Food & Drink Insights

TOURISM NORTHERN IRELAND

Introduction and Overview

This report provides our tourism partners with access to Food and Drink tourism insights, trends and opportunities. It provides an understanding of international tourism trends within the Food and Drink sector and an overview of current activity and emerging opportunities for food and drink experiences. An overview of our domestic and international visitors highlights what visitors are interested in and most likely to engage with from a product and experiences perspective.

A series of opportunities for our tourism industry to consider in the context of developing the Food and Drink product across the destination are outlined in the report. This includes optimising existing experiences and exploring opportunities to develop a new portfolio of Food and Drink experiences for visitors. A situational analysis has been undertaken to provide additional context for product development. This ensures that we maximise our strengths, address key challenges and explore the development opportunities that exist for Food and Drink tourism across Northern Ireland.

For a broader market context, please visit Tourism Northern Ireland's Consumer Sentiment Report section https://www.tourismni.com/research-insights/consumer-sentiment-analysis/ - which features an in depth analysis on consumer confidence, propensity to travel and consumer concerns.

SECTION 1

Understanding Trends

International Tourism Trends

- **Sustainability** remains a key global trend across the tourism industry with a growing demand for both sustainable travel and sustainable visitor experiences. **Transformative** and **regenerative** travel are also on the rise.
- Eco **responsible holidays** have become more of a priority for tourists and the places they visit. Tourists are increasingly aware of their carbon footprint, energy consumption and the use of renewable resources.
- **Digital travel** and **technology** integration within tourism is going to continue to accelerate across the tourism sector.
- **Health and wellness travel** is on the rise with more and more consumers seeking opportunities to recharge, relax, self-heal, self-develop, improve fitness, escape, self-reward, rejuvenate and pamper themselves.
- **Multi-generational travel** is currently booming and makes up between 33% and 40% of the total travel market. This is expected to continue to grow as tourism continues to recover.
- There is an increased demand for **personalised travel** (regardless of budget). Consumers are seeking unique and 'one-off' experiences that can't be replicated.
- There is an increased focus on **safety, security and health** for travellers, and they are likely to seek journeys in quieter destinations.
- **Active ecotourism** has begun to trend as consumers are becoming increasingly aware of their surroundings and are also seeking active/fitness focused experiences. This has become more common amongst the baby boomer generation who are also willing to spend more money on such experiences.
- **Luxury Travel** is a strong long-term trend that is expected to stay.
- **Secondary destinations** are trending, with modern travellers seeking to explore unfamiliar destinations and have a keen interest in supporting local or part-taking in local cultural experiences.
- **Escapism and nostalgia** are emerging trends amid global instability, with many travellers wanting the thrill of reliving the past days with nostalgic getaways.
- **Community tourism** is one of the fastest growing trends in travel - **Sustainable** and **Community-led experiences** that benefit both the area and its people, As well as generating income and empowering local communities, these kinds of experiences give travellers a deeper insight into traditional ways of life and a better understanding of a destination's diverse make-up. **Local Experiences –** Tourists want to engage with and participate in the local cultures from enjoying local cuisine to celebrating regional festivals and holidays.
- **Events & Festivals**: Iconic and niche events are returning in popularity as key motivations to explore new destinations.
- **"Localhood" –** Visitors are increasingly seeking authentic 'meet the local' type experiences.
- **Bleisure Travel –** The combination of business and leisure travel increased post-pandemic and is continuing to trend with many travellers combining their work trips with leisure trips. This has been made easier by the ability to work from anywhere.
- **Adventure and Outdoors –** More and more people are seeking trips that link soft adventure, the outdoors and recreational activities.

Report Sources: CBI, Skift, WTTC, Booking.com, Revfine, TNI, Mintel, The Travel Team, OECD, Forbes, Global Data PLC. For detailed source links please visit P20.

Four Key Food & Drink Trend Categories

1 Sustainability

Sustainability plays a central role in Food and Drink.

2 Authentic / Immersive

Authentic and Immersive Experiences are enhancing the Food and Drink scene.

3 Health & Wellness

Consumers are including a Health and Wellness focus their in Food and Drink experiences.

4 Accessing Local

Consumers want to access local Food and Drink experiences.

International Trends - Sustainability

- **Sustainability is Key**: A significant proportion of visitors are looking for ways through food tourism to contribute to their personal sustainable goals and eat at places demonstrating social responsibility. They look for places to eat that cook with locally sourced, seasonal ingredients and who proactively communicate and demonstrate their socially responsible methods.
- **Sustainability Initiatives**: Sustainability initiatives are trending in the food and drink sector with more and more initiatives like Zero Kilometre Food and ingredients being grown onsite.
- **Landscape/Seascape**: Food and Drink experiences linked to landscape/ seascape i.e. foraging walks are increasing in popularity.
- **Plant Based Menus**: More restaurants are including more plant based and sustainable food offerings on their menus.
- **Localhood**: A growing number of consumers have shown a desire to buy and consume more locally derived produce from within a smaller geography. In numerous cases this has been supported by the developed of online markets where consumers can order products and food boxes from small and artisan producers before collecting at an allocated day and time.
- **Hyperlocal Food**: There has been an increase in the number of consumers who are now more interested in sustainable food experiences and being aware of a business's green credentials. Consumers want their dining experiences to contribute to their personal sustainable goals and eat in places demonstrating sustainable food practices. Consumers are increasingly more concerned about food waste, food packaging and the handling of waste from food and beverage products.
- **Sustainable Workshops**: There has been an increase in sustainable workshops linked to Food and Drink on a global scale i.e. Sustainable food workshops teaching visitors how to creatively use food.

