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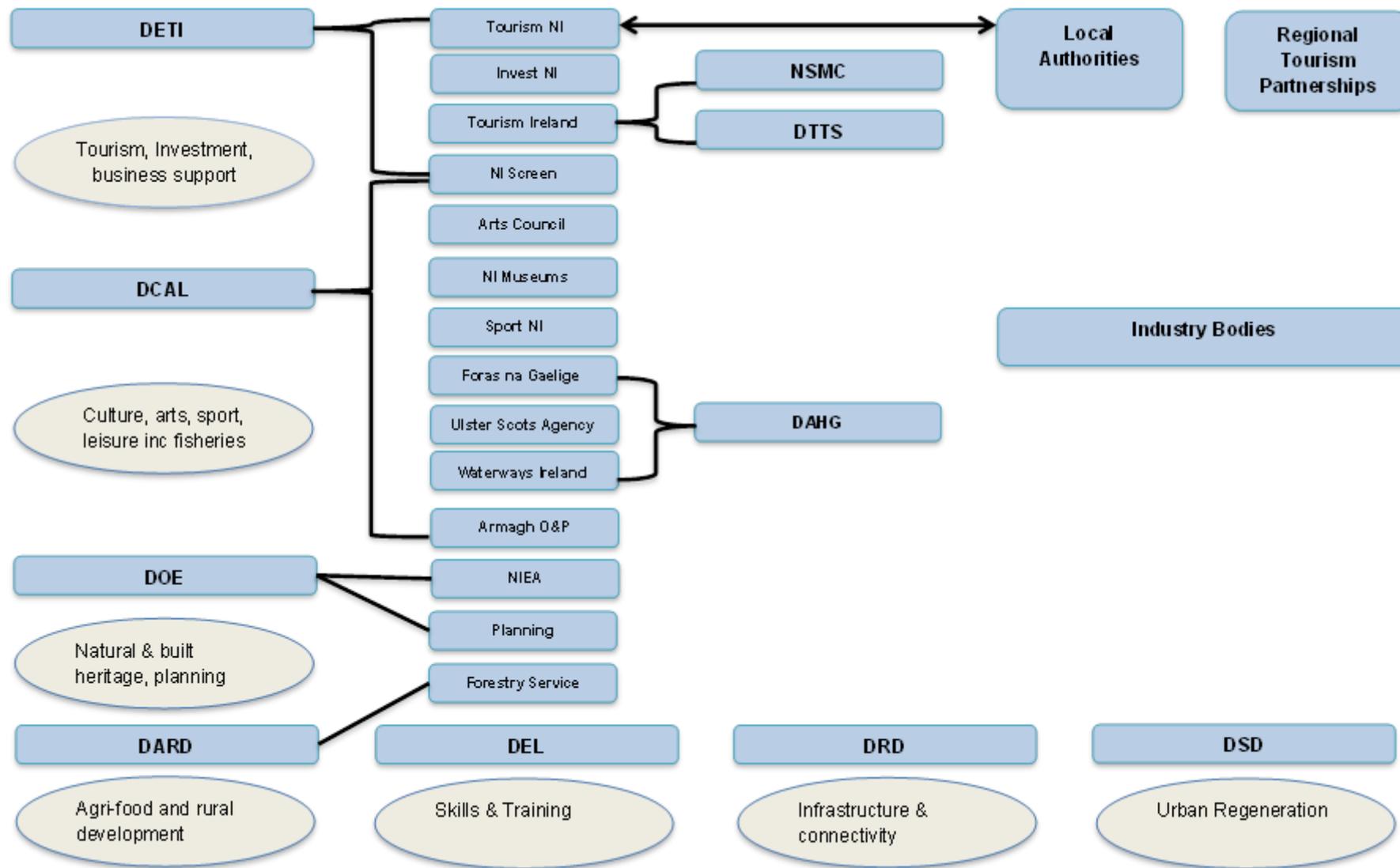
Northern Ireland Tourism: structures

1 Introduction

The following paper, which has been prepared for the Enterprise, Trade and Investment Committee, seeks to:

- Outline the government structures which impact the development of tourism in Northern Ireland. In this respect it provides a brief overview of the roles of Tourism Northern Ireland (Tourism NI) and Tourism Ireland. It also examines a number of other government functions which interact with tourism development, providing a brief overview of the work of Departments and their arms-length bodies in these areas. In addition the role of Councils (in light of recently devolved powers), Regional Tourism Partnerships and industry associations is outlined, as well as the cross border interactions which impact on Northern Ireland's tourism development. Figure 1 provides an illustrative summary of Northern Ireland's tourism structures.
- Provide a brief overview of changes to these structures resulting from the Hunter Review and the anticipated realignment of Northern Ireland's Government Departments.

Figure 1: Northern Ireland's tourism structures



2 Tourism promotion bodies

Tourism is the responsibility of the Department for Enterprise, Trade and Investment at Northern Ireland Executive level. The Department is the sponsor of Tourism Northern Ireland and co-sponsor (along with the Department of Transport, Tourism and Sport in the Republic of Ireland) of Tourism Ireland.

This section looks at the roles and responsibilities of these agencies.

