



Department for the
Economy
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**RESEARCH ON THE FUTURE
OF TOURISM IN NORTHERN
IRELAND**

Final report

19 May 2023

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1. Executive Summary

Content and objectives of the paper

This research paper has been commissioned to present the added value of tourism in the context of NI's economic vision, to identify key challenges by 2030 and identify international best practice that could inform the Government policy.

Our conclusion is clear: tourism is aligned with the 10X Vision and has been delivering tangible results for several years. Moving forward, substantial measures could be taken to ensure the sustainable development of this value-added sector. Investing in the tourism product is key to ensuring its long-term competitiveness. This could be done in accordance with co-constructed objectives and regularly monitored KPIs considering the economic, social and environmental impacts generated by tourism.

Today, both local and global tourism is at a crossroad.

It has delivered and is still delivering huge benefits to national economies and local communities over many years by providing jobs for all, enriching local quality of life and promoting Northern Ireland's image throughout the world.

However, by 2030, the Department for the Economy, Tourism Northern Ireland, Tourism Ireland, and the other tourism stakeholders will have to answer three main questions:

1. How can we increase the resilience of the tourism sector against climate change and air travel dependency for an island destination?
2. How can we innovate to fulfil new demands from domestic and international tourists post-COVID?
3. How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?

The objectives of this research paper are as follows:

- Demonstrate how the NI tourism industry is successfully contributing to the fulfilment of the principles of the 10X Economic Vision
- Highlight the various challenges facing the NI tourism industry from an economic, environmental and social perspective
- Showcase best-practice examples from comparator countries including their actions taken to respond to economic, environmental and social challenges, to be considered by the NI tourism industry where appropriate and viable
- Present recommendations which could support the NI tourism industry respond to the economic, environmental and social challenges, and continue to serve as an attractive and competitive tourist destination

This research paper is not intended to give definitive answers to these three main questions, as the cost and the benefits of each of these recommendations will need to be assessed carefully. The opinion of NI stakeholders (public and private) will also need to be taken into account when making strategic, operational or regulatory recommendations. It is evident, however, that the recommendations provided will prove useful in fulfilment of and are aligned to relevant upcoming Visions and Strategies (in addition to 10X) such as the currently-proposed pillars of the upcoming NI Tourism Strategy. Linkages between recommendations and this proposed Strategy can be seen in Appendix #1.

In this research paper, 12 recommendations are made based on international evidence and could be investigated further:

Recommendations to improve the environmental resilience of NI as a tourism destination:

1. Define and measure tourism value added
2. Plan for rising carbon prices in airplane tickets and investment into public transport for use by tourists visiting Northern Ireland
3. Undertake studies to understand and adapt to the tangible consequences of climate change for hospitality and leisure businesses

Recommendations to maximise the economic impact of tourism in NI:

4. Continue measuring the economic impact of tourism in NI
5. Put digital and experiences at the core of its tourism offer to stay competitive at an international level
6. Leverage the power of business tourism and large-scale business events to position NI as a world-class tech destination

Recommendations to maximise the social impact of tourism in NI:

7. Monitor the social impact of tourism on local populations on an ongoing basis
8. Strengthen the attractiveness of tourism jobs and retain employees in the sector
9. Rethink training programs to be aligned with the needs of companies and destinations
10. Monitor and redirect tourism flows
11. Monitor housing prices around tourism destinations
12. Pilot regulations for short stays rents and digital platforms in specific locations

It is clear that these recommendations directly link to the 10 principles of the 10X Economic Vision. A table linking the recommendations to principles can be found on the following page and these linkages are also further referenced in the document.

Research paper on the future of tourism in Northern Ireland

10X Principles										
Recommendation	1. Address those issues that really matter and will make a lasting and positive difference in peoples' lives ¹	2. Deliver positive economic, environmental, and societal outcomes	3. Support a greener, sustainable economy	4. Provide a fairer distribution of opportunities for all our people	5. Inspire the future generations to thrive	6. Position NI amongst the most competitive small advanced economies in the world	7. Focus on increasing innovation in high value-added areas and priority clusters resulting in higher wages	8. Deliver improved outcomes for all including better jobs with better wages for all our people, with a more flexible work environment and a better overall quality of life	9. Position NI as an optimum place to work, invest, live and visit	10. Shaped by public sector innovation and co-design with partnership working at its heart
1. Define and measure tourism value added		✓	✓	✓	✓			✓	✓	
2. Plan for rising carbon prices in airplane tickets adapting local transport and investment into public transport for use by tourists visiting Northern Ireland		✓	✓		✓					
3. Undertake studies to understand and adapt to the tangible consequences of climate change for hospitality and leisure businesses		✓	✓	✓					✓	
4. Continue measuring the economic impact of tourism in NI		✓	✓	✓	✓			✓		
5. Put digital and experiences at the core of its tourism offer to stay competitive at an international level		✓				✓	✓	✓	✓	✓
6. Leverage the power of business tourism and large-scale business events to position NI as a globally-		✓				✓	✓	✓	✓	✓

¹ It should be acknowledged that the first principle is broad-ranging and encompasses the following nine principles. Therefore, specific contributions to each principle were detailed in the following columns.

recognised world-class tech destination										
7. Monitor the social impact of tourism on local populations on an ongoing basis	✓	✓	✓	✓				✓	✓	✓
8. Strengthen the attractiveness of tourism jobs and retain employees in the sector	✓		✓	✓	✓			✓	✓	✓
9. Rethink training programmes to be aligned with the needs of companies and destinations	✓		✓		✓	✓		✓	✓	✓
10. Monitor and redirect tourism flows	✓	✓	✓		✓	✓		✓	✓	✓
11. Monitor housing prices around tourism destinations	✓							✓	✓	✓
12. Pilot regulations for short stays rents and digital platforms in specific locations	✓		✓					✓	✓	✓

Methodology

A range of comparator small island-, small advanced economy-, and additional exemplary countries were chosen to demonstrate a panel of solutions in overcoming the challenges facing the tourism industry globally and unlocking transformation in a post-COVID world. The range of challenges raised by tourism activities in NI - environmental, social and economic challenges - make it necessary to consider a separate comparative methodology by issue. To address this, a comparative framework for each type of challenge was created.

a) Benchmark countries

The environmental item focuses on examples of countries which implemented solutions to increase the resilience of the tourism sector against climate change and airplane dependency. Two metrics were considered to identify the comparators: firstly, being an insular/island destination and having a high rate of airplane dependency. A benchmark was therefore undertaken for the following insular destinations:

Environmental criteria

Island destinations	Airplane dependency (% of external tourists arriving to the destination by airplane)	Co2 equivalent generated by international passenger flights ² (tonnes) - 2022	Population ³ (million) - 2020
NI	85% in 2019 ⁴	34,592,000 (entire UK)	1.9 ⁵
Maldives	99% in 2023 ⁶	759,411	0.5
Mauritius	97% in 2019 ⁷	798,708	1.3
Republic of Fiji	92% in 2019 ⁸	469,132	0.9
Hawaii	99% ⁹ in 2019	6,300,000 ¹⁰	1.5
Balearic Islands*	-	-	1.2

*due to being a set of islands within a wider country, it was not possible to attain isolated data relating to airplane dependency or CO2 equivalent generated by international flights for the Balearic Islands. However, due to a similarity in collective population to Northern Ireland, the Balearic Islands remain a legitimate comparator.

To address the economic and social challenges raised by tourism activities, European tourism destinations were considered, particularly those with a large number of tourists per year, similar GDP and a tourism sector that contributes to a more or less similar share of GDP than that of the UK/NI. Each of these countries face similar issues relating to the acceptance of over-tourism by locals. The study relating to tourism regulation focused on six European countries to which this aspect was pertinent: France, Germany, Italy, UK, Spain, and the Netherlands.

2 OECD Statistics – Air Transport CO2 Emissions

3 Oxford Economics. (2023, March 23). Oxford Economics, <https://www.oxfordeconomics.com/>

4 EY, tourism market outlook in Northern Ireland, March 2022

5 2020 mid-year Population Estimates for Northern Ireland, NISRA, 2020, Statistical Bulletin - 2019 Mid-year Population Estimates for Northern Ireland ([nisra.gov.uk](https://www.nisra.gov.uk))

6 12 000 cruise visitors are expected in 2023, which represent 1% of the 1,4millions annual visitors in the Maldives. 2023, January 8). Nine cruise liners scheduled to arrive this year. Maldives News Network.

7 Handbook of statistical data on tourism 2019. (Table 6, page 9/35.). Ministry of Tourism - Mauritius.

8 Earnings from Tourism - Fiji Bureau of Statistics, page 3/6. (s. d.).

9 Only 1% tourists travelled by cruise in 2019. Hawaii tourism

10 Air Travel's Carbon Footprint Takes A Big Environmental Toll In Hawaii - Honolulu Civil Beat

Economic and social criteria

European countries	GDP per capita ¹¹ (\$) - 2019	Tourism GDP (direct) as % of total GDP ¹² - 2019	Number of external tourists per year (million) - 2019 ¹³	Highest level of restriction on short-term rentals, per area of regulation
NI	26,394 ¹⁴ (£)	2.3 of GVA - 2018 ¹⁵	3.0 ¹⁶	Local scale (rent pressure zone)
France	38,942	7.5 ¹⁷	217.88	National scale that can be strengthened at local scale
Germany	43,351	3.48 ¹⁸	39.56	Regional and local scale
Italy	32,125	10.6	95.4	At local scale
UK	47,520	10.9 ¹⁹	40.86	At regional and local scale
Spain	28,060	12.4 ²⁰	126.17	Strongest restrictions are at regional and local scale
Netherlands	48,387	9.8	20.13	National and local scale

Ireland was not considered in the benchmark as we focused on other European tourism destinations with similar indicators to diversify the solutions implemented elsewhere. European tourism destinations were considered, particularly those with a large number of tourists per year, similar GDP and a tourism sector that contributes to a more or less similar share of GDP than that of the UK/NI

b) The 10X exemplary countries

As part of the research, the countries referenced within the 10X Economic Vision document were also included when considering comparator countries. These countries were then assessed based on their appropriateness for inclusion in the benchmarking exercise. The table below highlights these countries, illustrating whether they were utilised for the research and subsequent details on the comparison where chosen. The most relevant countries for introducing resilient tourism practices were chosen.

Referenced country	Included in research (Yes/No)	Comment on the practices
Denmark	No	-
Estonia	Yes	Leading practices in offering sustainable tours of the country, requiring little transport
Finland	No	-
France	Yes	Exemplary advice provided on mitigating the effects of the tourism sector's labour shortages
Hong Kong	No	-

¹¹ Oxford Economics. (2023, May 23). Oxford Economics, <https://www.oxfordeconomics.com/>

¹² Statista. (s. d.). Statista - The Statistics Portal. <https://www.statista.com/>

¹³ Worlddata : The world in numbers. Worlddata.info. <https://www.worlddata.info/>

¹⁴ Regional gross domestic product: all ITL regions - Office for National Statistics

¹⁵ Tourism-Statistics-Annual-Publication-2019_0.pdf (nisra.gov.uk)

¹⁶ Tourism Performance Statistics. Tourism NI - The Hub.

¹⁷ OECD receipt and expenditure in international tourism per county. (s. d.). OECD.

¹⁸ Germany Travel and tourism direct contribution to GDP (% of GDP), 1995-2019 - knoema.com

¹⁹ United Kingdom Contribution of travel and tourism to GDP (% of GDP), 1995-2019 - knoema.com. (2019, June 4th). Knoema. <https://knoema.com>.

²⁰ OECD receipt and expenditure in international tourism per county. (s. d.). OECD.

Israel	No	-
Netherlands	Yes	Exemplary practices which strive ensure that tourism benefits all of its citizens and minimise environmental damage
New Zealand	Yes	Leading practices in ensuring businesses are signed up and on track to net-zero by 2025 targets
Singapore	Yes	Leading practices in job digitisation, leading to higher value jobs for citizens
Switzerland	No	-
Taiwan	No	-

2. The Northern Ireland Tourism Industry

The Northern Ireland Tourism industry is a key contributor to the Northern Irish economy, boasting an annual tourism expenditure of more than £1 billion²¹ (2019). In 2019 the industry employed approximately 70,800 people in the region²², representing a 9% increase of 6,000 jobs in the sector compared to 2017 figures.²³ Tourism NI also estimates that one in every 12 jobs in Northern Ireland is in tourism²⁴. In 2018, it was estimated that the annual tourism expenditure was £968 million of the total £42.2 billion Gross Valued Added in Northern Ireland²⁵, representing a 2.29% share by tourism of NI's entire GVA for that year.

By 2018, Northern Ireland had experienced a visitor revenue increase of 99% during the previous decade, with estimated revenue from overnight trips amounting to £968 million. Northern Ireland has hosted world-class events including the Open Golf tournament at Royal Portrush in 2019, with this event alone contributing £100 million to the Northern Irish economy²⁶ and demonstrating the significant positive economic impact of tourism on NI.

Due to the impact of the COVID-19 pandemic, global connectivity with air traffic into Northern Ireland's three airports reduced by 85% in early 2020. UK to Ireland sea transportation also reduced by 49% in 2020.²⁷ Activity of the tourism sector in Northern Ireland was estimated to have contracted by 83% in 2020, and by 50% in 2021, in comparison to 2019 figures. 2022 presented more hopeful statistics with an estimated 13% increase in activity reported.²⁸

Recovery from the pandemic is ongoing, with 64% of businesses interviewed as part of the October 2022 Tourism NI Industry Barometer reporting their turnover as being above (38%) or the same (26%) as pre-COVID levels.²⁹

The Northern Ireland tourism industry will continue to play a crucial part in not only the post-COVID recovery of Northern Ireland, but also in the successful fulfilment of the 10X Economic Vision. The industry's current and future alignment to the Vision will be explored in the following section.

²¹ Northern Ireland Annual Tourism Statistics 2019 | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

²² Tourism-Statistics-Annual-Publication-2019_0.pdf (nisra.gov.uk)

²³ Tourism NI Tourism Performance Statistics

²⁴ Career Opportunities at Tourism NI

²⁵ Tourism-Statistics-Annual-Publication-2019_0.pdf (nisra.gov.uk)

²⁶ United Kingdom | OECD Tourism Trends and Policies 2020 | OECD iLibrary (oecd-ilibrary.org)

²⁷ Tourism Recovery Action Plan (economy-ni.gov.uk)

²⁸ Our World in Data, Tourism NI, EY analysis.

²⁹ Tourism NI Industry Barometer October 2022

3. Tourism is aligned with the 10x Vision and is already delivering on key priorities

The Department's 10X Economic Vision, published in May 2021, embraces innovation to deliver a ten times (10X) better economy with benefits for all the people of Northern Ireland (NI), positioning NI amongst the elite small advanced economies in the world. The 10X Vision acknowledges that innovation, inclusivity and sustainability must extend to all parts of the economy, with traditional sectors such as agri-food, tourism and hospitality playing a vital role in the delivery of each of the ten guiding principles of DfE's 10X Vision.