International Trends - Authentic / Immersive

- **Authentic Experiences**: Visitors are increasingly looking for the authentic local story behind the foods they are eating. Food tourism opportunities extend from markets, restaurants, cafes, food trucks to sit-down meals of local, authentic dishes prepared in-house.
- **Seeking Active over Passive Food Experiences**: More and more visitors want to immerse themselves in the delivery and co-creation of the food experience. Food tourism is increasing the breadth of options for visitors to engage from the basic tour to new signature food experiences telling the local food story.
- **Visitors are looking for exclusivity**: A growing number of visitors are seeking their own personalised experience to 'get behind the scenes' by meeting the local producers, brewers or greeting the chef.
- **Pairing Food with other interests**: A significant proportion of visitors are looking for active experiences within destinations providing tourists with the opportunity to combine their active pursuit interests with new ways of the telling the food story e.g. cycle or walking tours with food experience elements with local producers or local restaurants.
- **Multigenerational trips built around eating together**: A growing trend towards many generations travelling together e.g. extended family groups where the needs of different ages and interests of visitors must be taken into account.
- **People are spending more on food and beverage regardless of income**: An increasing range of food and drink product categories are 'passion' products and people are continuing to spend more money on quality food experiences.
- **Food Pairing**: There is a growing trend of presenting food experiences in different ways that include pairing Food and Drink with other interests i.e. Food Cycling Tours.
- **Cooking Classes**: Cooking lessons are growing in demand among millennials, families with kids, and solo travellers and viewed as an entertaining way to meet and interact with new people, both locals and travellers from other countries.

International Trends - Health & Wellness

- **Food/Culinary Travellers enjoy Active Tourism and spend more**: Visitors who show a higher level of interest in food have a tendency to take part in more destination experiences and spend more than other leisure tourism categories.
- **Wellness Food & Drink Experiences**: Internationally food and drink choices being influenced by health and wellness motivations while visitors are also seeking food and drink experiences linked to their own wellbeing i.e. Culinary yoga retreats, cooking combined with meditation classes.
- **Fitness & Outdoor Recreation**: There has been an increase in the number of experiences that combine Food and Drink with fitness and outdoor recreation i.e. Walking, cycling, and healthy food tours.
- **Super Foodies – Millennials and Gen Z**: Millennials interest in food continues to grow but Generation Z (born after 1996) are becoming known as the 'Super Foodies' displaying increased levels of knowledge and interest in food and drink.
- **Vegans, vegetarians and flexitarians**: Vegans, vegetarians and flexitarians are an ever-growing segment within food tourism.
- **Healthy or power food/diets**: Health and a healthy lifestyle are becoming increasingly important in tourists' decision making. Aging tourists, the lifestyle of Gen Y and Gen Z, a growing middle class, and the technological and digital revolution all contribute to the growing opportunity for healthy food experiences.
- **Special Diets**: There is an increased focus on combining local food products and experiences with global dietary trends and food preferences.

International Trends - Accessing Local

- **Hands-on meals and making the local connections**: An increasing number of visitors want the local food story and experience delivered by the local person introducing ingredients and regional techniques to the visitor. They want to eat intelligently through experiences such as time spent with chefs in the kitchen, around the dining table, with producers and growers on the farm or at the markets.
- **Pivot on Local Tastes and Styles**: Destinations are capitalising on particular tastes and foods associated with the destination to establish a unique food identity for the area, adopted and embraced across all food outlets in the region as a point of difference and platform for food innovation e.g. Cider in the Basque Country.
- **Urban Food & Drink Tours**: There has been a rise in urban Food and Drink Tours, where visitors discover the culture and history of urban areas as part of the food / drink experience.
- **Peer to Peer Dining**: Cooking with locals and eating at local homes is trending among a significant proportion of visitors.
- **Attraction Sightseeing**: Combining Food and Drink experiences with cultural tourism / attraction sightseeing is becoming more popular, particularly in urban areas.
- **Food and Drink Festivals**: Festivals and events specific to food and drink are increasing while hybrid festivals are also gaining popularity where visitors attend a cultural festival or event accompanied by a strong food and drink element.
- **Protecting and Sustaining Local Food Cultures**: More and more visitors want the destination backstory told through the history of the recipe, local food customs to the story of the local produce. Serving up a local and authentic meal is helping to protect and sustain local food culture.
- **Local Stories and Experiences**: There are more food and drink producers developing experiences that showcase local through experiences and stories.
- **Provide ways to buy local produce**: There is a growing number of visitors that want to bring home mementoes of their trip. New opportunities are fast emerging to create new revenue streams through recurring purchases e.g. Exclusive VIP food clubs, monthly food club, VIP whiskey sampling clubs.
- **Street Food and Markets**: Street food and visiting markets are synonymous with traveling and exploring local culture. Street food culture has undergone substantial transformation.