2.1 Tourism Northern Ireland

2.1a Background

Tourism Northern Ireland (the trading name of the Northern Ireland Tourist Board) is a non-departmental body of the Department of Enterprise, Trade and Investment. The Department determines the strategic framework within which Tourism NI operates.

The agency was established under the Development of Tourist Traffic Act (NI) 1948, with its continuation affirmed by the Tourism (Northern Ireland) Order 1992. This order set out the functions of the agency as follows:

- To encourage tourism;
- To encourage the provision and improvement of tourist accommodation and tourist amenities;
- To advise the Department generally on the formulation and implementation of its policy in relation to the development of tourism; and
- Such other functions as are conferred on to it by the Order or any other statutory provision.¹

Tourism Northern Ireland's promotional work is focussed on domestic tourism and the Republic of Ireland. Tourism Ireland is responsible for promoting Northern Ireland in Great Britain and Overseas markets.

Over the timeframe of its current corporate plan (2011 to 2015) Tourism Northern Ireland is working to:

- Unlock the potential of Northern Ireland tourism, by raising the awareness of the economic importance of tourism and working with strategic partners.
- Build the tourism product, by funding the development of quality tourism assets.
- Develop a quality visitor experience, by supporting the development of '*a high quality tourism industry through quality programmes which are based on visitor needs*'.

¹ The Tourism (Northern Ireland) Order 1992 s4 <http://www.legislation.gov.uk/nisi/1992/235/article/4>

- Promote the destination by ‘*delivering a compelling marketing communications programme*’.
- Be an excellent organisation by delivering quality services and embedding business improvement into its operations.²

2.1b Responsibilities

Tourism NI’s work falls into four broad areas:

- **Research and intelligence** – Tourism NI works with the Northern Ireland Statistics Agency to produce a range of statistical reports outlining Northern Ireland’s tourism performance. This includes annual and quarterly reports, domestic, overseas, and RoI tourism performance, accommodation occupancy and stock, tourism employment statistics, the tourism industry barometer, and Visitor Attraction Survey reports. It also seeks to provide ‘*up-to-date intelligence*’ to Northern Ireland’s tourism industry. This includes the ‘Future Trends’ series which explores potential trends in tourism and how these impact Northern Ireland.³
- **Business support** – Tourism NI offers advice and funding to Northern Ireland’s tourism industry. In its advisory role the work of the agency includes accommodation start-up advice, advice on the legal and licensing considerations tourist businesses are required to meet, advice on how to grow a tourism business and advice on developing tourism products. It also provides accommodation certification, quality assures tourism products, promotes and develops major events, and works to develop business tourism. From a funding perspective the agency currently offers funding for events only (see Box 1). It has previously offered capital funding (Tourism Development Scheme 2008-2011) and Tourism Innovation Funding (closed due to budgetary constraints).⁴
- **Destination development** – Tourism NI supports tourism providers and industry in nine ‘*key destinations*’ – Belfast City & Greater Belfast, Derry/Londonderry, Armagh, the Mourne, Strangford Lough, Causeway Coast & Glens, Lough Neagh, Fermanagh Lakelands, and Tyrone & the Sperrins – to develop destination plans. This includes providing research and information, as well as promotional support⁵; and
- **Industry events** – Tourism NI events include a series of training courses, events, master-classes, business insights, road shows and workshops that run throughout the year.⁶

² Tourism Northern Ireland, Corporate Plan 2011-2015

<http://www.tourismni.com/Portals/2/SharePointDocs/2187/101943%20NITB%20Corporate%20Plan%202011-2015%20LR%20WEB.pdf>

³ Tourism Northern Ireland Research and Intelligence <http://www.tourismni.com/ResearchIntelligence.aspx>

⁴ Tourism Northern Ireland, Business Support <http://www.tourismni.com/BusinessSupport.aspx>

⁵ Tourism Northern Ireland, Destination Development <http://www.tourismni.com/Destinations.aspx>

⁶ Tourism Northern Ireland, Industry Events <http://www.tourismni.com/IndustryEvents.aspx>

Box 1 – Tourism NI Events Programme 2016/17: three funding streams which provide funding from 1 April 2016 to the 31 March 2017:

- The International Events Fund 2016/17: funds ‘event[s] that attracts out of state visitors to Northern Ireland, where the event has played the key / vital role in attracting them to visit’. To qualify events must have: total visitor numbers greater than 5,000; an overall budget of £150,000; and an aimed return on investment of 5:1. Funding requests must be in excess of £30,000.⁷
- The National Tourism Events Sponsorship Scheme: offers financial support to events which ‘will showcase Northern Ireland’s regions and destinations allowing our visitors to get closer to our authentic people, places and personality through experiencing the real Northern Ireland’. Eligible events must have: visitor numbers in excess of 1,000; a minimum income of £50,000; and a minimum expenditure of £50,000. Sponsorship from £6,000 to £30,000 is available.⁸
- The Year of Food and Drink Tourism Events Scheme offers financial support to events which ‘showcase authentic Northern Ireland food and drink’ and ‘promote Northern Ireland Year of Food and Drink 2016’. Such events must have: total visitor numbers in excess of 1,000: a minimum income of £30,000; and total expenditure in excess of £30,000. Support of between £3,000 and £10,000 is available.⁹

2.2 Tourism Ireland

2.2a Background

Tourism Ireland Ltd was formed after the Belfast Agreement of Good Friday 1998, Strand two, paragraph nine of which states:

As part of the work programme, the [North/South Ministerial] Council will identify and agree at least 6 matters for co-operation and implementation in each of the following categories:

(I) Matters where existing bodies will be the appropriate mechanisms for co-operation in each separate jurisdiction;

(ii) Matters where the co-operation will take place through agreed implementation bodies on a cross-border or all-island level.