To underpin the vision, the Department has identified ten guiding principles.

1. Address those issues that really matter and will make a lasting and positive difference in peoples' lives
2. Deliver positive economic, environmental, and societal outcomes
3. Support a greener, sustainable economy
4. Provide a fairer distribution of opportunities for all our people
5. Inspire the future generations to thrive
6. Position NI amongst the most competitive small advanced economies in the world
7. Focus on increasing innovation in high value-added areas and priority clusters resulting in higher wages
8. Deliver improved outcomes for all including better jobs with better wages for all our people, with a more flexible work environment and a better overall quality of life
9. Position NI as an optimum place to work, invest, live and visit
10. Shaped by public sector innovation and co-design with partnership working at its heart

The table below demonstrates how the Tourism sector is already contributing to the implementation of the operational principles of the 10X Economic Vision. It should be acknowledged that the first principle is broad-ranging and encompasses the following nine principles. Therefore, in order to avoid duplication, it has been omitted from the exercise.

10X Strategy Guiding Principles	Role of Tourism in the Delivery of this Principle	How it is currently delivering (Now)
<i>Address those issues that really matter and will make a lasting and positive difference in peoples' lives</i>	It should be acknowledged that the first principle is broad-ranging and encompasses the following nine principles. Therefore, specific contributions to each principle were detailed in the following lines.	
<i>Deliver positive economic, environmental and societal outcomes</i>	<ul style="list-style-type: none"> • Continuing to play a vital role in the post-COVID economic recovery of Northern Ireland • Contributing to a more inclusive economy 	<p>The NI tourism sector was reported to be worth an estimated £1 billion in 2019, accounting for 9% of all employee jobs in Northern Ireland, with tourism employee jobs growing by 6,000 compared with 2017.³⁰ While the industry still finds itself in a post-pandemic recovery transition, the Tourism NI Barometer reported that the industry has had a positive business performance over the January – September 2022 period with almost two-thirds reporting business turnover returning to or exceeding pre-COVID 2019 levels. The majority of accommodation providers report that room yields have been higher (41%) or similar (33%) to 2019, which is corroborated by STR hotel data.³¹ The tourism industry is already contributing to better outcomes for businesses in the sector. As one example, this year's Tourism NI Tourism Enterprise Development Programme will focus on people, sustainability, operations, digital capability and sales and marketing. The primary aim of this programme is to improve business operational performance to drive both immediate performance and long-term success through provision of business supports, toolkits and advice from industry experts.³²</p>
<i>Support a greener, sustainable economy</i>	<ul style="list-style-type: none"> • Supporting Northern Ireland in reaching its net-zero by 2050 goal • Reducing CO2 emission per tourist by: <ul style="list-style-type: none"> ○ Offering new sustainable offerings for tourists ○ Targeting closer to home markets ○ Increasing the accountability of tourist business and encouraging them to make their business models more sustainable ○ Creating a more seasonally balanced tourism offering ○ Leveraging digital solutions to increase carbon management efforts 	<p>Tourism NI has highlighted its respective commitments to sustainability over the coming years. These commitments include building on the series of Leaner and Greener masterclasses, continuing the Carbon Literacy for Tourism course and progressing its approach to sustainability accreditation for the NI tourism sector and its various sub-sectors.³³ Tourism Ireland is currently adapting its corporate strategy and emerging markets targets to focus on higher value tourists (less seasonal, less CO2 emissions/visitor, more regional markets, more spending per night). Visit Belfast and Belfast City Council have launched a partnership with Green Tourism³⁴ to position Belfast as a leader in sustainable tourism</p> <ul style="list-style-type: none"> • Visit Belfast is a Bronze-accredited organisation with Green Tourism • 15 hotels in Belfast are Green Stay accredited, including the Fitzwilliam and Grand Central³⁵ • 15 certified Green Attraction sites in Belfast including Ulster Hall and Titanic³⁶ <p>Northern Ireland already boasts a variety of eco-tourism-friendly accommodation spaces including Finnebrogue (County Down) and the Salthouse Eco-Lodges (County Antrim).</p>

³⁰ Tourism Trends. (s. d.). Tourism Northern Ireland. <https://www.tourismni.com/research-insights/tourism-trends/>

³¹ TNI's Industry Barometer Survey. (s. d.). Tourism NI - The Hub. <https://www.tourismni.com/research-insights/tourism-industry-barometer/>

³² Tourism enterprise development programme. (s. d.). Tourism Northern Ireland.

³³ Information provided by Tourism NI

³⁴ Green Tourism accreditation - Corporate Visit Belfast. (2022, March 25th). Corporate Visit Belfast. <https://visitbelfastpartners.com/partnership-2/green-tourism-accreditation/>

³⁵ Team, V. B. C. (2023, March 31). Accredited Green Stays in Belfast. Visit Belfast. <https://visitbelfast.com/article/accredited-green-stays-in-belfast/>

³⁶ Visit Belfast. (s. d.-b). Accredited Green Attraction Archives | Visit Belfast. <https://visitbelfast.com/browse/visitor/tags/accredited-green-attraction>

<p><i>Provide a fairer distribution of opportunities for all our people</i></p>	<ul style="list-style-type: none"> Continuing to create a more regionally-balanced tourism landscape through increased awareness-raising of regional hotspots and improved accessibility to and from these destinations. Ensuring that all tourism amenities are as accessible as possible for all tourists. 	<p>In Northern Ireland, 54.39% of tourism employees were reported as being female in 2019. In the same 2019 study, 15% of all 16-24 year olds in Northern Ireland were reported to be employed in the tourism industry, along with 8% of the total 25-34 age group, 5% of the 35-49 age group, and 6% of the 50-64 age group. When considering disabilities, the Northern Ireland tourism industry has a larger share of Equality Act-disabled employees than when looking at all other industries collectively. Of Northern Ireland's tourism workforce, 14% of people were reported as being Equality Act disabled, which is higher than the collective NI average of 11% across all industries.³⁷</p> <p>The Northern Ireland tourism industry is already successful in boasting a regionally-balanced tourism landscape. The Causeway Coast and Glens Local Government District (LGD) already boasts an 18% share of overall tourism spending (in 2019), with the Fermanagh and Omagh and Newry, Mourne and Down LGDs both boasting 8% respectively.³⁸ Collectively, this share represents 34% of total tourism spending in 2019.</p> <p>In terms of accessibility, Titanic Belfast and Giant's Causeway are two of the top-rated destinations for wheelchair-friendly facilities in Ireland. All of Titanic Belfast's circulation spaces and galleries are fully accessible for wheelchairs and mobility scooters. There are also two scenic lifts within the Atrium which take visitors to all levels of the experience. At Giant's Causeway, the maximum travel distance from the disability reserved parking bays is approximately 70 metres to the Visitor Centre entrance, where there is a unisex Changing Places facility comprising a peninsular WC, adjustable height changing table, sink, shower and overhead hoist.³⁹</p>
<p><i>Inspire the future generations to thrive</i></p>	<ul style="list-style-type: none"> Boosting the educational offering by tourism to young people, to inform them of Northern Ireland's past, stimulate enquiry, and encourage independent and collaborate learning 	<p>A variety of tourist destinations across Northern Ireland already offer curriculum-based learning sessions as part of their experience: Titanic Belfast, where the Titanic Experience is offered to school groups, and the Ulster Museum, where curriculum-based learning is delivered to school groups by demonstrators.</p> <p>Tourism is one of the industries which is represented in the DfE SKILL UP initiative in partnership with NI's Further and Higher Education institutions. As part of the initiative a range of free accredited courses are available to help people to re-train and re-skill, with "Tour Guiding Travel 2" and "Tourism Programme - L3 Award in Principles of Customer Service in Hospitality, Leisure, Travel and Tourism" part of this offering.⁴⁰</p>
<p><i>Position NI amongst the most competitive small advanced economies in the world</i></p>	<ul style="list-style-type: none"> Investing to create new and innovative tourism experiences so that Northern Ireland can remain a competitive tourist destination. Keeping up with macro-trends in the tourism industry in other geographies. 	<p>In October 2022, it was reported that an additional £2.85 million will be invested into the NI tourism industry, to promote and market Northern Ireland as a key tourism and business destination, especially during the autumn and winter seasons.⁴¹</p>
<p><i>Focus on increasing innovation in high value-added areas and priority</i></p>	<ul style="list-style-type: none"> Increasing our presence in the business tourism industry to position NI as a place to innovate 	<p>Tourism NI and The Society of Incentive Travel Excellence (SITE) Ireland have teamed up to deliver an educational initiative to support Northern Ireland's tourism industry. This partnership will develop the incentive tourism industry in Northern Ireland, provide networking and destination awareness opportunities, as well as equip businesses with the knowledge to deliver motivational travel experiences for future clients.⁴²</p>

³⁷ Northern Ireland tourism latest alternative data sources: March 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk) - Employment in the Tourism Industry aged 16 to 64 by section 75 categories Northern Ireland 2019

³⁸ Tourism local district. (s. d.). Tourism Northern Ireland Statistics.

³⁹ Beck, A. (2020, 2 October). Top 5 wheelchair accessible travel guide to Northern Ireland and Ireland. SYNC Living.

⁴⁰ N. (2023, 20 march). SKILL UP – the flexible skills programme. nidirect. <https://www.nidirect.gov.uk/skillup>

⁴¹ Hornby, M. (2022, 20 October). £ 2.85m To Strengthen NI Tourism Offerings. <https://www.4ni.co.uk/northern-ireland-news/290485/2-85m-to-strengthen-ni-tourism-offerings>

⁴² Simpson, D. (2022, 29 June). *Tourism NI And SITE Ireland Team Up To Deliver Educational Initiative To Support NI's Tourism Industry*. Hospitality Ireland.

<p><i>clusters resulting in higher wages</i></p>		
<p><i>Deliver improved outcomes for all including better jobs with better wages for all our people, with a more flexible work environment and a better overall quality of life</i></p>	<ul style="list-style-type: none"> Overcoming the recruitment challenges faced by the tourism industry in a post-COVID labour market Ensuring the tourism industry is deemed an accessible, competitive and attractive industry in which to work, incl. competitive salaries, clear career pathways and comfortable working conditions 	<p>In line with the actions prescribed in the Tourism Recovery Plan, a new JobStart Scheme was launched. The Scheme was designed by the Department for Communities (DfC) to help young people aged 16–24 at risk of long-term unemployment to get into the job market by providing government funding for employers to create job opportunities.⁴³</p> <p>In 2021, the Hospitality and Tourism Recovery Training Programme was launched by NI Further Education colleges in partnership with DfE. The Programme provided a skills-led approach to supporting managers as they moved through the pandemic restrictions into recovery ahead.⁴⁴</p>
<p><i>Position NI as an optimum place to work, invest, live and visit</i></p>	<ul style="list-style-type: none"> Making it as easy and attractive as possible for the tourist to travel to Northern Ireland 	<p>Between the months of January and September 2022, there were more than 809,000 (+53%) trips from the Republic to Northern Ireland compared to 530,000 during the same period in 2019.⁴⁵</p> <p>Belfast has received several Business Tourism accolades including:</p> <ul style="list-style-type: none"> Best Conference Destination 2022 - Conference & Incentive Travel (C&IT) Awards International Convention Centre (ICC) recognised as “Best Venue” 2022 - UK Digital Awards⁴⁶ Ranked as the eighth most sustainable destination - 2022 Global Destinations Sustainability Index⁴⁷ <p>Tourism NI has launched the Make it Here initiative to change perceptions of working in the tourism sector and help attract and retain more people. Participating organisations will receive resources from TNI to enhance their recruitment activities, learn of best practice recruitment and retention examples from other tourism organisations as well as have the opportunity to spotlight specific jobs and in turn receive increased promotion of roles.⁴⁸</p> <p>Northern Ireland has been promoted in mainland Great Britain with the support of Tourism Ireland. The £5/€5.7 million promotion campaign aimed to generate demand and drive bookings for short breaks and holidays in Northern Ireland during the autumn and winter months. The campaign was seen by millions and reached at least 80% of all adults in GB. The TV advertisement was seen by 12.8 million viewers and the digital campaign with The Guardian reached around 2.6 million people.⁴⁹</p>
<p><i>Shaped by public sector innovation and co-design with partnership working at its heart</i></p>	<ul style="list-style-type: none"> Supporting SMEs in the hospitality and leisure sector 	<p>In order to help tourism organisations in their journey to high-quality tourism offerings, Tourism NI operates a Quality Grading Scheme for Visitor Experiences. Tourism operators have a chance to be awarded with a one to five star rating to indicate the quality which can be expected by a patron. The Scheme is open to a wide range of tourist amenities in NI</p>

⁴³ Ireland, T. N. (2021, 18 April). *New JobStart Scheme Commences*. Tourism NI - The Hub. <https://www.tourismni.com/news/jobstart/>

⁴⁴ *Let's Do Hospitality and Tourism Programme | Belfast Chamber*. (2021b, May 13). Belfast Chamber.

⁴⁵ Tourism NI Welcomes Record Breaking Visitor Numbers from the Republic of Ireland in 2022, Tourism Northern Ireland, 13/02/2023 - CSO data used in absence of NISRA figures

⁴⁶ *Belfast named world's best conference destination - Corporate Visit Belfast*. (2022, 3 October). Corporate Visit Belfast.

⁴⁷ Belfast, I. (2023, 7 February). *Belfast ranks Top 10 Most Sustainable Destinations | ICC Belfast*. ICC Belfast.

⁴⁸ *Make it Here! Careers in Tourism & Hospitality | Tourism NI*

⁴⁹ Tourism Ireland Annual Report 2021

Research paper on the future of tourism in Northern Ireland

		<p>including museums, castles, historic houses, tours, art venues, wildlife experiences, gardens and garden centres.⁵⁰ The scheme is open to all visitor experiences across the region, with examples of graded experiences including Belleek Pottery - currently one of seven 4 Star Visitor Experiences in County Fermanagh⁵¹ – and Tracey’s Farmhouse Kitchen – graded as a 5 Star Tour Experience⁵².</p> <p>To face the hardships created by the COVID-19 pandemic on the hospitality industry, the UK government implemented the “Eat out to Help Out” scheme in 2020. The purpose of the scheme was to support and create jobs in those economic areas. The government subsidised up to 50% of food and non-alcoholic beverages in the participating establishments, up to £10 per person per order, from Monday to Wednesdays. 2,000 food outlets in NI (3% of total participating outlets) participated in the project, and more than 2.7m meals were discounted in NI.⁵³ The average claim per outlet was significantly higher in Northern Ireland than in either England, Scotland or Wales.⁵⁴</p> <p>In 2021, Tourism NI implemented “The Covid Business and Financial Planning Support Programme” to help small- to medium-sized tourism businesses (50-100k) in Northern Ireland assess the impacts of COVID-19 and develop a strategic business and financial recovery plan.⁵⁵</p> <p>To support the industry during the pandemic, 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 B&B, Guest House and Guest Accommodation Scheme.⁵⁶</p> <p>Tourism Northern Ireland has been working with a range of partners including local authorities to further collaborative working across the sector including in the form of formal ‘cluster’ groups (collaborative networks). This is a direct result of the COVID-19 pandemic and the strong alignment of tourism businesses behind the new experience brand, ‘Northern Ireland –Embrace a Giant Spirit’ which has furthered interest in collaborative partnerships.⁵⁷</p>
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In addition to the table above which demonstrates how tourism is already contributing to the successful fulfilment of 10X (the “Now” view), the table below looks at how the industry can continue contributing to the successful fulfilment of 10X in the future (the “Next and Beyond” view). This was developed to help identify the future challenges and underpin the associated recommendations to overcome these, using best-practice tourism examples from other nations.

