

Appendix 1

Campaigning for Tourism

One voice. One team.

Bringing employment to all regions, new facilities
to our towns and cities.

Creating opportunities in rural areas.

A source of pride for the people of Northern Ireland.



www.nitb.com

Introduction

2020 Tourism

Travel and tourism is a key driver of the global economy. More than **1 billion people**¹ travel every year. It is now estimated that travel and tourism contributes more than **US\$ 5.75 trillion** to world economic activity – just over **9% of global GDP**. Travel and tourism supports **236 million jobs worldwide** - just over **8% of jobs globally**².

Over the past ten years, Northern Ireland has fought hard for its share of the growing travel and tourism market and has done remarkably well. Today over 3 million visitors spend more than five hundred million pounds annually on the Northern Ireland experience but

we believe we can do...much better.

By 2020 a focused effort could **increase employment supported by tourism to 50,000 jobs**, the number of **visitors to 4.5 million** and **generate £1 billion** for the Northern Ireland economy every year - this is a serious industry.

The priorities and actions required to realise this potential are laid out in the new **Tourism Strategy for Northern Ireland 2010–2020** led by the Department for Enterprise, Trade and Investment. This strategy must be underpinned by the right resources and a new, shared approach adopted across the sector. Within this context one of the major challenges will be sustained government investment, given the likely significant pressure on public sector spending from 2010/11 onwards.



Howard Hastings, Chairman, NITB

Tourism benefit to the Northern Ireland economy

Tourism offers unparalleled potential to generate growth and create jobs across Northern Ireland. As a labour intensive industry it brings employment to all regions, new facilities to our towns and cities, creates opportunities in rural areas and is a source of pride for the people of Northern Ireland.

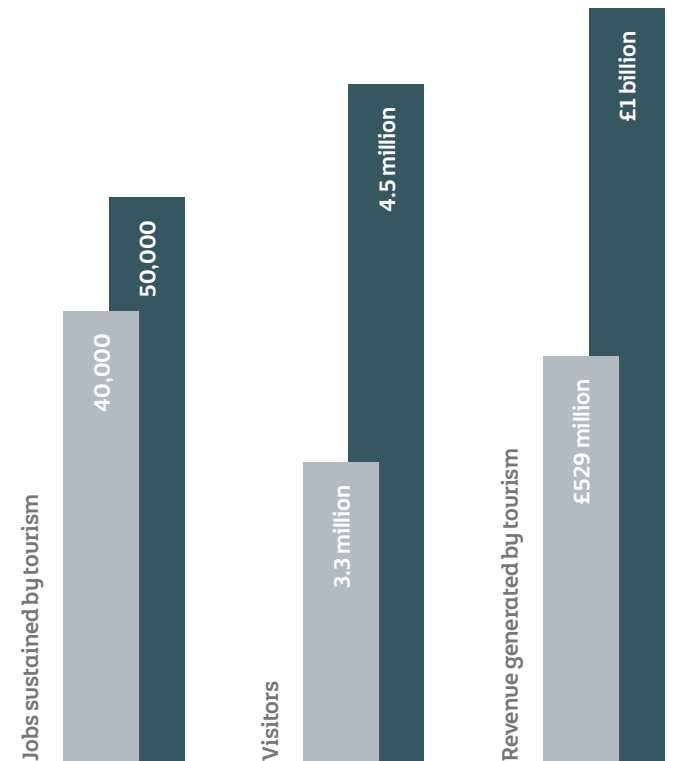
What is tourism delivering today?

- The total revenue generated by the NI tourism industry is **£529m**
- Tourism contributes **4.9% to Northern Ireland's GDP** (gross domestic product)
- In 2009, **1.4m** domestic visitors generated **£192m**
- In 2009, **1.9m** out of state visitors spent **£337m**
- Over **40,000 jobs** are sustained by tourism activity
- One in 18 jobs in Northern Ireland is directly supported by the Visitor Economy
- Every **£1m** generated through tourism supports an additional 25.5 jobs
- People are employed by tourism right across Northern Ireland, in every constituency, at every skill level

What can tourism be in 10 years?