(Sources: Fáilte Ireland, CBI, SKIFT, Global Data, Mintel, The Travel Team, OECD, Forbes, Global Data PLC)

SECTION 2

Understanding the Visitor

Visitors Motivated by Food and Drink

Broadly Oriented Food Tourists:

- These tourists tend to search for many diverse and authentic food experiences but are rather price conscious. They are often adventure and cultural tourists as well and consist for a large part of Gen Y's and Gen Z's.
- Their interest lies in cooking with locals, visiting food markets, trying street food, and discovering the various restaurants of a destination — from historical to new, and from family-owned to large chains — so that they can get an authentic glimpse into the destination and its cuisine.

Culinary/Gastronomical Tourists:

- The culinary tourist is considered the more luxury-oriented and exclusive food tourist, who is willing to spend a lot on their food-loving activities. In general, these are people who are older than the broadly oriented food tourist and they have a higher level of education.
- These tourists are interested in doing other cultural activities alongside their food activities. They prefer having a highly curated and inside experience that comes close to a VIP experience. However, just like the other group of food tourists, they find the story and the authenticity of the experience very important.

Food and Drink Market Segments – Domestic Market Segments

Northern Ireland Domestic Holiday Makers Breakdown

Category	%	Estimated Annual Spend	Demographics
Aspiring Families	30%	£1,360	Most likely 35-44, even social class split, have younger children (under 16).
Social Instagrammers	15%	£1,006	Youngest segment with 29% aged 18-24yrs and 26% aged 25-34yrs. Least likely to have children.
Natural Quality Seekers	15%	£1,238	Older (av. age 55) more likely to be male, older kids.
Short Break Enthusiasts*	14%	£1,020	Even gender split, older (av. age 54), even social class split.
Pragmatists*	13%	£964	Female bias, older (av. age 45), older children, even social class split
Comfort Seekers	13%	£822	Older, more female, older kids 16+

* The segments showing most interest in food and drink include short break enthusiasts, who place a big emphasis on food during their trip, and pragmatists, who have a focus on enjoying good food.

Food and Drink Market Segments – ROI Segments

33% Active Maximisers:

- Youngest segment although significant number (57%) will have young children.
- Like to have planned and packed itinerary.
- Looking for a great destination and will plan around that.
- Looking for energetic experiences, unpredictability.
- Seeking night life, buzz but also romantic destinations.
- Active on social media and like to share holiday online.

20% Culture and Connections Seekers:

- Most likely segment to be interested in arts, culture and food.
- Motivated by the opportunity to spend time with family or friends on short breaks.
- Although older still motivated by energetic and outdoor activities.
- Older segment - more likely to be thinking about safety (personal and health) than other segments - need reassurance.

15% Open-minded Explorers:

- Interested in the natural environment, scenic attractions.
- Motivated by culture and are seeking unique experiences.
- Food very important and highly motivating for them.
- Want high quality accommodation.
- Older segment - concerned about their personal safety and health.
- Want good value for money.

13% Open-Minded Families

- Motivated by natural environment, scenic attractions.
- More likely to stay in a variety of different accommodation types.
- Motivated by history and culture and are seeking unique experiences.
- Looking for a variety of activities to suit all members of the family.
- Interested in gentle/relaxing outdoor activities.

11% Indulgent Relaxers:

- Most likely segment to take a 'romantic' break as their next break.
- Motivated by the opportunity to spend time with family or friends on short breaks.
- Prefer to stay in large comfortable hotels.
- Like to 'indulge' themselves when on a break.
- Enjoy good food and music.
- Interested in shopping opportunities while on a short break.

8% Good Time Families

- Interested in a variety of things - seeking to get the best from their breaks.
- Want to enjoy good food and drink.
- Like to interact with locals.
- More likely to take multi-generational breaks.
- Like to research their trips thoroughly and uncover hidden gems.
- Bigger spenders but focused on getting a good deal.

(Source: 'Taste the Island', Tourism Northern Ireland, Tourism NI Strategy Reporting Document)

International Market Segments

Culturally Curious:
Attitudes and Drivers –

- Want to broaden their minds, explore new culture, landscapes and history
- Want authentic, engaging experiences
- Want high-quality offerings at mealtimes

Food and Drink Experiences they like - Trends:

- Food festivals/events with local cuisines.
- Visit local producer, processor, distiller and brewer,.
- Local food markets.
- ‘Catch and cook’ and ‘make your own’ activities.
- Guided trails and tours.
- Long-table dining.
- Experiences that blend food with culture / arts /adventure/ wellness.

Great Escapers:
Attitudes and Drivers –

- Want unique experiences outside the main tourist thoroughfares
- Want rural holidays and food that is good-value, of a wide range (to suit them and young families), and relevant to local activities

Food and Drink Experiences they like - Trends:

- Self-guided food and foraging walks/trails that are linked to landscape/seascape.
- Farm visits.
- Specialist food shops, bakeries and markets.
- Non-intrusive, high-quality food offerings.
- Picnic baskets.
- Food trucks.
- Long-table dining.

Social Energisers:
Attitudes and Drivers –

- Want fun, exciting, novel experiences
- Like sharing on social media

Food and Drink Experiences they like - Trends:

- Urban food tours.
- Affordable gastronomic experiences.
- Shared experience dining.
- Food trucks and stands.
- Non-traditional dining, pop-ups.
- Socially responsible food concepts.
- Indoor food halls.
- Multi-concept.
- Food and drink pairing events.