⁵⁰ *Quality Grading Scheme*. (s. d.). Tourism NI - The Hub.

⁵¹ *Quality Grading Scheme*. (s. d.). Tourism NI - The Hub.

⁵² Tracey’s Farmhouse Kitchen. (2023, 20 march). *Tracey’s Farmhouse Kitchen | Come on In*. <https://traceysfarmhousekitchen.com/>

⁵³ Rice, B. C. (2020, 4 September). *Eat Out to Help Out : More than 2.7m meals discounted in NI*. BBC News. <https://www.bbc.com/news/uk-northern-ireland-54024030>

⁵⁴ *Eat Out to Help Out statistics - geographic breakdown commentary*. (2021b, December 21). GOV.UK.

⁵⁵ Ireland, T. N. (2021b, November 9). *Financial Programme for SMEs to Support Tourism Recovery*. Tourism NI - The Hub.

⁵⁶ *Tourism Recovery Action Plan*. (s. d.). Department for the Economy.

⁵⁷ *Developing tourism cluster groups*. (s. d.). Tourism NI - The Hub.

10X Strategy	How it can deliver in the future (Next and Beyond)	Challenge (as per this research study) which would be overcome
<i>Address those issues that really matter and will make a lasting and positive difference in peoples' lives</i>	It should be acknowledged that the first principle is broad-ranging and encompasses the following nine principles. Therefore, specific contributions to each principle were detailed in the following lines.	
<i>Deliver positive economic, environmental and societal outcomes</i>	<p>The Northern Ireland tourism industry can continue to deliver positive economic, environmental and societal outcomes and could emulate strategies developed by other nations to achieve this. In New Zealand, the Tourism Sustainability Commitment was established by Tourism Industry Aotearoa and aims to ensure that every New Zealand tourism business is committed to sustainability by 2025. The Commitment has established 8 industry-level sustainability Goals and 14 Commitments that individual businesses work towards to help reach the Goals, with a focus on four key areas:</p> <ol style="list-style-type: none"> 1. Economic Sustainability 2. Visitor Sustainability 3. Sustainable Host Communities 4. Environmentally Sustainable Tourism <p>The Sustainability Commitment aims to ensure economic, environmental and social sustainability becomes a genuine ethical underpinning of the New Zealand tourism industry.⁵⁸</p>	<ul style="list-style-type: none"> • Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination? • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?
<i>Support a greener, sustainable economy</i>	<p>Tourism NI are currently carrying out a study to quantify the carbon emissions of it as an organisation and subsequently develop a carbon reduction plan. Tourism NI intend to carry out a research project in 2023/24 to quantify the carbon footprint of the NI tourism sector. This valuable research project will enable a baseline to be established and allow comparisons with benchmark destinations. Progress towards the net zero ambition can then be measured in future years.⁵⁹</p> <p>Increased focus and investment in its domestic tourism offering will reduce the NI tourism industry's carbon footprint and in turn support it in its journey to net zero.</p> <p>To help support NI in its sustainability efforts, the tourism industry could look to leading sustainability destinations such as Estonia, which has been a member of the Global Sustainable Tourism Council (GSTC) since 2021.⁶⁰ Estonia has a well-developed sustainable tourism offering and prescribes to visitors week-long sustainable tours of the country which can be partly accessed by bicycle, and where transport is required, public transport can be leveraged.⁶¹</p>	<ul style="list-style-type: none"> • Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination?
<i>Provide a fairer distribution of opportunities for all our people</i>	The Northern Ireland tourism industry can continue to play a role in the equitable distribution of opportunities to all people in Northern Ireland, and could emulate programmes implemented in other comparator countries. In Italy, the FEEL IT project is training Deaf people and people with hearing impairments on the basic tasks and skills to work as travel agents	<ul style="list-style-type: none"> • Challenge #3: How can we develop an inclusive tourism model which benefits

⁵⁸ OECD Tourism Trends and Policies 2020 - Rethinking tourism success for sustainable growth. (s. d.). OECD.

⁵⁹ Information provided by Tourism NI

⁶⁰ Sustainable Estonia. (s. d.-b). Visitestonia.com. <https://www.visitestonia.com/en/forthetrade/sustainabilityplan>

⁶¹ A sustainable seven-day tour of Estonia | Visit Estonia. (s. d.). Visitestonia.com. <https://www.visitestonia.com/en/why-estonia/travelling-sustainably-through-estonia>

	<p>offering high quality and authentic tourism packages and experiences. FEEL IT will also train travel agents and tour operators in designing accessible tourist packages for Deaf and hard of hearing people.⁶²</p> <p>Northern Ireland could continue building on its successful regional distribution of tourism by referencing actions which have been taken by other nations such as Greece. Greece, as part of a nation-wide initiative to improve transport throughout the country, has prioritised transport infrastructure to facilitate visitor access to remote or previously inaccessible areas by land and/or water. This has involved critical investments to develop a number of regional airports. This improved access will support the national tourism strategy objective to promote less-known destinations and spread the benefits of tourism to the whole country.⁶³</p>	<p>the Region in its entirety and is accepted by locals?</p>
<p><i>Inspire the future generations to thrive</i></p>	<p>In order for tourism to continue having a positive impact on the lives of young people, Northern Ireland could reference successful tourism and young people projects implemented in other countries. Countries like Canada have invested heavily in supporting young people to get the skills, training and opportunities they need in the tourism and hospitality sector. In Canada, these investments include funding of \$15 million for eight Youth Employment and Skills Strategy (YESS) projects that provide placements for 1,100 youth. Tourism Saskatchewan is one organization which received funding for their Ready to Work Tourism Hospitality and Camp Services Careers initiative, which will give 180 young people the skills, knowledge and experience for long-term, stable employment in tourism.⁶⁴</p>	<ul style="list-style-type: none"> • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?
<p><i>Position NI amongst the most competitive small advanced economies in the world</i></p>	<p>Tourism will continue to play a key role in positioning NI amongst the most competitive small advanced economies in the world. One key to this will be continuing to improve the regionality and seasonality of the tourist offering. Canada has done this well previously through funding of shoulder-season offerings which will further develop Canada's competitive advantage in the winter months and provide more reasons to visit in the off-peak periods. These actions were underpinned by the Canadian tourism strategy "Creating Middle Class Jobs: A Federal Tourism Growth Strategy" which received CAD 58.5 million in funding through the Canadian Experiences Fund. This funding was used to help communities create, improve or enhance tourism products, facilities and experiences. The Fund is managed by the six Regional Development Agencies that work closely with businesses and innovators to fuel local and regional economic growth.⁶⁵</p>	<ul style="list-style-type: none"> • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?
<p><i>Focus on increasing innovation in high value-added areas and priority clusters resulting in higher wages</i></p>	<p>Digitisation will be a key driver in higher value-add and wages in the future, and the tourism industry too can leverage these opportunities. This is already taking place in countries like Malta, where the Ministry for Tourism and the Malta Tourism Authority introduced a Digital Tourism Platform to use AI to better target marketing activity and improve strategic planning. This will be enhanced by machine learning and is expected to generate positive benefits for businesses, including generating higher value added, improved business activity and cost mitigation through predictive analytics.⁶⁶</p>	<ul style="list-style-type: none"> • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?

62 Projects | ENAT. (s. d.). ENAT - European Network for Accessible Tourism. <https://www.accessibletourism.org/?i=enat.en.projects>

63 Rethinking tourism success for sustainable growth. (s. d.). OECD. <https://www.oecd-ilibrary.org/sites/82b46508-en/index.html?itemId=/content/component/82b46508-en>

64 Canada, E. A. S. D. (2022c, September 28). Government of Canada supports projects for youth in the growing tourism and hospitality sector. Canada.ca.

65 Rethinking tourism success for sustainable growth. (s. d.-b). OECD. <https://www.oecd-ilibrary.org/sites/82b46508-en/index.html?itemId=/content/component/82b46508-en>

66 Preparing tourism businesses for the digital future. (s. d.). OECD. <https://www.oecd-ilibrary.org/sites/f528d444-en/index.html?itemId=/content/component/f528d444-en>

<p><i>Deliver improved outcomes for all including better jobs with better wages for all our people, with a more flexible work environment and a better overall quality of life</i></p>	<p>Innovation will be a key driver in delivering improved outcomes for all, with initiatives such as Smart Destinations not only increasing the quality of the experience at the destination, but also improving the quality of life of its residents. A Smart Destination (SD) is an innovative tourist destination using state-of-the-art technology for the sustainable development of a tourist area, accessible to everyone. In Spain, the Smart Destinations initiative fosters innovation, sustainability and competitiveness at a local level through the development and deployment of ICT with the aim of creating differentiated and highly competitive services.⁶⁷</p>	<ul style="list-style-type: none"> • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?
<p><i>Position NI as an optimum place to work, invest, live and visit</i></p>	<p>To continue showcasing its attractiveness to future workers, investors, citizens and visitors, Northern Ireland could look to exemplary nations to further focus its efforts in this space. The Netherlands' Perspective 2030 provides a new vision of Destination Holland with the ambition that by 2030, every Dutch citizen will benefit from tourism. Perspective 2030 identifies five strategic pillars to guide tourism development:</p> <ol style="list-style-type: none"> 1. Balance of benefits and burdens - increasing the benefits of visits for all Dutch citizens and reducing the burdens to a minimum 2. All of Holland attractive - distributing visitors more evenly across Holland at different times 3. Accessible and reachable - developing an integrated transport system 4. Sustainability a must - improving its sustainability, employing raw materials in a circular manner, preventing pollution and waste, and CO2 emissions. 5. A hospitable industry - investing in the image, professionalism and attractiveness of the industry as an employer through new forms of training and development, attracting new employees, and offering opportunities for future career development.⁶⁸ 	<ul style="list-style-type: none"> • Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination? • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?
<p><i>Shaped by public sector innovation and co-design with partnership working at its heart</i></p>	<p>There is a significant opportunity for transformational public sector / tourism industry partnerships through the upcoming City and Growth Deals. A number of tourism-related projects are expected to receive funding across the relevant NI City and Growth Deals, including The Gobbins Phase 2 (Belfast Region), Slieve Gallion (Mid South West Region) and Dunluce Castle (Causeway Coast and Glens).⁶⁹ £1.2 billion in capital funding has been committed over the next 15 years across the four NI City and Growth Deals.⁷⁰</p> <p>The successful partnership between government and public sector bodies will be key to the NI tourism industry's successful fulfilment of 10X. Northern Ireland could look to exemplary comparator countries such as Sweden, where collaboration between national agencies has been strengthened through dialogue and structured working processes to inform a common agenda and activity plan. In this instance, this collaboration includes 16 agencies relating to nine different ministries and has led to improved methods and decision-making in areas such as infrastructure and traffic planning to better meet the needs of tourism (developed in close co-operation with the Swedish Transport Administration, Swedish Agency for Economic and Regional Growth and Dalarna University.)⁷¹</p>	<ul style="list-style-type: none"> • Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination? • Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID? • Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?

⁶⁷ *Rethinking tourism success for sustainable growth.* (s. d.-c). OECD. <https://www.oecd-ilibrary.org/sites/82b46508-en/index.html?itemId=/content/component/82b46508-en>

⁶⁸ *Rethinking tourism success for sustainable growth.* (s. d.-c). OECD. <https://www.oecd-ilibrary.org/sites/82b46508-en/index.html?itemId=/content/component/82b46508-en>

⁶⁹ Information provided by DfE

⁷⁰ City and Growth Deals | Department for the Economy (economy-ni.gov.uk)

⁷¹ Sweden | OECD Tourism Trends and Policies 2020 | OECD iLibrary (oecd-ilibrary.org)

4. The tourism sector will face three main challenges by 2030

While the Northern Ireland tourism industry has been subject to the significant challenges posed by the COVID-19 pandemic and more recently those posed by the ongoing cost of living crisis (which has in turn increased the cost of doing business), the research as part of this study points to three main challenges which the industry will have to overcome in looking towards 2030 and therefore be aligned with the 10X Strategy. These three overarching challenges have been informed by the overall desktop research undertaken in this exercise, and have been presented in this document to align with the three Pillars of the 10X Vision: Inclusiveness, Innovation and Sustainability.⁷² Throughout the following section, in addition to the examples in the previous table, further best-practice examples have been included to demonstrate countries' responses to the various challenges to help underpin the recommendations and support the NI tourism industry in identifying how it may respond to these challenges.

The short summary table below demonstrates how each of the three challenges relates to the relevant Pillar of 10X.

Challenge	Link to 10X Pillar
Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination?	Sustainability
Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID?	Innovation
Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?	Inclusiveness

Addressing these challenges will ensure that the tourism industry continues to contribute to the successful fulfilment of the 10X Economic Vision in the most meaningful way that it can.

Challenge #1: How can we increase the resilience of the tourism sector against climate change and airplane dependency for an island destination?

The Northern Ireland tourism sector will have to overcome environmental and sustainability concerns, directly impacting on supply and demand in Northern Ireland. On the one hand, the sector will have to mitigate against airplane dependency and the rise of carbon prices, which may limit affordability for external tourists. On the other hand, global warming and the rising sea levels are affecting coastlines and infrastructure of tourism destinations across the world. This section and its subsequent recommendations relate to the Sustainability Pillar of 10X.

Description of the challenge

The effects of climate change are starting to be felt not only in foreign countries, but even in the UK, with close-to-home examples including the floods in the West Midlands in January 2021 and the torrential downpours which submerged London Underground stations in the summer of 2021.