⁷ Tourism Northern Ireland, Guidelines – International Events Fund 2016/17

http://www.tourismni.com/Portals/2/205883%20TNI%20EVENT%20FUNDING%20INTERNATIONAL_2015_WEB.pdf

⁸ Tourism Northern Ireland, Guidelines National Tourism Events Sponsorship Scheme 2016/17

http://www.tourismni.com/Portals/2/%282%29205883%20NITB%20EVENT%20FUNDING%20LOCAL_2015_WEB.pdf

⁹ Tourism Northern Ireland, Guidelines Year of food and Drink Tourism Events Scheme

http://www.tourismni.com/Portals/2/%283%29205883%20NITB%20EVENT%20FUNDING%20YOFAD_2015_WEB.pdf

The Annex attached to the Strand outlines 12 areas which may be considered as matters for cooperation. Tourism is included as one such area of cooperation.¹⁰

Tourism Ireland Ltd was established by the Northern Ireland Executive and the Republic of Ireland Government, under the auspices of the North South Ministerial Council (NSMC). It was incorporated on 11 December. The company takes policy direction from the NSMC and works closely with Fáilte Ireland and Tourism Northern Ireland.¹¹

The company is governed by its Memorandum and Articles of Association and by the Financial Memorandum approved by the NSMC and prepares detailed three-year Corporate and one year Operating Plans to guide its activities.

Tourism Ireland receives the bulk of its income from the Republic of Ireland Government and the Northern Ireland Executive. This totalled €53.885m in 2015, composed of €13.135m from the Northern Ireland Executive and €40.750m from the Republic of Ireland Government. This represented a decrease in funding on 2014. Overall funding fell from €58.029m (a decrease of approximately 7% year on year) in 2014. Funding provided by the Northern Ireland Executive fell from €15.506m in 2014 (a decrease of approximately 15% year on year). Funding provided by the Republic of Ireland Government fell from €42.523m in 2014 (a decrease of approximately 4% year on year).¹²

2.2b Responsibilities

Tourism Ireland is responsible for the marketing of the island of Ireland overseas as a holiday and business tourism destination. The company is active in 20 countries globally, reaching an estimated 200 million potential visitors each year. Great Britain, the USA, Germany and France have been identified as priority markets as these markets *'deliver the majority of our overseas visitors'*. Promotional campaigns are also rolled out in markets including Northern and Southern Europe, Australia, New Zealand, South Africa, Middle East, China, India, Russia and Brazil.

Key activities carried out by the organisation include:

- **Overseas publicity** – the organisation works with overseas lifestyle and special interest media as part of its promotional programme;
- **Overseas promotional opportunities for industry partners** – Tourism Ireland provides industry partners with an opportunity to promote their business overseas alongside the tourist organisation's own activities;

¹⁰ The Agreement Strand 2

https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/136652/agreement.pdf (accessed 02 June 2015)

¹¹ Tourism Ireland, Annual Report 2013 <https://www.tourismireland.com/TourismIreland/media/Tourism-Ireland/About%20Us/Corporate%20Publications/Tourism-Ireland-ANNUAL-REPORT-2013.pdf?ext=.pdf>

¹² Tourism Ireland Business Plan 2015 Provided by Tourism Ireland 05 June 2015

- **Working with the travel trade** – Tourism Ireland works with the international travel trade to *‘help influence overseas consumers to visit the island of Ireland’*. Partners in this area include traditional and online tour operators, travel agents - including leading consortia, and online intermediaries and websites popular with potential leisure and business travellers.
- **Air and sea services** – Tourism Ireland works *‘with air and sea carriers, ports and airports, and other partners to drive demand for new and existing air and sea routes and to case-make for the introduction of strategically important new inbound services’*; and
- **Sharing market knowledge** – The company shares *‘insights on global tourism trends and the changing needs of overseas consumers’* with the NI and RoI tourist boards as well as other industry partners.¹³

3 Northern Ireland Executive Departments and Arms-length bodies

The following section looks at Northern Ireland Executive Departments that interact with the development of tourism in Northern Ireland. Seven Departments have been identified as having functions that overlap and interact with Northern Ireland’s tourism product.

3.1 Department of Enterprise, Trade and Development

As noted above the Department of Enterprise, Trade and Development (DETI) is the Northern Ireland Executive Department responsible for the strategic development of tourism within Northern Ireland. It has overarching responsibility for the delivery of the tourism targets set out in the Programme for Government, namely to:

*Increase visitor numbers to 4.2 million and tourist revenue to £676 million by December 2014.*¹⁴

DETI is also the lead department in taking forward the recommendations of the *‘Independent Review of Northern Ireland Tourist Board and Wider Tourism Structures’* (the Hunter Review), including the development of a new tourism strategy for Northern Ireland.

As already explored above, the Department sponsors and sets the strategic direction of Tourism NI. It is also co-sponsor of Tourism Ireland.