- The total revenue generated by the tourism industry is **£1bn**
- **4.5 million** visitors
- Over **50,000** jobs sustained by tourism activity
- Everyone's business and a source of civic pride
- A career of choice

Today vs Tomorrow



Realising our potential

Create opportunities for visitors to spend money

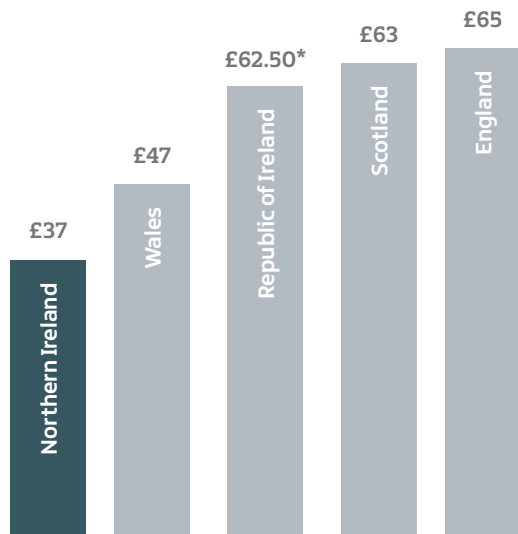
Competitor destinations are highly skilled at persuading visitors to spend money. In the Republic of Ireland visitor spend per head is £62.50, in Scotland £63, in England £65 and in Wales £47. This compares to £37 per head in Northern Ireland. We must exploit the opportunities to encourage our visitors to spend more while they are with us. This is the goal that drives these investment priorities.

2012 : A Titanic year for tourism

By 2012 almost £300 million will have been invested in tourism infrastructure over a five year period, largely from the public sector. This includes the Titanic Signature Building, the Giant's Causeway Visitor Experience, the Ulster Museum, the Ulster Hall, the City Hall, the MAC, the Lyric Theatre, the Built Heritage Programme and city lighting scheme in Londonderry, Newcastle Promenade, World Police and Fire Games and Lough Erne Golf Resort.

By 2012-13 we will have a 'critical mass' of things to see and do, offering a genuinely new experience. We must now capitalise on the investment already made and exploit it in order to achieve our vision for 2020.

Spend per Visitor



* figure based on 2009 average exchange rate



Ulster Museum, Belfast



Titanic Signature Building, Belfast



Giant's Causeway Visitor Experience, Co Antrim



Lyric Theatre, Belfast



The MAC, Belfast

Calling on you

To help the tourism industry achieve our goals we need to collectively position our challenges and priorities.

We the Board of NITB are asking you to join us in advocating for change in those areas that impede our growth and challenge our competitiveness.

Policy intervention

Review Legislation

Review of legislation on issues such as trading and opening hours, Easter licensing, the facilitation of events including licenses and road closures and the facilitation of 'on street' cafe culture.

National Park

Secure a designated location in Northern Ireland.

Accessibility

Develop an access strategy identifying critical routes and ensuring accessibility through transport, infrastructure and maximising use of land for leisure.

Planning

Develop flexible planning policies that encourage economic growth and responsible tourism development.

Sustained investment

Marketing

Sustained and integrated marketing programmes with partners in the close-to-home markets of Northern Ireland, Republic of Ireland and Great Britain.

Regeneration

Develop and improve key towns and cities and surrounding infrastructure to enhance the visitor experience.

Sweat the Assets

Tourism is everyone's business and everyone needs to play their part. Pool existing resource and investment across government to better deliver for tourism.

New investment

Events

Deliver increased funding to develop a year-round programme that extends the season, drives growth in the regions, and inspires people to consider Northern Ireland as a place to live, learn, work and visit.

Quality Visitor Experience

Improve the quality of customer service and communication and increase capability in the food and drink offering, skills base, and training provision for hospitality staff.

Major Capital Investment

There has been significant recent investment. We now need to complete the puzzle and:

- Secure a fully integrated conference and exhibition facility in Belfast
- Secure a National Arts Gallery to drive tourism intake and develop the cultural experience
- Facilitate the development of a new links Golf Resort

Engage with us

The Board of NITB is seeking to engage with key stakeholders across Northern Ireland in support of the tourism industry.

We want to unblock those issues that impede growth and competitiveness of our industry.

To discuss some of these areas further, please contact Howard Hastings or any of the NITB Board members on oneteam@nitb.com



Mr Howard Hastings
Chairman, NITB



Mr Donald Price



Mr Martyn Todd



Mr Kevin Baird



Mr Michael Deane



Mr Clive Gordon



Mr Thompson Keating



Dr Sally Montgomery



Mr Alistair McGowan

The team so far

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© Northern Ireland Tourist Board, 59 North Street, Belfast, BT1 1NB.
Telephone: +44 (0) 28 9023 1221 **Textphone:** +44 (0) 28 9044 1522
Fax: +44 (0) 28 9024 0960 **Email:** info@nitb.com