(Source: ‘Taste the Island’, Tourism Northern Ireland)

International Markets – Food and Drink Behaviour

French Market:

- **39%** of French tourists plan their travel around where and what they eat and drink.
- Culinary activities are far more important for French tourists compared to German and Great Britain tourists.
- French tourists prefer to travel to countries where they can speak their own language, and that serve dishes that are from the French cuisine.
- When French tourists see ingredients or recipes they are familiar with, they tend to be more open to the food experience.

German Market:

- **34%** of Germans plan their travel around where and what they eat and drink.
- Food is a less important driver for Germans compared to the French and British market.
- The German market spend roughly **16%** of their travel expenditure on food.
- **63%** pay attention to the impact of food choices on the environment.
- **22%** are prepared to spend more money for sustainable food, and 33% are willing to spend more money on food for which farmers get a fair price in return.

Great Britain Market:

- Out of the three largest source countries, Germany, Great Britain and France, the Great Britain market consider food to be the most important when planning their travel, as **40%** of them plan their travel around where and what they eat and drink.
- The main food interests of the Great Britain market are sampling local cuisine and exploring neighbourhoods.
- The Great Britain market spend **16%** of their travel expenditure on food.

Spanish Market:

- The Spanish market look at the consumption of food and drink as a socialising moment and they often eat with their whole family.
- **70%** pay attention to the impact of food choices on the environment.
- The Spanish have a high preference for Spanish-speaking guides and have a higher preference for buying with a tour operator.
- **23%** of the Spanish market are prepared to pay more for sustainable food.

	Great Britain	United States	Germany	France
Opportunity	**2019:** 4.8M tourists 1.7M holidaymakers. 1.5M tourists included NI	**2019:** 1.7M tourists 1.3M holidaymakers. 212,000 tourists included NI	**2019:** 749,000 tourists 509,000 holidaymakers. 65,000 tourists included NI	**2019:** 557,000 tourists 347,000 holidaymakers 55,000 tourists included NI
Revenue	**Tourist:** €1.4bn/£1.3bn **Average:** €302/£263 per Tourist **Average spend while in NI:** £305	**Tourist:** €1.6bn/£1.4bn **Average:** €916/£797 per Tourist **Average spend while in NI:** £166	**Tourist:** €459M/£399M **Average:** €613/£533 per Tourist	**Tourist:** €283m/£246m **Average:** €508/£442 per Tourist **Average spend while in NI:** £161
Length of Stay	**Tourists:** 4.7 nights **Holidaymakers:** 4.3 nights **NI:** Average of 3.2 nights	**Tourists:** 8 nights **Holidaymakers:** 7 nights **NI:** Average of 2.4 nights	**Tourists:** 8.6 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.5 nights	**Tourists:** 9.9 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.1 nights
Reason for visiting	36% Holiday, 46% VFR, 17% business, 1% other	73% Holiday, 17% VFR, 6% business, 4% other	68% Holiday 16% VFR 11% business 5% other	62% Holiday 18% VFR 12% business 8% other
Activities	The British are active holidaymakers: **70%** sites of historical interest, **70%** engaged in pastimes/events, **33%** participated in activities.	American Holidaymakers are active tourists: **96%** sites of historical interest, **90%** engaged in pastimes/events **44%** participated in activities.	Germans are active tourists and hiking/cross-country walking is their most popular activity **92%** sites of historical interest, **83%** engaged in pastimes/events **58%** participated in activities.	French are active tourists and enjoy exploring historical sites and engaging in multiple events and activities while on the island of Ireland. **89%** sites of historical interest, **93%** engaged in pastimes/events **52%** participated in activities.
Travel Trends	31% visit July – September 20% Jan – Mar 27% Apr – Jun 21% Oct – Dec 23% visit NI	543,000 Rent a Car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 17% Oct- Dec 10% visit NI	169,000 rent a car 42,000 bring a car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 16% Oct- Dec	66% rent a car 30% bring car on ferry 34% visit July – September 18% Jan – Mar 30% Apr – Jun 17% Oct- Dec
Planning	WoM is the most powerful influence 71% of GB holidaymakers planned their trip via the internet 12% using guidebooks	48% were inspired to visit by word of mouth 74% of American holidaymakers planned their trip via the internet 25% using guidebooks	Almost 50% were inspired to visit by word of mouth 70% of German holidaymakers planned their trip via the internet 35% using guidebooks	53% were inspired to visit by word of mouth 66% of French holidaymakers planned their trip via the internet 41% using guidebooks
Demographic Profile	39% yrs 25-44yrs, 18% under 24yrs, 43% over 45yrs, 79% ABC1	39% 55yrs+ 20% 35 - 54yrs 42% couples 92% ABC1	50%+ under 35yrs 33% under 25yrs 43% couples 90% ABC1	50%+ under 35yrs 36% couples 92% ABC1
Accommodation	Paid Accommodation - predominantly hotels. 50% spent with Family & Friends	Paid Accommodation - predominantly hotels.	Hotels, B&B's, Guesthouses	Rented Accommodation Hotels Guesthouses/B&B's
Core Segments	19% Culturally Curious (4.4M) 23% Social Energisers (2.7M)	32% Culturally Curious (11.5M) 22% Social Energisers (12.9M)	49% Culturally Curious(9.1M) 10% Social Energisers (2.4M) 24% Great Escapers(7.9M)	51% Culturally Curious(6.2M) 14% Social Energisers (1.9M) Great Escapers (2.5M)

TOURISM NORTHERN IRELAND

SECTION 3

Opportunities to Consider

Demand for Food & Drink Experiences is Growing

Interest in Food and Drink continues to grow across all markets

Culinary tourists are more likely to engage more with what the destination have to offer and not just focus on gastronomic experiences i.e. heritage, culture , activities

Food and drink tourists are looking at more engaging experiences that involve 'meeting the maker' and the personalities behind the local story.