In addition to its ‘direct’ tourism responsibilities, DETI is also the sponsor of Invest NI. Following on from the Hunter Review, Invest NI is to have an increased role in developing Northern Ireland’s tourism offering. The Review made a number of recommendations to encourage closer working relationships between Invest NI and Tourism NI including economic brand development and the sharing of back office

¹³Tourism Ireland, About Us <https://www.tourismireland.com/About-Us/What-we-do>

¹⁴ Northern Ireland, Programme for Government 2011-15 <http://www.northernireland.gov.uk/pfg-2011-2015-final-report.pdf>

facilities. These recommendations have been accepted by the Department, although total acceptance is in some cases subject to a business case.¹⁵

Through Invest NI, DETI is co-sponsor (with DCAL) of NI Screen, the agency responsible for development of the film, television and digital content industry in Northern Ireland. Whilst the body's principal purpose is the development of this industry within Northern Ireland, its work in this area has become a significant selling point for tourism in the region.¹⁶

Invest NI, in collaboration with local businesses, supports the NI Connections web platform. The purpose of this not-for-profit project is to showcase Northern Ireland to the diaspora. At the launch of the project in 2012 the ETI Minister stated:

*A wide range of organisations in Northern Ireland consider the diaspora community a key audience, resource or market and are already working to engage with this group as a means of raising awareness and promoting Northern Ireland around the world. By creating this new, not-for-profit organisation to take the strategic lead and determine the best method for interacting with the diaspora community we can ensure all interactions with this target group are strategic, co-ordinated, timely and effective.*¹⁷

3.2 Department of Culture, Arts and Leisure

The Department of Culture, Arts and Leisure (DCAL) is 'responsible for arts and creativity, museums, libraries, sport, inland waterways and inland fisheries, linguistic diversity, archives, and for advising on National Lottery distribution'¹⁸.

DCAL's Inland Fisheries Group is responsible for Northern Ireland's public angling estate and issues angling licences and permits.¹⁹

DCAL is the sponsor, or co-sponsor of a range of arms-length bodies which work in areas that impact Northern Ireland's tourism product:

- NI Screen – as noted above DCAL is the co-sponsor of NI Screen;
- The Arts Council – DCAL is the sponsor body for the Arts Council NI, the funding and development agency for the Arts in Northern Ireland. The agency's 'Ambitions for the Arts: A Five Year Plan for the Arts in Northern Ireland 2013-18' strategy highlights the interactions with tourism, noting that the arts 'create jobs, promote

¹⁵ Department of Enterprise, trade and Investment, Independent Review of Northern Ireland Tourist Board and wider Tourism Structures – Outcome of Recommendations (January 2015)

<https://www.detini.gov.uk/sites/default/files/publications/deti/outcome-of-recommendations-from-review-of-tourism-in-ni.pdf>

¹⁶ Northern Ireland Screen, About Us <http://www.northernirelandscreen.co.uk/sections/76/about-us.aspx>

¹⁷ Tourism NI, Website launched for Northern Ireland diaspora

<http://www.tourismni.com/NewsMedia/LatestNews/tabid/180/EntryId/219/Website-Launched-For-Northern-Ireland-Diaspora.aspx>

¹⁸ Department of Culture, Arts and Leisure, About Us http://www.dcalni.gov.uk/about_us.htm

¹⁹ NI Direct, angling licence and permits <http://www.nidirect.gov.uk/index/information-and-services/leisure-home-and-community/leisure-and-recreation/outdoor-recreation/angling/game-and-coarse-angling/angling-licences-and-permits.htm>

tourism, foster innovation, nurture community development and help build peace in our fractured society. Moreover the strategy identifies partnership working between the Arts Council and Tourism NI in the development of cultural tourism as a means of placing the arts at the centre of *'social, economic and creative life'* in Northern Ireland.²⁰

- National Museums Northern Ireland's portfolio comprises of: the Ulster Museum; the Ulster Folk and Transport Museum; the Ulster American Folk Park; and formerly the Armagh County Museum (now overseen by Armagh City, Banbridge and Craigavon Borough Council). The body describes these assets as *'Northern Ireland's foremost cultural, educational and tourism destinations'*. Amongst its responsibilities the organisation is required to play a vital role in tourism as a key partner of Tourism Northern Ireland and Tourism Ireland.²¹
- DCAL is the co-sponsor (alongside the Department of Arts, Heritage and Gaeltacht of two language arms-length bodies – Foras na Gaelige and the Ulster Scots Agency. DCAL's Irish Language Strategy 2015-2035 highlights the interplay between Irish language promotion and the development of Northern Ireland's cultural tourism stating *'benefits and opportunities arising from cultural tourism in the context of the Irish language cultural economy need to be more effectively promoted'*. Objective six, of DCAL's Ulster-Scots Language, Heritage and Culture Strategy 2015-2035, seeks to *'increase the sustainable capacity of the Ulster-Scots community sector by promoting cultural and heritage based tourism'*.²²
- Sport Northern Ireland has a role to play in the development of activity tourism. *'Sport matters: a culture of lifelong enjoyment and success in sport - The Northern Ireland Strategy for Sport & Physical Recreation 2009 - 2019'* highlights activity tourism's contribution to the Northern Ireland economy (£30m, based on 2003 data) and commits the body to reviewing and updating *'relevant public policy frameworks to enable access to, and sustainable use of, publicly-owned land in NI for sport, physical recreation and activity tourism'* over the course of the strategy.²³
- Waterways Ireland – Waterways Ireland is a North/South Implementation Body, it is sponsored by DCAL along with the Department of Arts, Heritage and the Gaeltacht in the Republic of Ireland. The organisation's statutory function is *'the management, maintenance, development and restoration of inland waterways throughout the island, principally for recreational purposes'*. It works in partnership with tourist promotions agencies across the island in the delivery of its business objectives.