The latest report by the International Panel on Climate Change (IPCC) warns that if global warming is not restricted to 1.5°C above pre-industrial levels, the following threats are likely to become reality:

- Increased frequency of floods and fires which have been observed around the world in recent years

⁷² Measuring Success - 10X Metrics to achieve a 10X Economy (economy-ni.gov.uk)

- Increased likelihood of failing crops
- Sea levels driving mass migration as millions are forced from their homes
- Melting of the arctic permafrost and releasing millennia of stored greenhouse gases
- Extinction of some species⁷³
- Northern Ireland land is rising of 0.4mm (about 0.02 in) per year, and the actual rate of annual sea rising is 3.4mm (about 0.13 in) per year. This observation still means that the net level rise in NI is around 3mm (about 0.12 in) per year.⁷⁴

Sustainable Travel International estimates that 8% of the world's carbon emissions are generated by activities relating to tourism, including the fuel required to fly passengers to their destinations⁷⁵. Northern Ireland has a high dependency on tourists arriving via sea and air, whereby in 2019, of the 5.3 million overnight trips taken in Northern Ireland, around 3 million (56%) of these were taken by external visitors (visitors originating from outside of NI). This share by external visitors represented 70% of estimated total spending from NI overnight trips in 2019.⁷⁶ Of the 3 million external visitor overnight trips, 1.46 million (48.7%) came from Great Britain, 783,000 (26.1%) came from outside of the UK and Ireland, and 756,000 (25.2%) came from the Republic of Ireland.⁷⁷ In December 2019, Northern Ireland air passenger flow for the previous 12 months was recorded at 8.9 million⁷⁸, demonstrating NI's airplane dependency at the time. The vulnerability in this dependency was exposed due to the fact that, during the COVID-19 pandemic, global connectivity with air traffic into Northern Ireland's three airports reduced by 85% in early 2020. UK to Ireland sea transportation also reduced by 49% in 2020.⁷⁹

While NI has a dependency on both sea and air travel as part of its external tourism (78% of passengers were reported to depart NI via airports and the other 22% via seaports in the 12 months leading up to October 2022⁸⁰), the dependency on air travel creates a high risk as carbon prices may continue to rise in the future, resulting in a reduction of airline demand. This will exacerbate the issues relating to the reduction of air traffic in Belfast since the COVID-19 crisis, where air passenger flow had decreased by 3.3 million when comparing July 2019 figures with July 2022 figures⁸¹. To contextualise these rising prices, a study published by the European Commission in 2019⁸² presented various scenarios to measure the impact of future regulations. The scenario introducing fuel excise duty demonstrates that a 33 cents tax per litre of fuel would result in a price rise of 10% for airplane tickets. Such a tax would reduce number of flights and passengers by the same proportion (11%). While this tax would correspond with a 10% reduction in CO2 emissions and an aviation-related fiscal revenue increase from €10 billion to €27 billion, there would be a reduction of 11% in the number of direct jobs and the value added by the aviation sector. On a more local scale, the introduction of a fuel excise duty in the UK would cause the average ticket price to increase by 11% compared to current figures, and the number of flights and passengers to decline by 12%. This poses the risk of reducing the number of direct jobs and the value added by the aviation sector by 12%.

To further underpin these forecasts, the French DGAC (General Directorate of Civil Aviation) in 2020 estimated that the proposals made by the Citizens Convention for Climate to implement a tax ranging

⁷³ HM Government - Net Zero Strategy: Build Back Better

⁷⁴ Climate Change: Northern Ireland and the rising sea | ScopeNI (nicva.org)

⁷⁵ *Carbon Footprint of Tourism - Sustainable Travel International*. (2022c, august 24). Sustainable Travel International. <https://sustainabletravel.org/issues/carbon-footprint-tourism/>

⁷⁶ *Northern Ireland Annual Tourism Statistics 2019*. (s. d.). NISRA.

⁷⁷ Northern Ireland Annual Tourism Statistics 2019

⁷⁸ Northern Ireland tourism latest alternative data sources: March 2023 – total air passenger flow | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

⁷⁹ Tourism Recovery Action Plan (economy-ni.gov.uk)

⁸⁰ Northern Ireland tourism latest alternative data sources: March 2023 - Departing passengers through NI ports (% through airports/seaports) | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

⁸¹ Northern Ireland tourism latest alternative data sources: March 2023 – total air passenger flow | Northern Ireland Statistics and Research Agency (nisra.gov.uk)

⁸² European Commission, Taxes in the Field of Aviation and their impact, June 2019

from €30 to €400 per ticket⁸³ (depending on travel class and the distance) would cut the number of air travellers by 14-19% per year in France.

To remain competitive as a tourist destination, Northern Ireland will need to strike the balance between managing the risks associated with rising carbon prices and maintaining connectivity of airports between target tourist markets. There is a large Irish/American link (approximately 10.77% of total expenditure of external overnight trips to Northern Ireland in 2019 was generated by tourists from North America—approximately £78.67 million), with the majority of American visitors arriving into NI via Dublin Airport which will naturally be difficult to maintain without air connectivity. Post-Brexit regulations have the potential to threaten the US link to NI due to the incoming Electronic Travel Authorisation (ETA) system which will generally need to be completed by all non-British/Irish citizens before entering the UK – this includes international tourists who land in Dublin and would like to travel to Northern Ireland even if for a day trip.⁸⁴ This factor alone could prompt Northern Ireland to consider novel approaches in order to mitigate its dependency on tourists coming from outside of the UK via airplane.

Solutions implemented elsewhere

Whilst it is important to note Northern Ireland's limited tax raising powers, a range of countries and their tax initiatives in this area are presented below:

- Sweden implemented a **carbon tax on domestic flights** in 1991. The tax is based on the distance flown and the type of aircraft used, and the revenue is used to fund climate-related projects.
- Norway introduced a **carbon tax on domestic and international flights in 2016**. The tax is based on the amount of CO₂ emitted per passenger, and the revenue is used to fund climate and environmental projects.
- The Netherlands introduced a **tax on airline tickets in 2021**, which applies to all flights departing from Dutch airports. The tax is based on the distance flown and the class of travel, and the revenue is used to fund climate and transportation projects. According to the Dutch press, this tax, introduced in 2021, was supposed to increase from 7.45 euros to 24 euros per passenger departing from the Netherlands.
- Austria has set a floor price of 40 Euros on departing carriers.⁸⁵

A benchmark on small island destinations highlights the commitments and efforts made to adapt to airplane dependency.

- Across Pacific Islands for example, a collective effort is being made to use larger aircrafts rather than more flights to lower carbon miles per visitor and maintain the length of stay. They have implemented share codes from customer's origin and destination, promoted air passes to facilitate island hopping and multi-destination holidays, and introduced through-pricing beyond hubs to final destinations and target short-haul tourists. For instance, the Vanuatu island depends on 71% of its total tourism through Australian and other Pacific Island tourism.⁸⁶
- The Balearic Islands have increased their emphasis on a less-seasonal tourist offering in recent years and have introduced a sustainable tourism tax which by 2022 had funded 46 local conservation projects including the restoration of remote mountain lodges and protecting the Posidonia seagrass. €104 million in taxes were raised in 2019 by this initiative and by 2021, a further €270 million had been raised.

⁸³ France and its new environmental eco tax on aviation – Business Traveller

⁸⁴ Irish border: Changes made to travel authorisation scheme - BBC News

⁸⁵ The Shift Project, aviation report, 21/10/21

⁸⁶ Sustainable Tourism Product Development Opportunities in the Pacific Islands, UNWTO, 2022

For more information, the exhaustive small island benchmark analysis is presented in Appendix #2.

On a broader scale, small advanced economies are succeeding in putting sustainability at the forefront of tourism. The analysis of these comparators below highlights several exemplary initiatives.

Country	Description
Estonia	Estonia has been a member of the Global Sustainable Tourism Council (GSTC) since 2021. ⁸⁷ The country has a well-developed sustainable tourism offering and prescribes to visitors week-long sustainable tours of the country which can be partly accessed by bicycle, and where transport is required, public transport can be leveraged. ⁸⁸
Iceland	Iceland has deployed a range of measures to mitigate the effects of climate change including: <ul style="list-style-type: none"> • The Varða/Sites of Merit programme which aims to integrate climate adaptation into a wider destination management framework at popular tourist sites • Recovery dashboard by the Icelandic Travel Industry Association which monitors performance against policy goals set out in the Tourism Future Vision until 2030, using indicators such as the share of companies with measurable sustainability goals, and the condition of tourist attractions within protected areas • Releasing funding to accelerate the electrification of harbours and the rental car fleet • The Icelandic Pledge which encourages people to take a more active role in managing impacts and sets norms or expectations in order to increase environmental awareness⁸⁹
New Zealand	New Zealand’s Tourism Sustainability Commitment was established by Tourism Industry Aotearoa and aims to ensure that every New Zealand tourism business is committed to sustainability by 2025. The Commitment has established 8 industry-level sustainability Goals and 14 Commitments that individual businesses work towards to help reach the Goals, with a focus on four key areas: <ol style="list-style-type: none"> 1. Economic Sustainability 2. Visitor Sustainability 3. Sustainable Host Communities 4. Environmentally Sustainable Tourism <p>The Sustainability Commitment aims to ensure economic, environmental and social sustainability becomes a genuine ethical underpinning of the New Zealand tourism industry.⁹⁰</p>
Slovenia	Slovenia was declared the first Green Country in the World at the Global Green Destinations Day in 2016. The country’s Green Scheme of Slovenian Tourism (GSST) is a tool developed at the national level and a certification programme which offers tools to destinations and service providers that enable them to evaluate and improve their sustainability endeavours. Certified offerings are then promoted through the Slovenia Green brand. Currently there are 62 Green Certified Slovenian destinations, 139 accommodation facilities, 59 restaurants and seven travel agencies. ⁹¹

⁸⁷ Sustainable Estonia. (s. d.-b). Visitestonia.com. <https://www.visitestonia.com/en/forthetrade/sustainabilityplan>

⁸⁸ A sustainable seven-day tour of Estonia | Visit Estonia. (s. d.). Visitestonia.com.

⁸⁹ Chapter 3. Promoting a green tourism recovery | OECD Tourism Trends and Policies 2022 | OECD iLibrary

⁹⁰ OECD Tourism Trends and Policies 2020 - Rethinking tourism success for sustainable growth. (s. d.). OECD.

⁹¹ Green Scheme of Slovenian tourism | I feel Slovenia

Recommendations

1. Define and measure tourism value added

The definition and measurement of the value created by the tourism sector has changed drastically over the last two decades, **moving from a predominantly quantitative approach to a more qualitative** approach. In the 2000s, **tourism "performance" indicators** calculated the number of tourists visiting a territory over a given period. However, this purely quantitative approach showed that profitability was not always linked with the rise of tourist numbers. In the early 2010s, studies focused on a more qualitative approach: from then on, the total amount spent by each visitor on the entire value chain of the hospitality sector was calculated, giving a finer idea of the concrete benefits of tourism for each territory.

While previous years prioritised increasing revenue per tourist and efforts to entice them to lengthen their stay in NI, different indicators must now be deployed to find a balance between economic impact, environmental impact and social impact. On environmental impact, the analysis focuses on

- **Measuring the environmental consequences of tourism practices** on the territories and mitigate them (decarbonisation of the sector and especially mobility, limiting soil artificialisation, particularly by touristic infrastructures in natural areas, biodiversity footprint, focus on regionality).
- **Measuring risks induced by the physical consequences** of climate change and the **level of vulnerability / adaptation** of the territories to these consequences (rising water levels and retreat of the coastline, multiplication of periods of high heat and droughts, tension of water and energy resources).

Examples of possible new KPIs:

- CO2 footprint per visitor per stay
- Water & energy consumption in the tourism industry
- Water and solid waste in the tourism industry
- Measurement of consciousness of tourists (Definition by World United nations)
- Share of renewable sources of energy in accommodation and gastronomy

2. Plan for Rising Carbon Prices in airplane tickets and investment into public transport for use by tourists visiting Northern Ireland

- Decarbonize internal transport with buses, trains and bikes
- Integrate working groups of insular tourism economies to share knowledge in conjunction with the UK diplomatic network. Such groups could include the Small Island Developing States (SIDS) - a distinct group of 38 UN Member States and 20 Non-UN Members/Associate Members of United Nations regional commissions that face unique social, economic and environmental vulnerabilities.⁹²
- Reinforce local production and consumption, promote a local brand to encourage higher uptake of local food and beverage products and reduce import dependency
- Target short-haul tourists: develop domestic tourism and the connections with the Republic of Ireland

3. Undertake studies to understand and adapt to the tangible consequences of climate change for hospitality and leisure businesses

- For example, identify through a study the areas facing rising sea levels or natural hazards to implement a mitigation scheme

⁹² About Small Island Developing States | Office of the High Representative for the Least Developed Countries, Landlocked Developing Countries and Small Island Developing States

Challenge #2: How can we innovate to answer new demands from domestic and international tourists post-COVID?

Northern Ireland will need to maintain its attractiveness to domestic and international tourists by investing and innovating in its products. Focusing on domestic tourism, business tourism and experiential tourism (i.e., the search for immersion travel, engagement with locals, culture and environment) could help NI in answering the challenges of rising carbon prices and demand in order to support a more responsible way to travel. This section and its subsequent recommendations relate to the Innovation Pillar of 10X.

Description of the challenge

Northern Ireland will need to build on the rise of all-Island tourism. In 2022, Tourism NI reported that an estimated 809,000+ trips were made from ROI to NI in the first nine months of 2022 – this represents an increase of 53% compared to the same period in 2019. In the same reporting period, people in the Republic of Ireland accounted for 1.94 million overnight stays in Northern Ireland, representing a 600,000+ (46%) increase compared to 2019. Tourism NI also reported a collective tourist spend of £164 million in this reporting period, representing a 68% increase from 2019. This averages out at a spend of around £603,000 per day.⁹³ This increase can largely be attributed to the behaviour changes caused by the COVID-19 (i.e. hesitancy by some to travel abroad) as well as the impact of the ongoing cost of living crisis, leading people to holiday more locally.

The demand for experiential tourism is also growing at a global scale and Northern Ireland will need to innovate to adapt to this new demand by building on and supplementing the existing wide range of tourism experiences offered such as the Seamus Heaney HomePlace and the Ulster American Folk Park.⁹⁴ Bloomberg reported in 2021 that 86% of millennials want to travel for experience, culture, in an immersive way to avoid tourist traps. 60% ranked authentic culture as an essential part of their trip, with 78% wanting their trip to be educational.⁹⁵ To answer this need, more and more tourism players are positioning their offering on local activities: learning local know-how, discovering cultural tradition, food tours, and bike rides. In 2022, Airbnb was reported to offer 50,000 experiences across 1,000 cities globally.⁹⁶ This number is 20% higher than in 2021, where only 40,000 experiences were reported globally on Airbnb.⁹⁷

To remain competitive at an international scale, NI needs to also rely on specific categories of tourism, such as business tourism (as it can stimulate economic growth by providing networking opportunities, promoting professional development and increase economic visibility for a destination) and sport tourism (specifically golf tourism due to its potential for significant economic contributions - the 2019 Open Golf tournament at Royal Portrush contributed £100 million to the Northern Irish economy). In 2021, the UK was ranked fifth-best country for non-leisure tourism according to the Travel and Tourism Development Index.⁹⁸ More locally, Belfast has received a variety of Business Tourism accolades including Best Conference Destination 2022 - Conference & Incentive Travel (C&IT) Awards and “Best Venue” 2022 - UK Digital Awards which was received by the International Convention Centre⁹⁹ The market value of global business travel industry is expected to increase by 188% between 2020 and 2028, demonstrating the great potential business travel has in the UK.¹⁰⁰ However, digitalisation accelerated by COVID-19

⁹³ Tourism NI Welcomes Record Breaking Visitor Numbers from the Republic of Ireland in 2022, Tourism Northern Ireland, 13/02/2023 - CSO data used in absence of NISRA figures

⁹⁴ Experiences - Discover Northern Ireland

⁹⁵ What is experiential travel and why are travellers going to demand more of it in 2022 and beyond? Discova

⁹⁶ 2022 Airbnb Statistics: Usage, Demographics, and Revenue Growth, Stratojet, 04/01/22

⁹⁷ Airbnb experiences 2021 edition, Arrival travel, 2021

⁹⁸ Business travel in the UK, Statista, November 2022

⁹⁹ *Belfast named world's best conference destination - Corporate Visit Belfast.* (2022, 3 October). Corporate Visit Belfast. <https://visitbelfastpartners.com/article/belfast-named-worlds-best-conference-destination/>

¹⁰⁰ Business travel in the UK, Statista, November 2022

will lead to increasing hybrid meetings which require CAPEX investments in specific hubs sectors such as Belfast.