"Local and Authentic" are necessary and underpin all great experiences

Millennials and Generation Z are the 'Super Foodies' always looking for immersive local experiences and sampling food in interesting venues / locations.

Younger visitors are more experimental and adventurous when it comes to food and drink experiences

Drinks tourism is a growth segment i.e. distillery, brewing experiences

Visitors are looking for variety in Food & Drink Experiences compared to what is available to them at home.

Food Tourism decision making is flexible when it comes to considering where to visit opening up new opportunities for rural and coastal locations.

Visitors expect commitment to sustainable food and drink practices

Good Food and Drink experiences are important factors in contributing to increased levels of visitor satisfaction for a destination.

Opportunities to Consider

- **Local Menus / Low Food Miles**: Create menus of local food delivered with a commitment to sourcing food within 20 miles e.g. Zero-kilometre food initiatives.
- **Protecting & Sustaining Local Food Culture**: Increase the number of food and drink providers across Northern Ireland who serve up local and authentic meals to help protect and sustain local food culture e.g. Local food trucks and stalls.
- **Hyperlocal Food**: Develop food and drink experiences that demonstrate sustainable practices and contribute to visitors personal sustainable goals e.g. Reducing waste initiatives.
- **Pairing Food with Other Interests**: Develop food and drink experiences through new ways of telling the food stories e.g. Cycle or walking tours with food and drink experience elements.
- **Niche 'Learn to' Experiences**: Develop a programme of niche 'learn to' and immersive experiences that are currently limited in supply e.g. Foraging, cooking.
- **Coastal & Activity Food Route Experience**: Develop more coastal food and activity experiences combining coastal activities e.g. coastal foraging, kayaking, canoeing.
- **Food and Drink Trails / Routes**: Develop a series of food and drink trails to link destinations e.g. Rural Farm Trails, Coastal Food Trails.
- **Unique Food Experiences**: Examine opportunities to deliver unique experiences in exclusive settings or premium venues e.g. Canoe Trail with food experience delivered in cultural venue at the end.
- **Artisan Producers Experiences**: The development of more experiences that introduce the visitor artisan producers e.g. Visiting local bakers and chefs.
- **Food History Experiences**: Deliver a combination of food heritage, history and tastings set in a historic venue linked to food e.g. Cultural food taste and tour.
- **Themed Food Weeks**: Host a destination wide themed week with a new food / drink theme each year e.g. Seafood and wine festival.
- **Wellness Product**: Increase the number of food and drink products that incorporate a wellness related experience e.g. Culinary yoga retreats.
- **Local Experiences**: Develop food and drink experiences that incorporate the local story and the people behind the foods visitors are eating e.g. Dining with locals.
- **Exclusivity**: Enhance the provision of food and drink related experiences that offer visitors a personalised experience e.g. Neighbourhood food, local market experiences, meet the makers etc.
- **Evening Economy**: Development of more evening time experiences related to food and drink e.g. Evening urban walking food tours.
- **Connecting Food Itineraries**: Incorporation of a number of collaborative experiences between food and drink producers delivering blended experiences.
- **Packaging Experiences with Accommodation Providers**: Create new approaches to package food and drink experiences with accommodation providers.

Find more local and global Research and Insights at Tourism 360° - https://www.tourismni.com/research-insights/tourism-360/

Report Sources

CBI - https://www.cbi.eu/market-information/tourism/food-tourism/market-potential

SKIFT - https://skift.com/megatrends-2023/

WTTC - https://wttc.org/

Booking.com - https://www.booking.com/

Revfine - https://www.revfine.com/hospitality-trends/

TNI - https://www.tourismni.com/research-insights/

Mintel - https://matlust.eu/wp-content/uploads/2020/06/Mintel_2030_Global_Food_and_Drink_Trends_final.pdf