²⁰ Department of Culture, Arts and Leisure Ambitions for the Arts: A Five Year Plan for the Arts in Northern Ireland 2013-18
<http://www.dcalni.gov.uk/ambitions-for-the-arts-5-year-strategy.pdf>

²¹ Northern Ireland Museums, Annual Report and Accounts 2014 *'Northern Ireland's foremost cultural, educational and tourism destinations'*

²² The Department of Culture, Arts and Leisure, Strategy to Enhance and Protect the Development of the Irish Language 2015-2035
http://www.dcalni.gov.uk/strategy_to_enhance_and_develop_the_ulster_scots_language_heritage_and_culture_2015-2035.pdf

²³ Sport Northern Ireland

- The Armagh Observatory and Planetarium is part of the Irish Astronomy Trail, a heritage and cultural tourism initiative that links astronomy centres across the island of Ireland.²⁴

3.3 Department for Employment and Learning

One of the Department for Employment and Learning's (DEL) key areas of responsibility are the *'enhancing the provision of learning and skills, including entrepreneurship, enterprise, management and leadership'*.²⁵

In 2009 the Department published a *'Future Skills Action plan for Hospitality and Tourism'*. The Action Plan had three objectives:

- To coordinate existing resources and activities within the sector to meet current and future skills needs;
- To advise, design, develop, test, trial and evaluate new interventions which are able to meet existing and future skills needs within the sector; and
- To act as a 'Champion' for the sector.²⁶

In meeting these objectives, the Action Plan sought to address a number of issues in three thematic areas – skills provision, sector attractiveness, and coordination and communication. The issues addressed were the need:

- To improve the management and leadership skills of the hospitality and tourism sector;
- To increase the number of chefs coming into the industry;
- To increase the number of people in the workforce with customer service qualifications;
- To encourage more people into the sector;
- To coordinate new and existing work with work being taken forward with others, and to communicate actions to stakeholders.²⁷

On skills, the Hunter Review found that *'substantial progress'* had been achieved via the action plan. It concluded that, as five years had passed since the development of the Action Plan, *'there would be merit in reviewing the priority areas in the Action Plan through the development of a local sector skills strategy for tourism'* and recommended

²⁴ Armagh Planetarium and Observatory, Business Plan 2014-15

<http://www.armaghplanet.com/pdf/Administration/AOP%20Business%20Plan%20201415%20v1.0.pdf>

²⁵ Department of Employment and Learning, About Us <http://www.delni.gov.uk/index/about-the-dept.htm>

²⁶ Department of Employment and Learning Future Skills Action Plan for Hospitality and Tourism (November 2009)

http://www.delni.gov.uk/future_skills_action_plan_with_grid_attached.pdf

²⁷ *Ibid*

that a review of the sector skills be initiated by DEL in conjunction with Tourism NI and People 1st, with industry involvement.²⁸

3.4 Department of the Environment

The Department of the Environment's aim is to:

...protect and improve the environment, promote well-being, and support a sustainable economy, and strong, effective local government.

Amongst the Department's functions the following interact with Northern Ireland's tourism product.

- Planning and environmental policy and legislation; and
- The protection, conservation and promotion of the natural environment and built heritage.

With regard to planning, Planning Policy Statement (PPS) 16 'Tourism' sets out:

... the Department's planning policies for tourism development that are sustainable, beneficial to the local economy and sensitive to the value of our tourism assets. It seeks to manage the provision of sustainable and high quality tourism developments in appropriate locations within the built and natural environment. It embodies the Government's commitment to sustainable development and to the conservation of biodiversity.

DOE's planning functions are undergoing a period of transition resulting from the reform of local government. The new planning system involves a move away from the existing suite of PPS to a single Strategic Planning Policy Statement (SPPS). The SPPS consolidates the suite of PPSs into one document and provides the overarching planning principles from which councils develop their own planning policies within their new local development plans (LDPs). However, a transitional period is currently in operation until councils develop their LDPs. During this time the new councils will apply the policy of some of the old PPSs together (including PPS 16) with the new SPPS when determining planning decisions.²⁹

The Northern Ireland Environment Agency (NIEA) is responsible for the protection of the region's environment and built heritage. The Agency's Corporate Plan 2012-2015 highlights the interaction between their in these two areas with tourism development. On the environment it notes that:

²⁸Department of Enterprise, trade and Investment, Independent Review of Northern Ireland Tourist Board and wider Tourism Structures (June 2014) <https://www.detini.gov.uk/sites/default/files/publications/deti/outcome-of-recommendations-from-review-of-tourism-in-ni.pdf> <https://www.detini.gov.uk/sites/default/files/publications/deti/deti-tourism-14-review-report.pdf>