Solution implemented elsewhere

Many destinations around the world have implemented strategies which put experiences at the core of their destination branding, for both international and domestic tourism. The table below summarises several of these examples.

Initiative	Main objective	Description
National Experience content initiative (Australia, 2021)¹⁰¹	Destination branding	\$12 million content creation initiative aimed at supporting tourism businesses across Australia by helping them better market their experiences. The initiative extended to 1,500 tourism experiences across 57 regions in Australia and was met with positive feedback by local tourism operators.
Welcome to the Icelandverse campaign (Iceland, 2021)¹⁰²	Destination branding	Marketing campaign emulating Mark Zuckerberg and the metaverse to promote real-life experiences in Iceland. The Icelandverse supported Iceland in quickly gaining global attention with the initiative receiving 6 million views upon release.
Escape the Everyday campaign (United Kingdom, 2021)¹⁰³	Appealing to domestic visitors	£5 million domestic campaign highlighting visitor attractions and experiences on offer across the UK's cities, countryside and coast to boost tourism across the shoulder season and beyond
Smart Destinations	Increasing the quality of the experience at the destination and also improving the quality of life of its residents	A Smart Destination (SD) is an innovative tourist destination using state-of-the-art technology for the sustainable development of a tourist area, accessible to everyone. In Spain, the Smart Destinations initiative fosters innovation, sustainability and competitiveness at a local level through the development and deployment of ICT with the aim of creating differentiated and highly competitive services. ¹⁰⁴
Smart Tourism at Napa Valley (USA)	Using new technologies to attract tourists	Wine producers in the Napa Valley utilise Wi-Fi, the Internet-of-Things, and geolocation software to target nearby tourists in a destination and invite them to enjoy a wine experience during their visit ¹⁰⁵
Explorer's Road (United Kingdom)	Supporting tourism SMEs to take part in a Smart Ecosystem	As part of a 300-mile touring route that stretches the length of England, SMEs along the route are supported to take part in a Smart Ecosystem, with a focus on small businesses who want to operate online and have an ambition to reach new international markets. SMEs are equipped with digital tools and training, including, dedicated one-to-one support to develop booking functionality and help businesses take advantage of new distribution channels, the route currently showcases 118 businesses, 19 destinations and 9 counties. The Explorer's Road web portal promotes all associated destinations and businesses and provides a means for

¹⁰¹ Tourism Australia

¹⁰² Visit Iceland

¹⁰³ Visit Britain

¹⁰⁴ *Rethinking tourism success for sustainable growth*. (s. d.-c). OECD.

¹⁰⁵ Preparing tourism businesses for the digital future | OECD Tourism Trends and Policies 2020 | OECD iLibrary

		independent travellers to contact operators directly. ¹⁰⁶
Financial (Slovenia)	incentives	Incentivising tourism businesses to become more digitally enabled
		Financial incentives are offered by the Ministry of Economic Development and Technology to support the creation of digital innovation hubs, e-commerce supports for companies entering new markets and public supports for the digital transformation of businesses. Digital vouchers of up to EUR 10 000 can be used by SMEs to raise digital competencies, develop a digital business strategy, move to digital marketing and improve cyber security. ¹⁰⁷

When considering the opportunities posed by the business tourism industry, Northern Ireland could look to successful comparator cities in this space. A table summarising the most highly regarded business tourism destinations and their successful attributes can be found below.

Business tourism destination	Description
Vienna, Austria	<ul style="list-style-type: none"> Ranked as Number 1 city in the world as part of the International Congress and Convention Association (ICCA)'s Destination Performance Index 2021.¹⁰⁸ During the reporting period, 92 congresses were held in the city, nine of which were unrestricted, 22 hybrid and 61 virtual (113 congresses were planned)¹⁰⁹ In 2021, 31 events – 15 of which attracted international participants – took place at the Austria Centre Vienna. These events included the IPU World Conference - which attracted parliamentary speakers and presidents from more than 100 nations -, the International Society of Aesthetic Plastic Surgery (ISAPS) World Congress, the Börsetag private investor conference and the introductory lectures of the Vienna University of Business and Economics (WU).¹¹⁰ Smart City Index: Vienna was ranked number 1 out of 153 cities in 2019¹¹¹
Lisbon, Portugal	<ul style="list-style-type: none"> Ranked as Number 2 city in the world as part of the ICCA's Destination Performance Index 2021 Lisbon has hosted various international conferences including the 2022 UN Ocean Conference¹¹² and is set to host the Intelligent Transport Systems (ITS) European Congress 2023 in May¹¹³ The annual Web Summit Lisbon attracts over 1,000 renowned speakers and CEOs across a range of industries, as well as more than 70,000 visitors from across the world¹¹⁴
Athens, Greece	<ul style="list-style-type: none"> Ranked as Number 3 city in the world as part of the ICCA's Destination Performance Index 2021 In 2021, Athens hosted 87 international association meetings of all forms with a total of 35,345 participants The city has hosted major international conferences such as the IFLA World Library and Information Congress (2019), the MTJ Medical Travel Summit (2018), the American Society of Travel Agents Destination Expo (2018), and the TBEX Travel Bloggers Exchange (2014).¹¹⁵

¹⁰⁶ Preparing tourism businesses for the digital future | OECD Tourism Trends and Policies 2020 | OECD iLibrary

¹⁰⁷ Preparing tourism businesses for the digital future | OECD Tourism Trends and Policies 2020 | OECD iLibrary

¹⁰⁸ ICCA Destination Performance Index 2021

¹⁰⁹ ICCA Report 2021: Vienna in 1st place worldwide despite pandemic - vienna.convention.at

¹¹⁰ Vienna claims top spot in the 2021 ICCA ranking: Austria Centre Vienna sees clear upturn in conferences | Austria Centre Vienna (acv.at)

¹¹¹ Number 1 in the Smart City ranking - vienna.info (wien.info)

¹¹² 2022 UN Ocean Conference | United Nations

¹¹³ ITS European Congress Lisbon 2023

¹¹⁴ Web Summit Lisbon: What It's All About and Who's There (beportugal.com)

¹¹⁵ Athens continues to rise as a destination for meetings during 2021 | This is Athens ACVB

	<ul style="list-style-type: none"> • Athens is easily reached by international tourists: international carrier Aegean Airlines services 80 destinations in 41 countries¹¹⁶
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The solutions demonstrated above have all been supported by significant investment from Government, even though it should be noted that countries also require other investment revenues into tourism.

To help present the level of investment required, a table has been included below to demonstrate the central budget allocations to tourism across the referenced EU countries in 2018. The figures include the central budget allocation to the relevant national tourism agency/board, designated governmental tourism department (where applicable), as well as any additional disclosed EU funding. Northern Ireland figures have also been included as a baseline. A more comprehensive table including further EU countries can be found in Appendix #3.

Location	Central Government budget allocation to tourism (€,000s) - 2018 ¹¹⁷	Population (million) - 2018 ¹¹⁸	Central Government budget allocation to tourism per head (€)
Northern Ireland ¹¹⁹	42,842 (£37,510)	1.9 ¹²⁰	2.25
Spain	336,000	46.83	7.17
Portugal	288,000	10.28	28.02
Greece	63,700	10.73	5.94
Austria	69,800	8.85	7.89
Iceland	14,815	0.34	43.57
Slovenia	13,500	2.08	6.49

¹¹⁶ Meetings and conventions (thisisathens.org)

¹¹⁷ OECD Tourism Trends and Policies 2020 | OECD Tourism Trends and Policies | OECD iLibrary

¹¹⁸ Oxford Economics Global Data Workstation

¹¹⁹ Provided by DfE

¹²⁰ 2020 mid-year Population Estimates for Northern Ireland, NISRA, 2020, Statistical Bulletin - 2019 Mid-year Population Estimates for Northern Ireland (nisra.gov.uk)

Recommendations

1. Continue measuring the economic impact of tourism in NI

- Identify local areas with heightened dependency on tourism, stabilise demand throughout the year to avoid excessive seasonal peaks, and prioritise profitability for a viable development

Examples of possible KPIs for profitability and seasonality:

- Amount spent per visitor per stay
- Income per traveller and target visitors
- Economic dependency on tourism per area (% of jobs related to tourism activities per area)
- Openness to travel of tourists (evolution of demand in time)
- Yearly distribution of stays

2. Put digital and experiences at the core of its tourism offering to stay competitive at an international level

- Over the last years, Tourism Northern Ireland has been working with a range of partners including local authorities to further collaborative working across the sector including in the form of formal 'cluster' groups (collaborative networks). This is a direct result of the COVID-19 pandemic and the strong alignment of tourism businesses behind the new experience brand, 'Northern Ireland –Embrace a Giant Spirit' which has furthered interest in collaborative partnerships.
- Develop digital experiences in activities that are adapted (museum) and promote the destination for digital nomads. Successful initiatives are already under way in this space which will attract digital nomads, including the increased provision of remote working hubs (WorkSpace, Portrush¹²¹) and improvement of broadband connectivity across Northern Ireland by extending Next Generation Access (NGA) broadband infrastructure.¹²²

3. Leverage the power of business tourism and large-scale business events to position NI as a world-class tech destination globally

Major business tourism events could put NI on the map as an attractive and innovative place to work, live and invest. Major tech companies have already decided to invest in NI and this strategy can further influence businesses to invest. Belfast is already strong in the medical/pharmaceutical conferencing space and the city has won a number of awards on conference facilities. Work has already been undertaken to build on Northern Ireland's attractiveness as a Business Tourism destination. Tourism Ireland, together with around 800 industry partners, participated in over 60 virtual trade promotions between January and October 2021 – meeting, and doing business with, over 15,000 important travel trade contacts. These promotions also concerned Northern Ireland and included a Northern Ireland Virtual Expo in North America.¹²³

There is also a current opportunity to build on the worldwide attention which NI is receiving due to high-profile engagements such as the visit of President Joe Biden to NI in April 2023.

¹²¹ The WorkSpace now open in Portrush offering remote working solutions - Causeway Coast & Glens Borough Council ([causewaycoastandglens.gov.uk](https://www.causewaycoastandglens.gov.uk))

¹²² Project Stratum | Department for the Economy (economy-ni.gov.uk)

¹²³ Tourism Ireland Annual Report 2021

Challenge #3: How can we develop an inclusive tourism model which benefits the Region in its entirety and is accepted by locals?

Northern Ireland must measure and anticipate the social acceptability of tourism in its territory, whether positive or negative. Tourism has a major strength: it plays a key role in a more inclusive and labour-intensive economy. The industry offers a range of entry/pathway opportunities and roles which are accessible to all. These include both part- and full-time working arrangements, and in some sub-sectors, the opportunity to volunteer at large-scale cultural events which can offer invaluable experience and serve as a stepping stone for people to progress into paid employment. On the other hand, the increased concentration of flows in certain areas and at certain times of the year (over-tourism) can also result in negative oversaturation and nuisances for local populations that must be anticipated and resolved. While Northern Ireland offers tourist experiences across the region and is successful in capturing tourist spend outside of the capital city (the Causeway Coast & Glens LGD represented 18% of total NI tourist spend in 2019), Belfast remains by far the most popular destination, with 34% of total day trips, 32% of total overnight trips and 40% of total tourist spend for NI in 2019 being captured within the Belfast City LGD.¹²⁴ This section and its subsequent recommendations relate to the Inclusiveness Pillar of 10X.

Challenge #3.1: support a more inclusive economy and reinforce the attractiveness of the tourism sector

Description of the challenge

Tourism offers opportunities for a range of skilled workers, but, importantly to the NI economy, also offers opportunities for those that are considered lower skilled. In the European Union, only 25 to 30% of employees in the tourism sector have primary or secondary education. Tourism also promotes inclusivity as it is a major employer for women: 54% of global tourism workforce is represented by women.¹²⁵ This proportion was 39% in the global economy in 2015.¹²⁶ On a Northern Ireland level, this gender inclusivity is corroborated by the fact that, in 2019, 54.39% of tourism employees were reported as being female. In the same study, the age distribution of tourism employees was stable across the 16-24, 25-34 and 35-49 age groups, each with a 26% share of total tourism employees. When considering disabilities, the Northern Ireland tourism industry has a larger share of Equality Act-disabled employees than when looking at all other industries collectively. Of Northern Ireland's tourism workforce, 14% of people were reported as being Equality Act disabled, which is higher than the collective NI average of 11% across all industries.¹²⁷ These figures underpin the inclusivity of the Northern Ireland tourism industry as an employer.