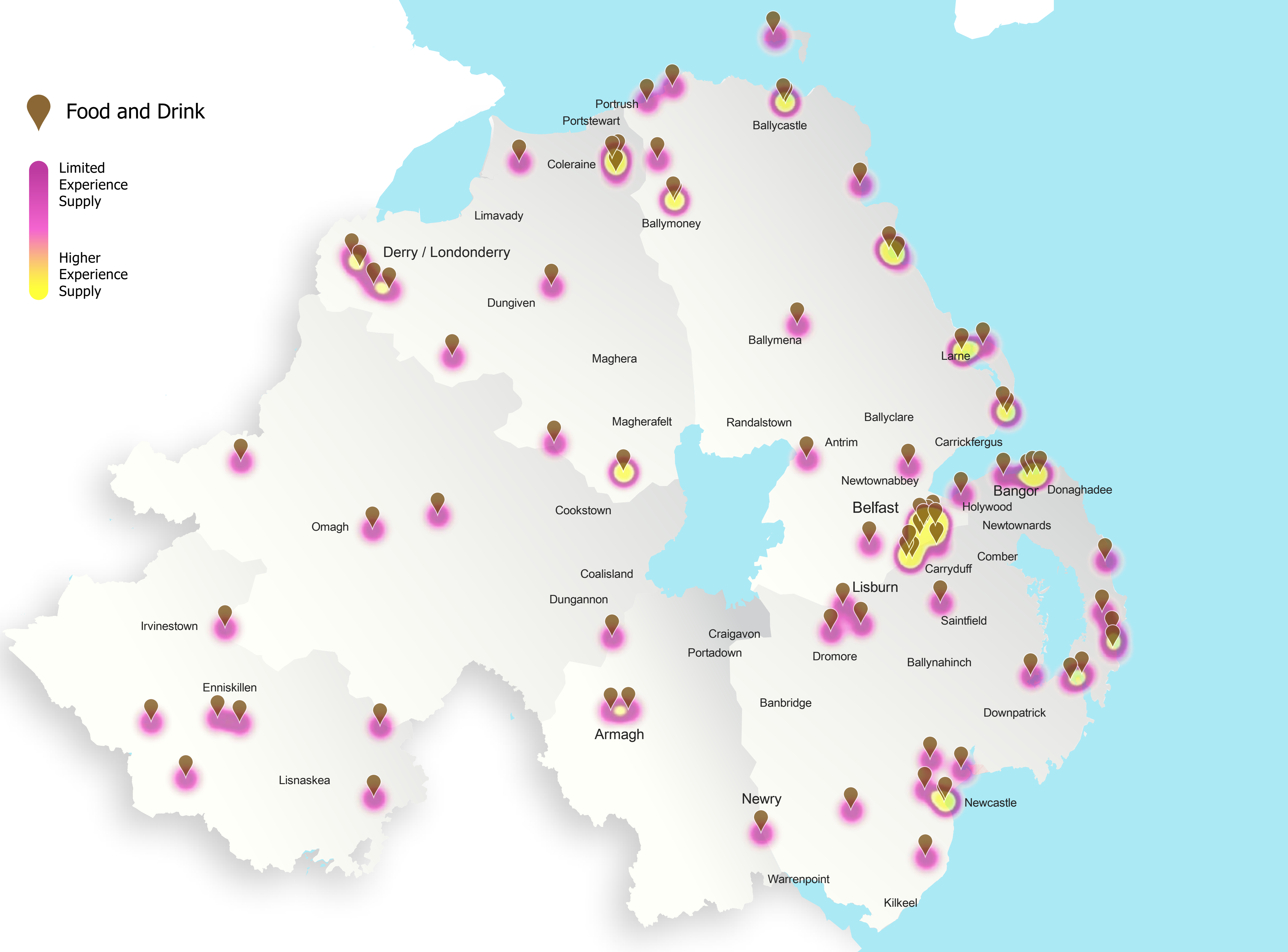
OECD - https://www.oecd.org/futures/35391719.pdf

Global Data PLC - https://www.globaldata.com/

Repucon Consulting - https://www.repucon.ie

Situational Analysis - Food & Drink

TOURISM NORTHERN IRELAND

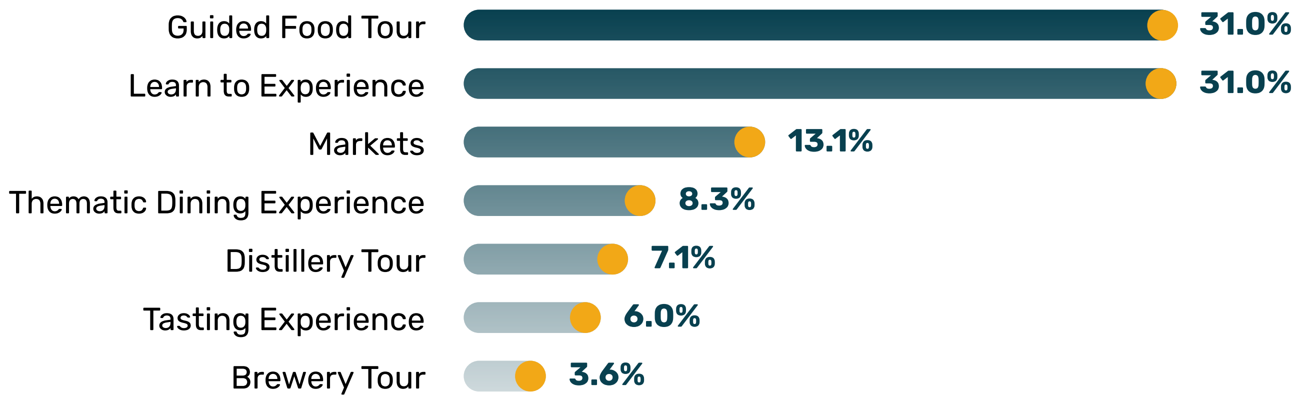

Food and Drink
Limited Experience Supply
Higher Experience Supply
Portrush
Portstewart
Ballycastle
Coleraine
Limavady
Ballymoney
Derry / Londonderry
Dungiven
Ballymena
Maghera
Larne
Magherafelt
Randalstown
Ballyclare
Antrim
Carrickfergus
Newtownabbey
Bangor
Donaghadee
Belfast
Holywood
Newtownards
Cookstown
Omagh
Comber
Carryduff
Coalisland
Lisburn
Dungannon
Saintfield
Irvinestown
Craigavon
Portadown
Dromore
Ballynahinch
Enniskillen
Banbridge
Downpatrick
Armagh
Lisnaskea
Newry
Newcastle
Warrenpoint
Kilkeel

