year for Northern Ireland. The variety and distinctiveness of Northern Ireland’s natural resources – our rural areas and lakelands – offer opportunities for tourism growth. We will therefore focus on current strengths and build future winners.</li> <li>✓ <b>Culture and heritage tourism</b> Almost 200,000 visitors participated in culture and heritage activities in 2002. The figures in the Republic of Ireland reached almost 1.7 million indicating that there is potential for growth within this key sector. We will work with key strategic partners to promote the opportunities presented.</li> </ul>

Business Enhancement	Working together to deliver our promises
<p><b>Why?</b></p>	<p><b>What needs to be done?</b></p>
<p><b>7 Develop Internationally Competitive Businesses</b></p> <p>We need to ensure that tourism businesses are capable of competing effectively in the international marketplace. Using models of international best practice with a <b>focus on quality</b> we need to provide strategic advice on prospects for growth, product development and packaging for tourism businesses. These should include service and facility or accommodation providers as well as businesses centred around visitor attractions.</p> <p><b>Our key partners in delivery will be Invest NI, DEL, DCAL, NITIC and TTT</b></p>	<p>✓ <b>Business audit and development programmes</b></p> <p>We need to use a selective approach to develop international competitiveness:</p> <p><b>Short term</b> Look for a small number of immediate opportunities, focus on best practice and positive performance with good strategic fit to winning themes. Use these opportunities to generate energy and ‘noise’ both at home and away. Start with quickly achievable goals so as to build confidence.</p> <p><b>Medium term</b> Encourage and assist both new and established businesses of all kinds to deliver exemplary product quality and business processes. Focus on improving quality, presentation and service to bring more businesses up to international standard.</p> <p><b>Long term</b> Nurture, work with and assist businesses to develop long term strategies, focusing on growth through excellence so that they become ‘stars’ of tomorrow.</p> <p>✓ <b>Use NITB and Invest NI business development support</b> Quality schemes and networks (e.g. food tourism), benchmarking and business support to develop excellence in conjunction with key partners</p>
<p><b>8 Deliver Memorable Experiences</b></p> <p>We need to recognise and develop the <b>less tangible side of tourism</b>, with an emphasis on people qualities as a source of added value.</p> <p>This will mean identifying programmes to enhance hospitality, foster business acumen and encourage professionalism.</p> <p><b>Our key partners in delivery will be Invest NI, DEL, TTT and NITIC, as well as Northern Ireland media</b></p>	<p>✓ <b>Fulfil visitor expectations by ensuring the experience is:</b></p> <ul style="list-style-type: none"> <li>• Imaginatively packaged</li> <li>• Customer focused</li> <li>• Worth paying for</li> </ul> <p>✓ <b>Nurture people and skills</b> Opportunities, capabilities, career development and training (to include marketing, sales, customer care and e-business).</p> <p>✓ <b>Business Leadership Programmes</b> Including training for leaders to value, recognise and reward the behaviours that will deliver high levels of visitor satisfaction and memorable experiences.</p> <p>✓ <b>Go that extra mile</b> Encourage Northern Ireland’s best asset - its people - to become part of that special memory.</p> <p>✓ <b>An integrated approach</b> Align hospitality and tourism training with business needs.</p>

Communicating Effectively	'One voice' tourism
<b>Why?</b>	<b>What needs to be done?</b>
<p><b>9 Share Information</b></p> <p>We need to find new ways to <b>tell others about our successes</b>.</p> <p><b>Our key partners in delivery will be regional tourism partnerships</b></p>	<ul style="list-style-type: none"> <li>✓ <b>Proactive PR activity</b> to communicate our achievements and highlight tourism heroes</li> <li>✓ <b>Celebrate and showcase success</b> tourism and business awards to acknowledge and promote best practice</li> <li>✓ <b>Set up opportunities and channels for information delivery</b> <ul style="list-style-type: none"> <li>• stakeholder survey to establish models of best practice</li> <li>• encourage networking amongst those involved in the industry</li> </ul> </li> </ul>
<p><b>10 Strengthen Effective Relationships for Delivery</b></p> <p>To ensure the success of this strategy key stakeholders need to <b>work together</b> to determine who is best placed to deliver. Our focus should be on more effective ways of working, to maximise impact and reduce duplication; sharing responsibility in order to share success.</p> <p><b>Our key partners in delivery will be DETI, and regional tourism partnerships</b></p>	<ul style="list-style-type: none"> <li>✓ <b>NITB as the strategic leader for tourism in Northern Ireland</b> <ul style="list-style-type: none"> <li>• Work together (centrally and regionally) to align policies and marshal resources with action programmes. For example funding will only be given where there is a good strategic fit</li> <li>• Develop a more focused and integrated framework for regional and local delivery</li> <li>• Develop public and private partnerships to deliver winning themes and signature projects</li> </ul> </li> <li>✓ <b>Delivery</b> Define and clarify roles and responsibilities.</li> <li>✓ <b>Build confidence and trust</b> A healthy flow of information to key community and media contacts from whom we need buy in. Including launch and update events.</li> </ul>

## acknowledgements

This strategic framework for action is the outcome of a sustained period of consultation with our colleagues in the industry, our strategic partners, and a range of stakeholders. The Northern Ireland Tourist Board is grateful to all those who invested their time, effort and knowledge in its development.

A special word of thanks goes to the members of the Industry Steering Group whose individual expertise, wisdom and experience contributed so much to the development of the framework.

**We would like to hear from you!**

Please give us your comments on our proposed way forward. Use the method of your choice to get in touch with Stephen Bill at NITB by 22 December 2003.

**Stephen Bill  
Northern Ireland Tourist Board  
St Anne's Court  
59 North Street  
Belfast  
BT1 1NB**

**Email: [s.bill@nitb.com](mailto:s.bill@nitb.com)  
Fax: 028 9031 5951  
Telephone: 028 9089 5529**

You can download this document as text/pdf from [www.nitb.com](http://www.nitb.com)



The text in this document has been printed in line with RNIB Guidelines 'See It Right'.

This document can be made available on request in Braille, audio, large print, computer disk and pdf. Or download text/pdf versions from [www.nitb.com](http://www.nitb.com)

ISBN: 1 86193 196 4

3m/10/03

Printed on environmentally friendly paper



This publication has been part funded by contribution through the EU Building Sustainable Prosperity Programme for Northern Ireland