However, the tourism sector is now facing a global labour shortage and lack of attractiveness. Shortage of labour is a global tendency and has been prevalent in the tourism and hospitality sector for several years. The COVID-19 pandemic has worsened the situation: due to the restrictions and short time working schemes, many employees responded to the effects of the crisis and gradually turned towards jobs which they considered to be more attractive and rewarding. In a paper published by Hospitality and Tourism Skills (HATS) and Tourism NI, it was reported that only 15% of the public believe that Tourism is an appealing sector to work in, with only 12% considering Hospitality an attractive sector. In the piece, tourism employees stated that the three most negative attributes of the job were sacrificing personal and social life due to work, low pay and an absence of proper training. Those in the hospitality sector

¹²⁴ Tourism NI All LGD Fact Cards 2019

¹²⁵ *Women's empowerment and tourism* | UNWTO. (s. d.). <https://www.unwto.org/gender-and-tourism>

¹²⁶ Women in the changing world of work

¹²⁷ Northern Ireland tourism latest alternative data sources: March 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk) - Employment in the Tourism Industry aged 16 to 64 by section 75 categories Northern Ireland 2019

stated working evenings, low pay, and working weekends as the three most negative attributes. These statistics display a clear trend amongst tourism and hospitality staff and underpin the public's perception of the tourism industry as an unattractive sector in which to work. Furthermore, when asked of desired benefits that they would like to see introduced, the benefit "clear path for progression" featured in the top three benefits requested by both hospitality and tourism employees.¹²⁸ Sentiments relating to low pay are verified by the fact that, in 2022, only 59.2% of NI tourism employees aged 18 and over were reported to be earning above the Real Living Wage. This is behind the NI average of 85.5%.¹²⁹ Additionally, the 2021 gross weekly median pay for full-time tourism employees was £400, which was less than the collective NI industries figure of £575¹³⁰ – a difference of £175 per week. Sentiments related to career progression are verified by the fact that only 54.6% of tourism employees aged 18 and over are reported to have opportunities for career progression. This figure is behind the NI average of 58.3%.¹³¹

Staffing shortages in the tourism industry have also been felt at a Northern Ireland-level, with hospitality and tourism businesses reported to be struggling to recruit a full workforce, resulting in closures and scaled back service.¹³² An example of the impact of these labour shortages includes the prolonged closure of the popular North Coast tourist attraction Carrick-a-Rede Rope Bridge, which was unable to re-open after the lifting of lockdown restrictions due to difficulties in filling vacancies.¹³³ Efforts have been made to attract workers back into the industry. For example, Tourism NI has launched the Make it Here initiative to change perceptions of working in the tourism sector and help attract and retain more people. Participating organisations will receive resources from TNI to enhance their recruitment activities, learn of best practice recruitment and retention examples from other tourism organisations as well as have the opportunity to spotlight specific jobs and in turn receive increased promotion of roles.¹³⁴

These labour shortages pose an economic and social risk for certain areas in Northern Ireland which strongly depend on tourism. Using 2019 statistics, the diagram below presents the relationship between the dependency on tourism jobs in each LGD¹³⁵ and GDP per capita¹³⁶ in each LGD. The data, with the exception of Belfast, presents a trend that, where GDP per capita is low, for example in the Ards and North Down area, the dependency on tourism jobs is higher. An additional map illustrating this dependency per local area across the Island of Ireland can be found in Appendix #4.

¹²⁸ T&H Industry Research Debrief Takeaway (tourismni.com)

¹²⁹ Northern Ireland tourism latest alternative data sources: March 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk) - Work Quality Indicator - Earnings

¹³⁰ Northern Ireland tourism latest alternative data sources: March 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk) - Median weekly earnings in Tourism related industries

¹³¹ Northern Ireland tourism latest alternative data sources: March 2023 | Northern Ireland Statistics and Research Agency (nisra.gov.uk) - Work Quality Indicator - career progression

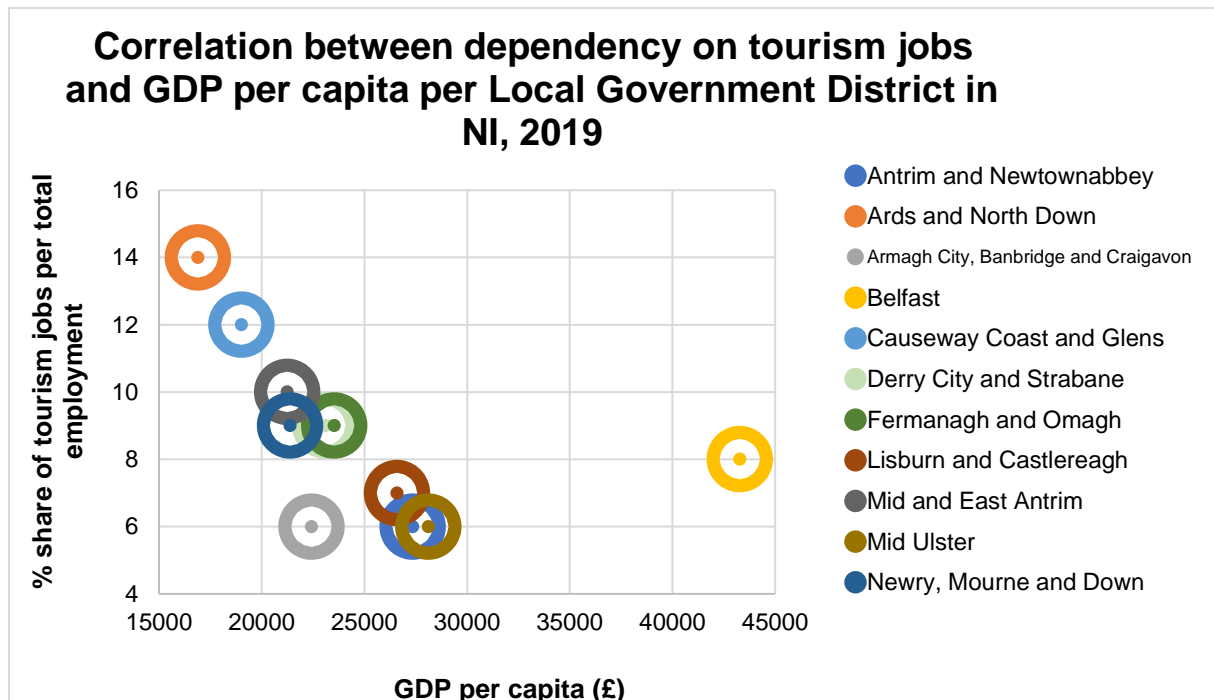
¹³² New Campaign To Attract Staff Into Hospitality & Tourism (tourismni.com)

¹³³ Carrick-a-Rede staffing issues industry-wide, says National Trust - BBC News

¹³⁴ Make it Here! Careers in Tourism & Hospitality | Tourism NI

¹³⁵ Employment estimates in Accommodation, Food, Arts, Entertainment and recreation – EY Oxford Economics

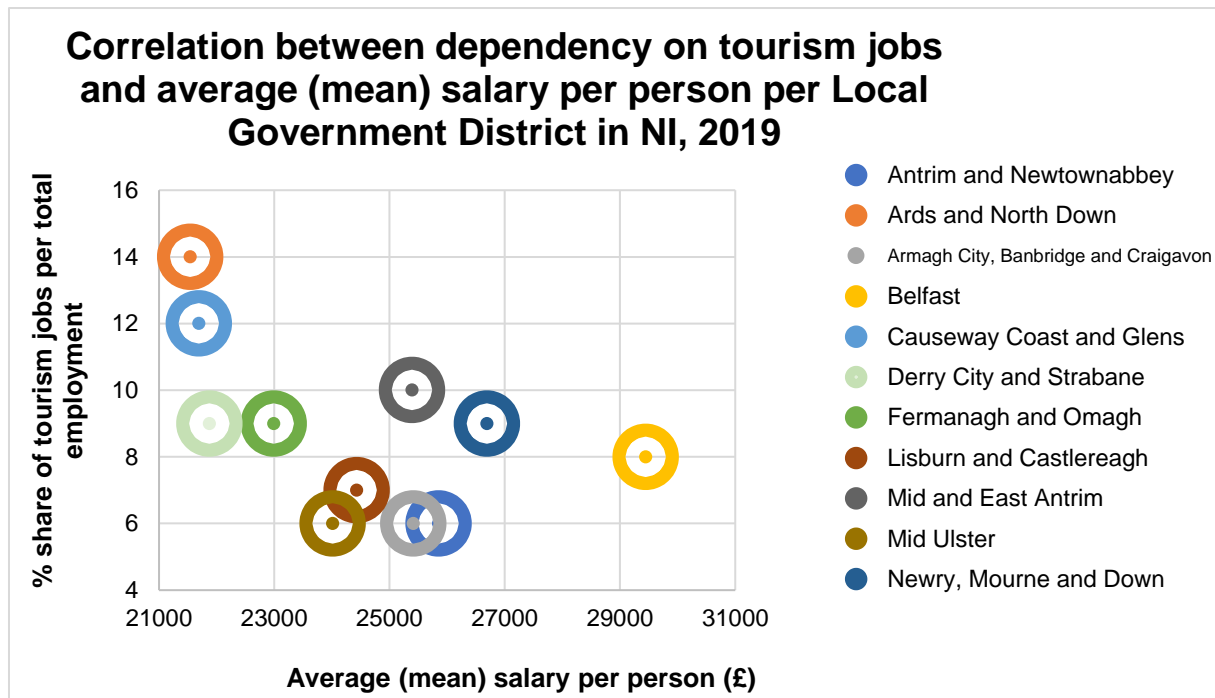
¹³⁶ Regional economic activity by gross domestic product, UK - Office for National Statistics (ons.gov.uk)



Local Government District	% share of tourism jobs per total employment	GDP per capita (£) - 2019
Antrim and Newtownabbey	6	27,353
Ards and North Down	14	16,896
Armagh City, Banbridge and Craigavon	6	22,420
Belfast	8	43,286
Causeway Coast and Glens	12	19,008
Derry City and Strabane	9	23,099
Fermanagh and Omagh	9	23,532
Lisburn and Castlereagh	7	26,586
Mid and East Antrim	10	21,238
Mid Ulster	6	28,108
Newry, Mourne and Down	9	21,385

A further diagram below demonstrates the correlation between tourism jobs dependency and average (mean) salary (all sectors) per LGD¹³⁷ in 2019.

¹³⁷ InstantAtlas™ Report (nisra.gov.uk)



Local Government District	% share of tourism jobs per total employment	Mean salary per district (£) - 2019
Antrim and Newtownabbey	6	25,850
Ards and North Down	14	21,541
Armagh City, Banbridge and Craigavon	6	25,414
Belfast	8	29,447
Causeway Coast and Glens	12	21,693
Derry City and Strabane	9	21,872
Fermanagh and Omagh	9	22,988
Lisburn and Castlereagh	7	24,431
Mid and East Antrim	10	25,392
Mid Ulster	6	24,012
Newry, Mourne and Down	9	26,692

In a similar fashion to the previous GDP diagram, the results broadly demonstrate that when dependency on tourism jobs is higher in an area, the average salary per person will be decreased. This is related to a lower level of qualification and productivity in this industry (low digitalisation and automation of processes).

Solutions implemented elsewhere

Research including that of labour unions in France (France Alliance Tourism and UMIH) has identified four main pain points to explain the tourism sector's lack of attractiveness. To meet these challenges, labour unions and companies in the sector have implemented solutions to ensure attractiveness of tourism sector in these main areas¹³⁸:

Area	Detail	Examples of implemented solutions
Remuneration	Remuneration is not attractive enough and does not correspond to the arduousness of jobs	Tax and social exemption of digitised tips in France, hours worked beyond the 36th hour in hospitality sector are now considered as overtime In Ireland, workforce shortages remain a key challenge for the tourism sector, but pressure has started to ease as employers increase pay rates, introduce more flexibility in shift patterns and introduce penalty rates. This saw vacancies reduce from 40,000 to 22,000 in tourism and hospitality jobs in 2022. This was facilitated by a campaign by state tourism officials and industry leaders to address the foundational issues behind the sector staffing crisis and capability-building initiatives to support businesses to leverage this campaign and stand out in a competitive labour market. A Learning Hub has been created to provide free high-quality and self-directed learning courses to help upskill staff and build capability within businesses. ¹³⁹
Working conditions	Working conditions are no longer in line with workers' expectations, leading to quiet quitting and a shift of the labour force to other sectors	Many independent groups in the hospitality sector have adapted the organisation of work to improve Quality of Working Life (QWL) at work. These groups have implemented best practices such as: four-day week, flexible contracts, guaranteed number of weekends, reduced or paid day breaks, self-planning, layout of premises for employees, offering of accommodation and meals.
Communication and attractiveness	Inadequate communication around job offers leads to a lack of attractiveness	In 2022, Pestana, Portugal's largest hotel chain with operations in 14 countries, offered staff health insurance, career progression and training programmes which helped the group hire more than 1,000 new workers in Portugal.
Training	Training for tourism jobs is becoming inadequate and does not seize all opportunities	Many countries are setting up voluntary mentoring systems between youth and professionals. In France, paid tourism volunteers were trained to be able to welcome and give directions to tourists in Paris.
Inclusion	Ensuring that the tourism sector is accessible for all citizens	In Italy, the FEEL IT project is training Deaf people and people with hearing impairments on the basic tasks and skills to work as travel agents offering high quality and authentic tourism packages and experiences. FEEL IT will also train travel agents and tour operators in designing accessible tourist packages for Deaf and hard of hearing people. ¹⁴⁰
Attracting young people	Supporting young people to get the skills, training and opportunities they need in the tourism and hospitality sector	In Canada, investments in young people include funding of \$15 million for eight Youth Employment and Skills Strategy (YESS) projects that provide placements for 1,100 youth. Tourism Saskatchewan is one organization which received funding for their Ready to Work Tourism Hospitality and Camp Services Careers initiative, which will give 180 young people the skills, knowledge and experience for long-term, stable employment in tourism. ¹⁴¹

¹³⁸ Alliance Tourisme France : The proposals of the Alliance France Tourisme to reinforce the attractiveness of the tourism sector and to reorganise training

¹³⁹ Chapter 2. Building resilience in the tourism ecosystem | OECD Tourism Trends and Policies 2022

¹⁴⁰ Projects | ENAT. (s. d.). ENAT - European Network for Accessible Tourism.

¹⁴¹ Canada, E. A. S. D. (2022c, September 28). Government of Canada supports projects for youth in the growing tourism and hospitality sector. Canada.ca.

<p>Digitisation and emerging technology</p>	<p>There is an opportunity to move jobs, which were traditionally regarded as lower value, up the value chain through digitisation and emerging technologies</p>	<p>In Malta, the Ministry for Tourism and the Malta Tourism Authority introduced a Digital Tourism Platform to use AI to better target marketing activity and improve strategic planning. This will be enhanced by machine learning and is expected to generate positive benefits for businesses, including generating higher value added, improved business activity and cost mitigation through predictive analytics.¹⁴²</p> <p>Singapore embraced Industry 4.0 has been successful in moving its industrial base up the value chain to strengthen its position as the leading industrial hub for companies worldwide. This has been aided by national initiatives such as the SkillsFuture Series in Advanced Manufacturing and the Singapore Skills Frameworks which are tailored to each industry's needs, containing detailed information on career pathways, skills listings, and available courses for skills upgrading.¹⁴³</p>
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In addition to recruitment and retention, countries have also demonstrated their commitment to ensuring that tourism benefits all citizens. One example is that of the Netherlands. The Netherlands' Perspective 2030 provides a new vision of Destination Holland with the ambition that by 2030, every Dutch citizen will benefit from tourism. Perspective 2030 identifies five strategic pillars to guide tourism development:

1. **Balance of benefits and burdens** - increasing the benefits of visits for all Dutch citizens and reducing the burdens to a minimum
2. **All of Holland attractive** - distributing visitors more evenly across Holland at different times
3. **Accessible and reachable** - developing an integrated transport system
4. **Sustainability a must** - improving its sustainability, employing raw materials in a circular manner, preventing pollution and waste, and CO2 emissions.
5. **A hospitable industry** - investing in the image, professionalism and attractiveness of the industry as an employer through new forms of training and development, attracting new employees, and offering opportunities for future career development.¹⁴⁴

Challenge #3.2 Anticipate and limit over tourism

Northern Ireland needs to anticipate the consequences of mass tourism¹⁴⁵ such as oversaturation and nuisances in some areas or times of the year which may lead to resistance from local people. This has already been experienced in locations such as Barcelona, where 59.9% of local residents think that the city has reached the limit of its capacity and the districts with the most visitors, Ciutat Vella and Gràcia, would like to see less tourists.¹⁴⁶ There is also a need to remain vigilant and to anticipate the role of short stay accommodation in increasing rent costs and housing prices. This is already excluding local people who live in or around tourist hotspots of NI (such as the North Coast) from accessing the housing market for their own residential needs, causing them to move elsewhere.¹⁴⁷ Other jurisdictions in the UK and Ireland have already begun work in this space, with tax implications already in place for second home owners in England¹⁴⁸, Scotland¹⁴⁹ and the Republic of Ireland¹⁵⁰.