Food & Drink Cluster Map Summary

County	Percentage of overall Food and Drink Products in NI	Number of Food and Drink Experiences	Strongest Product Category
Antrim	37%	31	'Learn to' Experiences
Down	27%	23	'Learn to' Experiences
Derry/ Londonderry	14%	12	Guided Food Tours
Armagh	9%	8	Guided Food Tours
Tyrone	7%	6	'Learn to' Experiences
Fermanagh	5%	4	'Learn to' Experiences
Total	100%	84	Guided Food Tours and 'Learn to' Experiences

Antrim dominates the Food and Drink scene in Northern Ireland, accounting for more than a third of the overall offerings. Of the Antrim Food and Drink Experiences, 55% (17/31) are in Belfast. County Down then follows, representing 27% of the overall offerings. Derry/Londonderry represents 14%, whilst the counties of Armagh, Fermanagh and Tyrone represent the smallest segments of Food and Drink Tourism in Northern Ireland.

Food & Drink Cluster Map Summary



Antrim

Total Experiences = 31

Learn to Experience	32.3%
Guided Food Tour	25.8%
Markets	19.4%
Brewery Tour	6.5%
Thematic Dining Experience	6.5%
Tasting Experience	6.5%
Distillery Tour	3.2%

Armagh

Total Experiences = 8

Guided Food Tour	75.0%
Learn to Experience	12.5%
Markets	12.5%

Derry/Londonderry
Total Experiences = 12

Guided Food Tour	50.0%
Learn to Experience	33.3%
Markets	16.7%

Down
Total Experiences = 23

Learn to Experience	30.4%
Guided Food Tour	21.7%
Thematic Dining Experience	13.0%
Distillery Tour	13.0%
Markets	8.7%
Tasting Experience	8.7%
Brewery Tour	4.3%

Fermanagh
Total Experiences = 4

Learn to Experience	25.0%
Thematic Dining Experience	25.0%
Tasting Experience	25.0%
Distillery Tour	25.0%

Tyrone
Total Experiences = 6

Learn to Experience	33.3%
Guided Food Tour	33.3%
Thematic Dining Experience	16.7%
Distillery Tour	16.7%

SECTION 4

Building on our **Strengths**

- **Immersive Experiences**: Quality and range of immersive Food and Drink experiences linked to other experience categories e.g. heritage, culture, activity.
- **Iconic Brands**: Existence of iconic Northern Ireland Food and Drink brands and platform for national product trails e.g. Bushmills Whiskey.
- **Multigenerational Experiences**: Mix of Food and Drink experiences that cater for new trends in travel e.g. multigenerational group travel.
- **Fusion of Food and Activity**: Existing immersive Food and Drink experiences combined with both on land and on water activities e.g. Canoe and Cake, Mourne Trails and Ales Tour.
- **Urban Food & Drink**: Strength of urban food experiences with particular strong product base in Belfast.
- **'Learn to' Experiences**: Well-established 'learn to' experiences across the destination e.g. Cookery Schools and Artisan Gin Schools.
- **Sustainability Merged Innovation**: Range of Food and Drink experiences that proactively demonstrate their commitment to seasonal ingredients and local produce.
- **'Shop Like a Local'**: St. George's as an iconic market and opportunity to 'shop like a local'.
- **Food Tours**: Range of innovative food tours appealing to Gen Z and Millennial markets.
- **Food Trails**: Existence of local food trails.
- **Agri-Food**: Access to top-class agri-food offerings from farmhouse experiences to meet the makers and food producer experiences.
- **Coastal Food Experiences**: Association of high-quality dining and seafood experiences with the Causeway Coastal Route
- **Whiskey and Gin offering**: Depth of whiskey and gin distillery offerings with a good range of distillery visitor experiences available e.g. Bushmills Distillery & Hinch Distillery.
- **National Whiskey Trail**: Commencement of the Northern Ireland Whiskey Trail building on the opportunity around Northern Ireland's whiskey provenance and the ability to link regional destinations and act as a focal point for experience development.
- **Breweries**: Variety and diversity of brewery experiences available across Northern Ireland.
- **Food Personalities**: Existence of strong food personalities driving the destinations profile as a great place to eat.