²⁹ Department of the Environment, Strategic Planning Policy Statement for Northern Ireland (SPPS) (September 2015) http://www.planningni.gov.uk/index/policy/spps_28_september_2015-3.pdf

An actively regulated and well managed environment provides a significant direct economic benefit through employment and tourist income.³⁰

On built heritage it states:

Over recent years the built heritage has become recognised both as a means of understanding our past and as an integral part of Northern Ireland's cultural tourism product which will play a central role in the province's economic recovery.³¹

3.5 Department of Agriculture and Rural Development

The Department of Agriculture and Rural Development's (DARD) functions interact with tourism in three main areas: the Rural Development Programme; food; and recreation within Northern Ireland's countryside and forests.

DARD was the managing body for the Rural Development Programme 2007-13. This included 'Axis 3.3' 'Encouragement of Tourism Activities' which sought to maximise opportunities for tourism development. Through this scheme 251 tourism projects were supported; with a total spend of £15.4m.³²

The interaction between the development of Northern Ireland's food industry and tourism is a feature of 'Going for Growth: A Strategic Action Plan in support of the Northern Ireland agri-food industry'. The action plan states:

With our products attracting a number of national and international food awards and recognition for their provenance and quality, there is potential to build a stronger alliance between food and tourism, leveraging the unique qualities of our landscape, rich history, tradition and culture in marketing produce and maximising the contribution of high quality wholesome and artisan products to enhance the visitor experience. Food is increasingly important in Tourism Ireland's global marketing of the island.³³

DARD's arms-length body, the Northern Ireland Forest Service published a Recreation Strategy in 2009. The Strategy, which set out actions over the period 2009 to 2013 sought to ensure Northern Ireland's forests became:

... key venues for outdoor recreation and tourism, offering opportunities to appreciate and enjoy biodiversity, and a wide choice of activities for an increasing number of visitors. The strategy recognises that forests offer

³⁰ Northern Ireland Environment Agency, Corporate Plan 2012-2015

http://www.doeni.gov.uk/niea/niea_corporate_business_plan_2012-15.pdf

³¹ *Ibid*

³² Email correspondence with DARD 30 October 2015

³³ Agri-Food Board Going for Growth: A Strategic Action Plan in support of the Northern Ireland agri-food industry
<http://www.dardni.gov.uk/going-for-growth.pdf>

*significant opportunities to contribute to wider government objectives in tourism, rural development, sport, health and education.*³⁴

One aim of the strategy was to:

*Establish formal arrangements for regular engagement with NITB at both strategic and operational level to drive delivery of agreed collaborative projects in line with the Tourism Strategy NI.*³⁵

In 2011, Tourism NI and the Forest Service commissioned KPMG to produce an 'Assessment of the Existing and Potential Tourism Development Opportunities Available from Northern Ireland Forests'. This seeks to: 'increase the economic impact of forest related tourism'; 'encourage visitor experience and product development opportunities'; and 'promote and enable effective partnership working'.³⁶

3.6 Department of Social Development

The functions of the Department of Social Development interact with tourism in the area of urban regeneration; that is '*programmes that target social need through social, economic and physical regeneration of cities, towns and villages*'.

The department's urban regeneration functions include:

- 'Improving places' through comprehensive development schemes the Department works to regenerate areas of derelict or under-used land and/or buildings. The Department has engaged public and private sector in such regeneration. A recent example of such work is the development of the Victoria Square site.³⁷ The department also engages in '*public realm and environmental improvement work*'. Such work includes: improving street lighting, widening foot paths for pedestrians; and providing public art.³⁸ In addition, the department is '*accountable for the Creating Shared Public Spaces theme of Peace III and expects to fulfil a similar role under Peace IV*'.³⁹
- 'Neighbourhood Renewal' has been a feature of the Department's policy since 2003. The policy seeks to improve neighbourhoods in the most deprived areas of Northern Ireland. Whilst the Department's Neighbourhood Renewal programme has not had an explicit tourism focus some elements of the programme have impacted tourism development. The final evaluation of the Neighbourhood Renewal Programme (2015) notes that the '*Tourism and Arts Ambassador project run through Enterprise*

³⁴ Forestry Service, Recreation Strategy 2009 to 2013 <http://www.dardni.gov.uk/recreation-strategy-2009.pdf>

³⁵ *Ibid*

³⁶ Tourism NI Assessment of the Existing and Potential Tourism Development Opportunities Available from Northern Ireland Forests'<http://www.tourismni.com/Portals/2/SharePointDocs/2403/Forest%20Study.pdf>

³⁷ Department of Social Develop Comprehensive Development Schemes <https://www.dsdni.gov.uk/articles/comprehensive-development-schemes>

³⁸ <https://www.dsdni.gov.uk/articles/public-realm-environmental-improvement>

³⁹ <https://www.dsdni.gov.uk/articles/eu-programmes>

*North West has also been aiding people in the area to gain employment within the leisure, transport and tourism sector’.*⁴⁰

- The Department is also responsible for the River Lagan between Stranmillis Weir and the Lagan Weir. The river is used by rowers, private boats and a tour operator providing a tour of the Titanic Quarter.⁴¹