¹⁴² *Preparing tourism businesses for the digital future.* (s. d.). OECD.

¹⁴³ Advanced Manufacturing | Industry 4.0 | Singapore EDB

¹⁴⁴ Rethinking tourism success for sustainable growth. (s. d.-c). OECD.

¹⁴⁵ Mass tourism refers to the movement of a large number of tourists to popular holiday destinations It is characterized by the use of standardized package products and mass consumption

¹⁴⁶ Barcelona in numbers: Tourism, between wealth and residents' complaints | Barcelona Metròpolis | Barcelona City Council

¹⁴⁷ North coast of NI property boom 'pushes locals away' - BBC News

¹⁴⁸ Gove closes tax loophole on second homes - GOV.UK (www.gov.uk)

¹⁴⁹ Tax Changes for Second and Empty Homes - 17th April 2023 | COSLA

¹⁵⁰ Local Property Tax (LPT) (citizensinformation.ie)

Description of the challenge

Over-tourism causes open conflicts between the different users of regions, especially due to increased congestion, rising housing prices in tourist hotspots and over-use of infrastructure. This situation has already happened in various European capitals. In Barcelona, for instance, a study in the *Journal of Urban Economics* showed in 2020 that short-term booking platform activity is provoking for the average neighbourhood a rise of 1,9% in rents and +4,6% in transactions prices. The estimated impact in neighborhoods with high short-term rental activity is substantial. For neighborhoods in the top decile of short-term rental activity distribution, rents have increased by 7% and 17% in housing prices.¹⁵¹

Northern Ireland is also affected by these issues: NISRA reported a 13% year-on-year increase in house prices in the Causeway Coast and Glens LGD in Q3 of 2021.¹⁵² According to data held by Tourism NI, the number of self-catering-registered accommodation stock in NI increased by 2,334 units from 1,434 in 2015 to 3,768 in 2022. This represents a 163% increase over the seven-year period.

As an illustration, the diagram below compares the average price per night for tourist accommodation advertised on one short-term rental booking platform with the average rent per month as advertised on a local residential property advertising website, across the key five tourist towns along the North Coast. Where “N/A” is stated, this implies that no properties were available for rent in the area at the time of the search.

The following key assumptions and disclaimers should be noted when referring to the price comparison exercise:

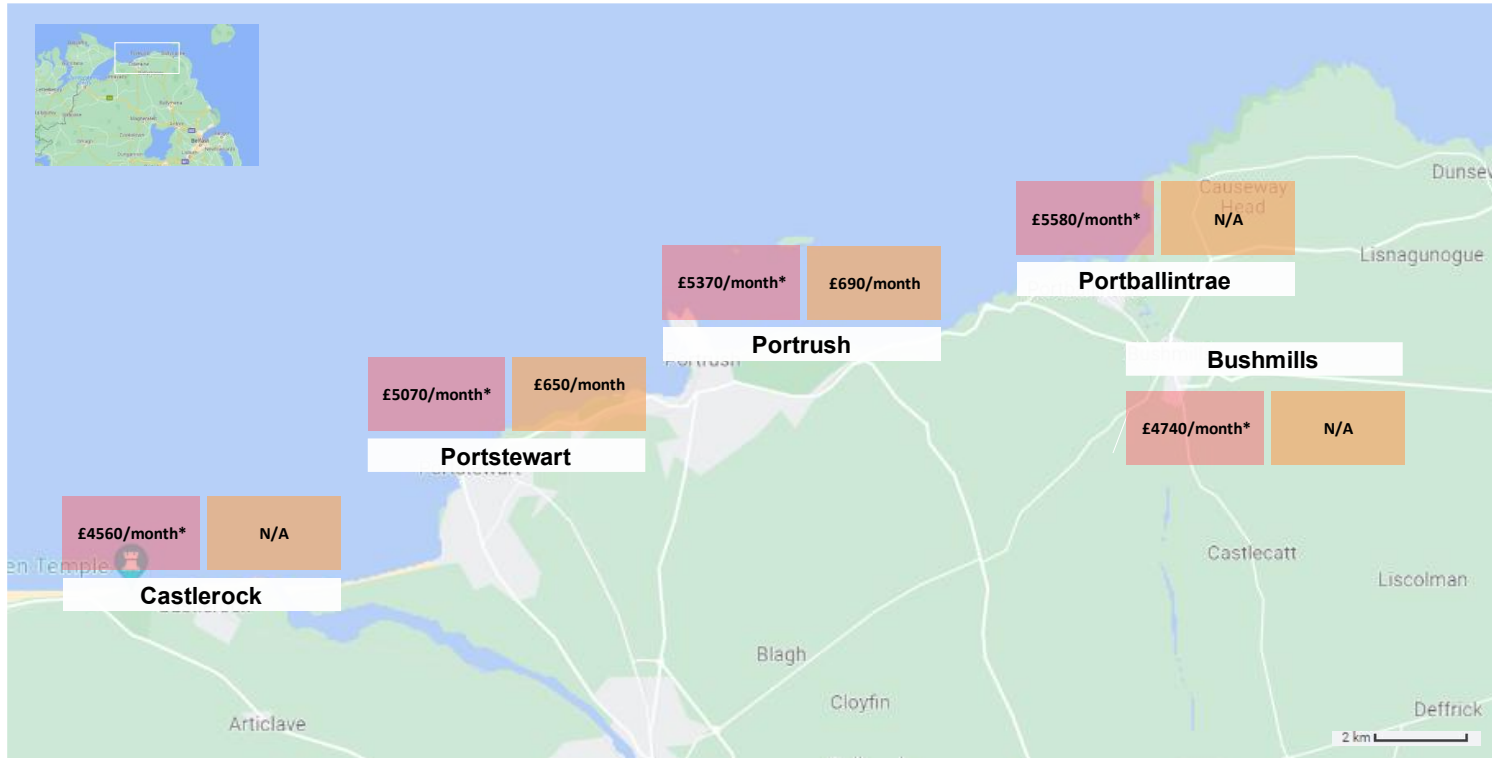
- Assessment conducted represents only one point in time. North Coast accommodation is subject to seasonal price fluctuations i.e. while the average price per night for short-term rental accommodation in Portstewart is £169 in March, this may increase to a higher amount during the summer months due to increased tourist demand
- Only two-bedroom properties were captured in the comparison exercise
- When identifying the available short-term accommodation, the date of 27th March 2023 was selected, with a +/-7day flexibility applied to the search function to capture further properties and increase average night price accuracy. Provision of accommodation and average price per night may differ if a different sample period were to be selected
- Total average monthly cost for short-term accommodation in each area was calculated by multiplying the average price per night in each area by 28
- All data accurate as at Friday 10th March 2023 when the search was undertaken

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Comparison of average price per month for tourist accommodation advertised on a short-term booking platform with the average rent per month advertised on a local residential property advertising site

North Coast of NI, March 2023



£5070/month
Average price per month on short-term booking platform in March 2023

N/A
Average monthly rent on local residential property advertising site in March 2023

The average short-term rental price per month was calculated from the average price per night on the booking platform, assuming that a month has 30 days.

Comparison of average price per month for tourist accommodation advertised on a short-term booking platform with the average rent per month advertised on a local residential property advertising site (*table format*)

North Coast of NI, March 2023

Location	Average price per month on short-term booking platform in March 2023 (£)	Average monthly rent on local residential property advertising site in March 2023 (£)
Bushmills	4,470	N/A
Castlerock	4,560	N/A
Portballintrae	5,580	N/A
Portrush	5,370	690
Portstewart	5,070	650

Solution implemented elsewhere to regulate tourism numbers

In many places, efforts are put into actions to regulate tourism flows in certain areas over short cyclical periods during the day or during the year. In Amsterdam, live data based on mobile companies measures the number of tourists in an area. If the area is too crowded, it offers another attraction in a quieter part of the city through a messaging system. In the south of France (Calanques, Porquerolles), a limit on permitted visitors in an area is defined to prevent soil erosion and ensure the preservation of biodiversity. An awareness campaign titled “to reserve is to preserve”, an incentive to book in advance your visit, was specifically created to address the matter.

To boost regionality, Greece, as part of a nation-wide initiative to improve transport throughout the country, has prioritised transport infrastructure to facilitate visitor access to remote or previously inaccessible areas by land and/or water. This has involved critical investments to develop a number of regional airports. This improved access will support the national tourism strategy objective to promote less-known destinations and spread the benefits of tourism to the whole country.¹⁵³ Canada has also demonstrated its commitment to regionality and seasonality through funding of shoulder-season offerings which will further develop Canada’s competitive advantage in the winter months and provide more reasons to visit in the off-peak periods. These actions were underpinned by the Canadian tourism strategy “Creating Middle Class Jobs: A Federal Tourism Growth Strategy” which received CAD 58.5 million in funding through the Canadian Experiences Fund. This funding was used to help communities create, improve or enhance tourism products, facilities and experiences. The Fund is managed by the six Regional Development Agencies that work closely with businesses and innovators to fuel local and regional economic growth.¹⁵⁴

Many initiatives to regulate tourist residences and short stays on the territory were taken at a national level. Our study on regulation focused on six European countries particularly facing challenges of over-tourism: France, Germany, Italy, UK, Spain and the Netherlands. Ireland and Northern Ireland were also introduced to provide a scale of comparison.

The study showed different levels of regulations: France and the Netherlands have for instance strongly regulated short-term rentals and digital platforms. These national laws may be completed at a more local level in some cities like Paris or Amsterdam. In some other countries like Spain, the UK or Germany, the law is designed per region or area. Of all studied countries and regions, Italy and Northern Ireland have the most flexible regulation over short-stay rentals.

Regulations on short-term rentals have also been implemented in European capitals (see table below¹⁵⁵). Of all 10 cities studied (Belfast, Dublin, Amsterdam, Berlin, Barcelona, Paris, Milan, Rome,

¹⁵³ Rethinking tourism success for sustainable growth. (s. d.). OECD.

¹⁵⁴ *Rethinking tourism success for sustainable growth.* (s. d.-b). OECD.

¹⁵⁵ Responsible hosting in the Netherlands - Airbnb Help Centre

¹⁵⁵ Responsible hosting in Spain - Airbnb Help Centre

¹⁵⁵ Responsible hosting in the United Kingdom - Airbnb Help Centre

¹⁵⁵ The Tourism (Northern Ireland) Order 1992 (legislation.gov.uk)

¹⁵⁵ Responsible hosting in Italy - Airbnb Help Centre

¹⁵⁵ Responsible hosting in Ireland - Airbnb Help Centre

¹⁵⁵ Responsible hosting in France - Airbnb Help Centre

¹⁵⁵ Regulation of European cities in the face of Airbnb, Albaric Cristelle, Lettre des réseaux

¹⁵⁵ Declaration of non-furnished housing, Paris City

¹⁵⁵ Understanding Short-Term Rentals Regulations in Italy - Keycafe Blog

¹⁵⁵ A guide to holiday-rental laws and regulations in Spain by region (spanishpropertyinsight.com)

¹⁵⁵ Madrid puts restrictions on Airbnb to ease mass tourism | CNN

¹⁵⁵ Madrid Bans Airbnb Units Without Private Entrances - Bloomberg

¹⁵⁵ Berlin had some of the world’s most restrictive rules for Airbnb rentals. Now it’s loosening up. - The Washington Post

¹⁵⁵ Regulation of European cities in the face of Airbnb, Albaric Cristelle, Lettre des réseaux

¹⁵⁵ Understanding Barcelona’s Short-Term Rental Regulations - Keycafe Blog

¹⁵⁵ Berlin - Airbnb Help Centre

¹⁵⁵ New regulations mean Berlin authorities will track Airbnb host listings (iamexpat.de)

Madrid, London), all ask for local authorisations to operate (licenses, registrations or permits) in order to regulate short-term rentals. Annual landlord overnight cap is the second most common regulation (6/10), followed by restrictions on type of space rented, for instance primary or secondary residence, private room or full residence (5/10). The less commonly used regulation is the annual city overnight cap (1/10), only used by Amsterdam.

Regulations on short term rentals and platforms in 10 European cities

City	Regulation	City annual overnight cap	Landlord annual overnight cap	Restricted pressure areas	Regulated length of stay	Local authorizations Permit licences, registrations	Type of property / space rented restriction	Necessity of landlord presence in the rented property
Belfast (NI)	Tourist residences must be registered through the Tourism Certification Scheme since 1992	No	No	No	No	Yes	No	No
Dublin (IRE)	Home-sharing is allowed inside "rent pressure zones" only when a house is a person's primary residence. Planning permission must be obtained 1) to rent one's principal property over 90 days a year 2) to offer short term let in a secondary property.	No	Yes	Yes	No	Yes	Yes	No
Amsterdam (NE)	In 2020, short-stay rental platforms were banned from three districts in the city, and elsewhere require a permit and a registration number. The city has capped annual overnight stays in the city to 20 million. Short term renting to tourists is limited for a maximum of 30 nights per year. It is also forbidden to sub-rent an apartment	Yes	Yes	Yes	No	Yes	Yes	No
Berlin (GER)	Private room rentals required a free-of-charge notification if this room is more than 50% of the total size of the residence. A permit is required to rent entire residence on a short-term basis. However, owner-occupiers can rent out their primary homes without time restrictions after obtaining a permit from city officials, and can rent out second homes for up to 90 days each year after applying for a permit.	No	Yes	No	No	Yes	Yes	No
Barcelona (SP)	Rentals for less than 31 days must be identified as "tourist households" by local government under strict restrictions (submit certificate of occupancy, have inspections, declaration of operation, permit to operate, taxes). Short term rentals are otherwise completely banned.	No	No	No	Yes	Yes	No	No
Paris (FR)	In Paris, accommodation offered for rent or subletting through a digital platform cannot be rented more than 120 days a year when the accommodation is the main residence of the lessor. The rental of a secondary residence requires the prior obtaining of authorization from the town hall to modify the use of the local accommodation intended for tourist rental. It is possible to rent a room in a primary residence without registration if the lessor lives here.	No	Yes	No	No	Yes	Yes	Yes
Milan , Rome (IT)	Short term rentals need to obtain a permission (CIR number) from the town council. Fine for not presenting CIR code can range from 500 to 2500 euros.	No	No	No	No	Yes	No	No
Madrid (SP)	Residents in the city center can rent their appartement for up to 90days, otherwise they require a private entrance. Minimal rental period is 5 days. Single room occupancy is prohibited	No	Yes	Yes	Yes	Yes	Yes	No
London (UK)	In London, homeowners can rent house, flats and spare rooms for up to 3 months a year. Some exceptions to the "90night rule" exist in certain areas.	No	Yes	No	No	Yes	No	No

¹⁵⁵ Top Cities Where Airbnb Is Legal or Illegal (investopedia.com)

¹⁵⁵ Short-term rental regulations: 2023 regulation sentiment & performance (seetransparent.com)

Recommendations

1. Monitor the social impact of tourism on local populations on an ongoing basis: well-being, quality and evolution of the living environment, conflict of use and socio-spatial disjointedness.