SECTION 5

Addressing our **Weaknesses**

- **Lack of Awareness of Northern Ireland as Food and Drink Destination**: Visitors have low levels of awareness of Northern Ireland as a food and drink destination.
- **Access to Food Experiences**: Limited spread of Food and Drink experiences across each of the counties with a high concentration in urban areas.
- **Meet the Maker / Artisan Experiences**: There is limited access to agri-food and drink experiences across Northern Ireland.
- **Evening / Night Time Experiences**: Limited supply of food and drink evening time experiences, including urban areas with few experiences operating beyond 6PM.
- **County Destination Food Experiences**: Counties with low numbers of experiences are not maximising their food provenance e.g. Armagh / Orchard County, Fermanagh and its Lakelands.
- **Festivals and Events**: Outside of a small number of key food events, the opportunity to extend the season through niche / smaller events is limited.
- **Integrating Food & Wellness**: Limited integration of food and wellness into experience delivery.
- **Limited Experiences – Armagh, Fermanagh & Tyrone**: Low number of food and drink experiences in these counties when compared in particular to Antrim and Down.
- **Local Food and Drink Trails**: Food and Drink trails and routes are not developed at a local scale to develop experience clusters.
- **Coastal Food and Drink Experiences**: Scale of coastal food and drink experiences along the Causeway Coastal Route (outside of Belfast and Derry/Londonderry) is limited.
- **Authentic Experiences**: Limited range of authentic experiences available that incorporate the local story e.g. artisan producers experiences, meet the makers, neighbourhood food.
- **Flagship Food Experiences**: There is limited supply of flagship food experiences linked to the epic experience theme.
- **Food and Drink Packages**: Collaboration levels are low in developing blended food and drink packages and itineraries.
- **Digital Presence**: Digital presence and online capabilities appear low in creating industry wide awareness of available food and drink experiences.

SECTION 6

Opportunities to Consider

- **Food and Drink Trails / Routes:** Develop a series of food and drink trails to link destinations e.g. Rural Farm Trails, Coastal Food Trails.
- **Unique Food Experiences:** Examine opportunities to deliver unique experiences in exclusive settings or premium venues e.g. Canoe Trail with food experience delivered in cultural venue at the end.
- **Protecting & Sustaining Local Food Culture:** Increase the number of food and drink providers across Northern Ireland who serve up local and authentic meals to help protect and sustain local food culture e.g. Local food trucks and stalls.
- **Artisan Producers Experiences:** The development of more experiences that introduce the visitor to artisan producers e.g. Visiting local bakers and chefs.
- **Niche 'Learn to' Experiences:** Develop a programme of niche 'learn to' and immersive experiences that are currently limited in supply e.g. Foraging, cooking.
- **Coastal & Activity Food Route Experience:** Develop more coastal food and activity experiences combining coastal activities e.g. coastal foraging kayaking, canoeing.
- **Food History Experiences:** Deliver a combination of food heritage, history and tastings set in a historic venue linked to food e.g. Cultural food taste and tour.
- **Themed Food Weeks:** Host a destination wide themed week with a new food / drink theme each year e.g. Seafood and wine festival.
- **Wellness Product:** Increase the number of food and drink products that incorporate a wellness related experience e.g. Culinary yoga retreats.
- **Local Experiences:** Develop food and drink experiences that incorporate the local story and the people behind the foods visitors are eating e.g. Dining with locals.
- **Local Menus / Low Food Miles:** Create menus of local food delivered with a commitment to sourcing food within 20 miles e.g. Zero-kilometre food initiatives.
- **Hyperlocal Food:** Develop food and drink experiences that demonstrate sustainable practices and contribute to visitors personal sustainable goals e.g. Reducing waste initiatives.
- **Pairing Food with Other Interests:** Develop food and drink experiences through new ways of telling the food stories e.g. Cycle or walking tours with food and drink experience elements.
- **Exclusivity:** Enhance the provision of food and drink related experiences that offer visitors a personalised experience e.g. Neighbourhood food, local market experiences, meet the makers etc.
- **Evening Economy:** Development of more evening time experiences related to food and drink e.g. Evening urban walking food tours.
- **Connecting Food Itineraries:** Incorporation of a number of collaborative experiences between food and drink producers delivering blended experiences.
- **Packaging Experiences with Accommodation Providers:** Create new approaches to package food and drink experiences with accommodation providers.

SECTION 7

Recognising the **Challenges**

- **Developing Rural Experiences**: Develop the volume of saleable rural food and drink experiences and increased use of designated food trails and routes to orientate visitors using food as a theme.
- **Developing Coastal Food and Drink Routes**: Develop motivational food routes that disrupt visitor flows from the established coastal touring route pattern.
- **Consistency in Operations**: Providing consistent operations approach using digital such as the ability for visitors to find and book food and drink experiences online.
- **Food Sector Engagement**: Educating food and drink producers to consider the tourism opportunity for their business.
- **Consumer Demands**: Post Covid legacy impact on food and drink businesses and their capacity to adopt to new consumer demands and expectations.
- **Industry Investment Confidence**: Confidence among the food and drink industry to invest in new experiences impacted by prevailing macro economic conditions.
- **Linking Destinations**: Ability to thematically link destinations across Northern Ireland due to low levels of food and drink experiences in rural areas.
- **Linking Experiences**: Lack of integration and linking food experiences contributing to a visitor perception of the destination being fragmented and difficult to access.
- **Ability to operate**: Impact of global shocks on the tourism industry to sustain operations, attract staff and be financially sustainable, particularly outside of large urban centres.
- **Exchange Rate**: Exchange rate impact on key markets.
- **Brexit**: Continued uncertainty surrounding Brexit.
- **Operational Costs**: Challenge of operational costs impacting on capacity to focus on new food and drink experience development.
- **Developing new Food and Drink Experiences**: Rising insurance costs limiting how businesses can develop new experiences.
- **Cross Promotion**: Requirement for greater networking and industry collaboration to cross promote and package visitor experiences.

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