3.7 Department for Regional Development

The Department for Regional Development is responsible for road improvement schemes, transport initiatives, public transport, active travel, and Northern Ireland’s air and sea ports. A number of Departmental strategic documents highlight the interaction between its work in these areas and the development of tourism in Northern Ireland. For example, 2011’s *‘Ensuring a sustainable transport future: a new approach to regional transportation’*, which aims to be a guide to *‘strategic transportation interventions beyond 2015’* states:

*Having a region where it is easier for people and goods to move around not only affects existing firms, but also the general quality of life for everyone living or visiting here; improving Northern Ireland’s attractiveness both as an investment and tourism location.*⁴²

A high level aim of this strategy is to support the growth of the economy. This is to be delivered through meeting a number of strategic objectives, including improving connections to key tourism sites. On this the document states:

*We live in an area with a significant cultural and historical heritage and proper access to key tourism sites is increasingly important for the economy. Unlike other businesses, tourist attractions cannot choose where they are located. We need to ensure that the roads successfully connect visitors to tourist attractions, and that the connecting public transport system is frequent, reliable and represents value for money.*⁴³

A further example is the Department’s *‘Northern Ireland Changing Gear: a bicycle strategy for Northern Ireland’*, published August 2015 which notes:

Northern Ireland is an excellent tourism and holiday destination. The Bicycle Strategy can assist in opening up the unique character of Northern Ireland by developing amenity routes, greenways and cross border routes.

⁴⁰ <https://www.dsdni.gov.uk/sites/default/files/publications/dsd/nr-evaluation-report-2015.pdf>

⁴¹ <https://www.dsdni.gov.uk/articles/about-river-lagan-and-weir>

⁴² Department of Regional Development *Ensuring a sustainable transport future: a new approach to regional transportation* (2011)
<https://www.drdni.gov.uk/sites/default/files/publications/drd/Ensuring%20a%20Sustainable%20Transport%20Future%20-%20A%20New%20Approach%20to%20Regional%20Transportation%20%28final%20version%2C%20April%202012%29.pdf>

⁴³ *Ibid*

*We want people to come to Northern Ireland and enjoy a good, high quality cycling experience.*⁴⁴

4 Councils

Since 1 April 2015 Northern Ireland Councils have been responsible for local tourism. The powers transferred to the Councils at this time were:

- Small scale tourism accommodation development;
- Providing business support including business start-up advice, training and delivery of customer care schemes; and
- Providing advice to developers on tourism related issues.

In addition, Councils now have a number of powers and functions which may be viewed as complimentary to tourism development within their localities:

- Planning – including local development plan functions and development control and enforcement.
- Local Economic Development – including the Start a Business Programme and Enterprise Shows, Youth Entrepreneurship, Social Entrepreneurship, Investing for Women, and Neighbourhood Renewal funding related to enterprise initiatives.

Councils will take over responsibility for an additional, potential complimentary set of functions in the form of Urban Regeneration and Community Development from the 1 April 2016. This includes: functions associated with physical development (such as environmental improvement schemes); area based regeneration (such as Neighbourhood Renewal); and some community development programmes for the voluntary and community sectors.⁴⁵ Table 1 provides a summary of the stage each council has reached in the Development of a tourism strategy⁴⁶.

Table 1: Tourism strategy development at Council Level

Council	Tourism Strategy	Timeline
Antrim and Newtownabbey Borough Council	In Development	The Council does not yet have a Tourism Strategy. The Council's emerging Community Plan will include the economic priorities and actions, including tourism, for the Borough for the short, medium and long term; the Community Plan will be available until next summer. To fill in the gap, the Council has agreed a short term tourism action plan for the current year.

⁴⁴ Department of Regional Development, Northern Ireland Changing Gear: a bicycle strategy for Northern Ireland' (August 2015) <https://www.drni.gov.uk/publications/bicycle-strategy-northern-ireland>

⁴⁵ The Department of the Environment, Powers agreed by the Executive to transfer to local councils in April 2015 http://www.doeni.gov.uk/powers_transferring-3.pdf

⁴⁶ Sourced from correspondence with Councils between 30 October 4 November – unless otherwise noted in table