Example of possible KPIs on

- Seasonality
 - Number of tourists during the off-peak season
 - Impacts of regulation of mass tourism in time
- Regionality:
 - Tendency to spend night outside big cities (number of nights)
 - Length of stay as longer stays have a higher probability to venture outside main cities
- Economy:
 - Increase of local rents and housing prices due to short-stay accommodation prices
 - Perception and attitude of communities toward tourism
 - Visitor satisfaction
 - Tourism employment by gender, age group, social class, level of qualifications

#3.1 Attractiveness and inclusivity

1. Strengthen the attractiveness of tourism jobs and retain employees in the sector

- Create national campaigns to promote tourism employment, work on tourism governance
- Generalise exchange practices, learning and sharing experiences
- Diversify employee profiles to target a larger scale of competences and people with different level of education
- Responding to the challenges of arduousness of tourism professions while facilitating recruitment and return to employment
- Provide sustainable and targeted solutions for seasonal workers

2. Rethink training programmes to be aligned with the needs of companies and destinations

- Promote and develop the excellence in training offering
- Reforming teaching conditions and adapting curriculum content
- Longer-term training and development pathways to enhance the prospect of an extensive career in tourism
- Bringing training institutions closer to companies and destinations
- Modernise and develop continuous education in an inter-profession, inter-sector capacity

#3.2 Limit over tourism

1. Monitor and redirect tourism flows

- Identify and monitor by indexes the density of tourists per area, in time and nuisances created
- Diversify tourism attractions and destinations to distribute tourism flows over the whole territory and during all times of the year

2. Monitor housing prices around tourism destinations

- Identify key areas with high demand for tourist accommodation
- Develop an index of rising land prices and rents
- Develop a quality index for tourist accommodation

3. Pilot regulations for short stays rents and digital platforms in specific locations

- Reinforce local regulation in high-demand touristic areas where land pressure is higher.
 - Different types of regulations can be implemented depending on the desired level of regulatory requirements. Regulations such as restricted pressure areas, permit to operate are limiting the negative effects of mass tourism.

- These regulations can vary according to criteria such as: region, season, type of housing (main or secondary residence).
- Define and implement price caps for housing and land prices.

5. Appendices

Appendix #1: Linkages Between Report Recommendations and the Upcoming NI Tourism Strategy Proposed Pillars

Recommendation	NI Tourism Strategy Pillars				
	Attractive	Collaborative	Inclusive	Innovative	Sustainable
1. Define and measure tourism value added					✓
2. Plan for rising carbon prices in airplane tickets and investment into public transport for use by tourists visiting Northern Ireland					✓
3. Undertake studies to understand and adapt to the tangible consequences of climate change for hospitality and leisure businesses					✓
4. Continue measuring the economic impact of tourism in NI			✓		
5. Put digital and experiences at the core of its tourism offer to stay competitive at an international level	✓			✓	
6. Leverage the power of business tourism and large-scale business events to position NI as a globally-recognised world-class tech destination	✓	✓		✓	
7. Monitor the social impact of tourism on local populations on an ongoing basis			✓		
8. Strengthen the attractiveness of tourism jobs and retain employees in the sector	✓		✓		
9. Rethink training programs to be aligned with the needs of companies and destinations	✓	✓	✓	✓	
10. Monitor and redirect tourism flows	✓			✓	✓
11. Monitor housing prices around tourism destinations			✓		
12. Pilot regulations for short stays rents and digital platforms in specific locations				✓	✓

Appendix #2: Benchmark of small island destinations – initiatives to mitigate their airplane dependency

Location	Commitments
Balearic Islands	<p>The Balearic Islands have increased their emphasis on a less-seasonal tourist offering in recent years and have introduced a sustainable tourism tax which by 2022 had funded 46 local conservation projects including the restoration of remote mountain lodges and protecting the Posidonia seagrass.¹⁵⁶ €104 million in taxes were raised in 2019 by this initiative and by 2021, a further €270 million had been raised.¹⁵⁷</p> <p>In 2022, the Islands also invested €55 million into a sustainable tourism initiative, whereby:</p> <ul style="list-style-type: none"> Hotels across the Islands will be required to suspend their use of miniature toiletries which are considered single-use Showers, baths, sinks and other facilities will need to install water-saving devices, and toilets will specifically be required to have double-push buttons Hotels will be required to limit their use of paper and plastics through methods such as swapping printed leaflets for digital QR codes Hotels and other tourism businesses, such as bars, will have to optimise electric usage, make use of rainwater, and switch oil boilers for gas or a natural energy source <p>How well hotels adapt to the new sustainable approach will be reflected in a rating — a new system that will be implemented to show which properties are embracing a more sustainable approach to operating, and which aren't.</p> <p>Additionally, in 2021 the four islands outlawed the sales of single-use items such as plastic cutlery, coffee capsules, cotton buds and disposable razors.¹⁵⁸</p>
Maldives	<p>With a net-zero by 2030 target¹⁵⁹, the Maldives demonstrates its commitment to sustainability through the following initiatives:</p> <ul style="list-style-type: none"> Ban on the production and sales of single-use plastics effective from 1st June 2022¹⁶⁰ On-site waste processing facility that recycles around 90% of the Soneva Resorts' plastic, aluminium and glass waste Solar energy installations – in 2018, Kudadoo Maldives Private Island became the first resort in the country to be fully solar-powered, with almost 1,000 solar panels that cover the rooftop of "The Retreat" (a hub for dining, wellness and retail) Zero-Food-Mile dining – guests dining at the Zero restaurant at Sun Island Resort & Spa are promised a nearly zero-food-mile dining experience, with an emphasis on produce plucked from the hotel garden and fishermen-fresh seafood Guest conservation programmes – guests as the Six Senses Laamu can sign up for a variety of marine conservation activities including reef clean-ups, weekly conservation lectures, marine biologist-guided snorkelling outings and a junior marine biology programme for children¹⁶¹
Mauritius	<p>In 2020, the Mauritius Government set up a \$12million SME fund to encourage the "Made in Mauritius" brand and increase the prevalence of locally-produced goods to be incorporated into the tourism offering.¹⁶²</p> <p>The Mauritius Tourism Strategic Plan 2018 – 2021 sets the vision that Mauritius becomes "A leading and sustainable island destination". To achieve the vision, seven missions are defined, two of which target improving sustainability and innovation of the tourism industry:</p> <ul style="list-style-type: none"> To broaden the tourism product portfolio to include eco-tourism, spa and wellness tourism, cruise tourism, cultural tourism, business tourism and sporting events; To mainstream sustainable practices in tourism development. <p>Mauritius has been able to demonstrate its success in fulfilling its sustainability objectives through the following initiatives:</p> <ul style="list-style-type: none"> Solar-operated cruise experiences Sustainable local wine and olive oil experiences Unique bike tour guided by local students in Caye Caulker

¹⁵⁶ The best of Spain's Balearic Islands, off season - Lonely Planet

¹⁵⁷ Taxing tourists is helping the Balearic Islands give back to sustainable initiatives | Euronews

¹⁵⁸ Balearic Islands sustainability: New tourism laws for holidays explained

¹⁵⁹ Maldives: Towards a Sustainable Net-Zero Future (worldbank.org)

¹⁶⁰ The Maldives bans production and sales of single-use plastics effective from 1st June 2022 – Ministry of Environment, Climate Change and Technology

¹⁶¹ These Maldives resorts are leading the charge on sustainability | CNN

¹⁶² Focus on Mauritius: Promoting Sustainability Through Perseverance And Policy - Forbes Africa

	<ul style="list-style-type: none"> Local food & wine tasting tour¹⁶³ <p>Mauritius is committed to acquiring “Green Destination” status by 2030 and aims to achieve this by:</p> <ol style="list-style-type: none"> Reducing the “footprint” i.e. negative impact such as resource overuse and carbon emissions Increasing the “handprint” i.e. positive impact such as community development, cultural preservation, ecosystem quality and authentic experiences¹⁶⁴
<p>Republic of Fiji</p>	<p>Tourism Fiji’s Corporate Plan 2022-2024 sets out how the island will support an inclusive economic recovery as well as promote environmental stewardship. The six strategic principles are as follows:</p> <ol style="list-style-type: none"> Sustainably Growing Demand Supporting Experience Development Focusing on Sustainability Shaping Perceptions of Fiji Promoting the Value of Tourism to Fiji Enabling an Efficient, High-performing and Innovative Team <p>As part of the “Focusing on Sustainability” principle, Tourism Fiji has committed to:</p> <ul style="list-style-type: none"> Working with the Ministry for Commerce, Trade, Tourism and Transport to pursue certification as a sustainable destination through the Global Sustainable Tourism Council Calculating and publishing the island’s carbon footprint as well as establishing internal standards for purchasing and procurement Developing internal programmes to ensure their events are free of single-use plastics Appointing a full-time sustainability officer to audit and highlight sustainability measures¹⁶⁵ <p>Fiji created a brand “Fijan made- buy Fijan campaign” to promote local production and lessen carbon footprint due to aircraft imported products¹⁶⁶</p> <p>The Fiji National Provident Fund is working to encourage higher take-up of local food and beverage products to reduce import dependence.¹⁶⁷ Fiji’s Environment and Climate Adaption Levy is a budgetary policy of a 10% levy that reinforces Government’s commitment for all Fijians the right to a clean environment. The levy is charged for prescribed visitor services to support environmental and climate adaption projects¹⁶⁸</p>
<p>Hawaii</p>	<p>The Hawaii Tourism Authority’s 2020-2025 Strategic Plan focuses on four “pillars”:</p> <ol style="list-style-type: none"> Natural Resources - Respect for Our Natural & Cultural Resources Hawaiian Culture - Support Native Hawaiian Culture & Community Community - Ensure Tourism & Communities Enrich Each Other Brand Marketing - Strengthen Tourism’s Contributions <p>The commitments of the “Natural Resources” pillar are underpinned by six programmatic actions, including:</p> <ul style="list-style-type: none"> Purchasing local products and locally grown food whenever appropriate to reduce dependence on imports and increase local economic activity Conducting a collaborative environmental sustainability program with natural resource partners to mitigate visitor impacts and support responsible tourism initiatives Contracting to provide sustainable tourism certification and industry training modules to partners¹⁶⁹ <p>In 2020, the Department of Land and Natural Resources conducted a re-think on how to run the famous Diamond Head tourist attraction, which in previous years had come litter-strewn and was the subject of visitors’ irritation.</p> <ul style="list-style-type: none"> During the pandemic, the Department added traffic lights on either side of Kahala Tunnel, which visitors must drive and walk through to enter and exit the park, essentially turning the tunnel into an alternating one-way access route. The pedestrian walkway at the entrance was more than doubled to encourage people to walk in rather than drive. The parking vendor created a designated location for ride-share drivers to drop off and pick up passengers.¹⁷⁰

¹⁶³ Making Mauritius a Leading and Sustainable Island Destination

¹⁶⁴ Sustainable Island Mauritius - CSCP GmbH

¹⁶⁵ Tourism Fiji Corporate Plan 2022-2024

¹⁶⁶ Sustainable Tourism Product Development Opportunities in the Pacific Islands (e-unwto.org)

¹⁶⁷ Sustainable Tourism Product Development Opportunities in the Pacific Islands (e-unwto.org)

¹⁶⁸ Sustainable Tourism Product Development Opportunities in the Pacific Islands (e-unwto.org)

¹⁶⁹ Hawaii Tourism Authority - Strategy Plan 2020-2025

¹⁷⁰ In Hawaii, Reimagining Tourism for a Post-Pandemic World - The New York Times (nytimes.com)

Appendix #3: Tourism Central Budget Allocation across EU Countries (2018)

The table below demonstrates the central budget allocations to tourism across a range of EU countries in 2018, and is ordered from the largest budget to smallest. The figures include the central budget allocation to the relevant national tourism agency/board, designated governmental tourism department (where applicable), as well as any additional disclosed EU funding. Northern Ireland figures have also been included as a baseline.

Location	Central Government budget allocation to tourism (€,000s) - 2018 ¹⁷¹	Population (million) - 2018 ¹⁷²	Central Government budget allocation to tourism per head (€)
Northern Ireland¹⁷³	42,842	1.9 ¹⁷⁴	2.25
France	5,000,000	67.12	74.49
Spain	336,000	46.83	7.17
Portugal	288,000	10.28	28.02
Austria	69,800	8.85	7.89
Belgium	69,600	11.43	6.09
Germany	68,700	82.93	0.83
Greece	63,700	10.73	5.94
Czech Republic	38,200	10.63	3.59
Luxembourg	19,558	0.61	32.06
Finland	16,000	5.52	2.9
Iceland	14,815	0.34	43.57
Slovenia	13,500	2.08	6.49
Poland	12,996	37.97	0.34
Slovakia	11,600	5.45	2.13
Sweden	9,366	10.19	0.92
Netherlands	8,900	17.24	0.52
Lithuania	4,300	2.79	1.54
Latvia	2,600	1.92	1.35

¹⁷¹ OECD Tourism Trends and Policies 2020 | OECD Tourism Trends and Policies | OECD iLibrary

¹⁷² Oxford Economics Global Data Workstation

¹⁷³ Provided by DfE

¹⁷⁴ 2020 mid-year Population Estimates for Northern Ireland, NISRA, 2020, Statistical Bulletin - 2019 Mid-year Population Estimates for Northern Ireland (nisra.gov.uk)

Local Government District	% share of tourism jobs per total employment
Northern Ireland	
Antrim and Newtownabbey	6
Ards and North Down	14
Armagh City, Banbridge and Craigavon	6
Belfast	8
Causeway Coast and Glens	12
Derry City and Strabane	9
Fermanagh and Omagh	9
Lisburn and Castlereagh	7
Mid and East Antrim	10
Mid Ulster	6
Newry, Mourne and Down	9
Republic of Ireland	
Carlow	10
Cavan	9
Clare	11
Cork County	10
Donegal	13
Dublin City	10
Dun Laoghaire - Rathdown	10
Fingal	10
Galway County	10
Kerry	18
Kildare	8
Kilkenny	11
Laois	10
Leitrim	11
Limerick	9
Longford	8
Louth	9
Mayo	11
Meath	8
Monaghan	8
Offaly	9
Roscommon	8
Sligo	11
South Dublin	10
Tipperary	8
Waterford	11
Westmeath	10
Wexford	12
Wicklow	10