Council	Tourism Strategy	Timeline
Ards and North Down Borough Council	Tourism Events Programme	Council board minutes reveal Council has approved a tourism events programme. ⁴⁷ Minutes also reveal the Shadow Council provided tourism events grant funding advertised Dec 2014, and is launching a second tranche of events funding November 2015. ⁴⁸
Armagh City, Banbridge and Craigavon Borough Council	In Development	Initial workshops for strategy development conducted with Council Members and Tourism NI. Wider consultation is imminent on Tourism Strategy and Action Plan (to incorporate an events plan). Anticipated completion date 31 March 2016
Belfast City Council	Yes	Covers the period 2015 to 2020. Strategy is available here .
Causeway Coast and Glens District Council	Yes	Published June 2015, 2015-2020, available here .
Derry City and Strabane District Council	In Development	Derry City And Strabane District Council is currently in the process of developing our Community Plan for the region. Tourism, Arts & Culture is one of 8 sectoral groups within the Community Planning process. To date a total of 4 public working group sessions to inform strategic priorities and actions for tourism, arts and culture have been held. Prior to these public consultation events other public information sessions were held to raise awareness of Community Planning. Following on from this consultation work is to begin on drafting individual strategies for specific key sectors, including tourism arts and culture through community planning.
Fermanagh and Omagh District Council	In Development	Consultation on strategy complete. Currently engaged in desktop study. A draft of the strategy is expected in early December 2015
Lisburn and Castlereagh District Council	Yes	An interim Tourism Development Action Plan has been produced covering the period 2015-17. The Council intends to follow this with a strategy for the years 2018-20
Mid and East Antrim Borough Council	In Development	Out for tender
Mid Ulster District Council	In Development	Half way through Strategy development, expecting completion in November or December. Planning a five year strategy focussing on Seamus Heaney, Outdoor Activities (Hubs), History and Heritage - Hill Of O'Neill's. Tourism NI agreed, consulting with stakeholders at present.
Newry, Mourne and Down District Council	In Development	The Council is currently tendering for a facilitator for their Tourism Strategy. The Council has produced a 'Economic Regeneration & Investment Strategy 2015-2020' which includes a Tourism Development and Marketing Events theme. The Council is also working under three legacy destination plans from the previous council - Destination Strangford Lough Plan for 2013-2018; Mourne Mountains & Ring of Gullion 2013-18; and Strangford Lough.

⁴⁷ Ards and North Down Council, Regeneration and Development Committee Minutes 16 April 2015 http://northdown.m-cloudapps.com/TROVEPROGS/TroveAMDocLink.aspx?IS=497695200/LI=North_Down_BC/ID=40/OS=44/DI=2411/PA=65/HL=2/DS=2411/LO=1/RW=1280/RH=1024/CD=24/VD=ANDBC/WV=7/ST=ae/AC=BB/FI=156/AM=1/HU=http:++www.ardsandnorthdown.gov.uk+about-the-council

⁴⁸ Ards and North Down Council, Regeneration and Development Committee Minutes 15 October 2015 http://northdown.m-cloudapps.com/TROVEPROGS/TroveAMDocLink.aspx?IS=497695200/LI=North_Down_BC/ID=40/OS=44/DI=2523/PA=270/HL=2/DS=2523/LO=1/RW=1280/RH=1024/CD=24/VD=ANDBC/WV=7/ST=ae/AC=BB/FI=156/AM=1/HU=http:++www.ardsandnorthdown.gov.uk+about-the-council

5 UK and cross border linkages

There are number of UK wide and cross-border linkages which impact Northern Ireland's tourism landscape.

Visit Britain was established under the Development of Tourism Act 1969. This act extends the organisation remit to Great Britain, rather than the UK as a whole. However, under a Memorandum of Understanding with Tourism NI, Visit Britain hosts information on Northern Ireland tourism on its websites.⁴⁹

As noted in sections 2 and 3 there are a number of cross border arrangements associated with NDPS that operate within Northern Ireland and whose work interacts with tourism development. The governance arrangements of Tourism Ireland (as outlined in Section 2) are the most direct example of this. In addition, there are cross border interactions between DCAL and the Department of Arts, Heritage and the Gaeltacht in the funding and governance of Waterways Ireland, Foras na Gaelige and the Ulster Scots Agency.

6 Regional Tourism Partnerships

Four Regional Tourism Partnerships (RTPs) operate in Northern Ireland. The role of these organisations is to support their members by providing assistance with tourism product development and by marketing local tourism providers at regional and international level.

6.1 Visit Belfast

Visit Belfast is a public-private partnership supported by Belfast City Council, Tourism NI and the private sector. It is the official marketing agency for the Belfast City Region and is '*dedicated to promoting Belfast as a city break, conference and cruise ship destination*'. In addition to working with the Council and Tourism NI, the organisation works in collaboration with Diageo, Value Cabs and Translink.

Visit Belfast represents, and provides marketing and assistance to 520 tourism businesses across the tourism industry, including accommodation providers, attractions, conference venues and services, tour operators, transport providers, entertainment venues, restaurants and cafes, pubs and clubs and event organisers.

Visit Belfast's is currently working under the following tourism targets: '*growing overnight stays, extending the length of stay, and therefore spend, to achieve 100% growth in visitor spend by 2020*'. They intend to drive growth in these areas by focusing its destination and marketing strategy on:

⁴⁹ Department of Culture, Media and Sport, Triennial Review of Visit Britain and Visit England (March 2015)
https://www.visitbritain.org/sites/default/files/vb-corporate/Documents-Library/documents/triennial_review_report_2015.pdf

- Leisure Tourism – including City Breaks, Cruise Ships, Game of Thrones and Day Trips;
- Business Tourism – including meeting incentives, conferences and exhibitions; and
- Global events.⁵⁰

6.2 Visit Derry

Visit Derry is a registered company, supported by the Derry City Council and the private sector. Its role is to *'promote the destination and its hinterland to the national and international tourist market place as an unique, historic, European city competing in world tourist markets and providing quality visitor services'*.⁵¹

The RTP has 235 members and an annual turnover of £740,000. It fulfils the following roles:

- Promoting Derry/Londonderry by representing the district at trade and consumer shows, undertaking sales calls and developing online and offline marketing campaigns. The focus of its promotion work is on leisure, business, maritime visitors and connecting with the diaspora.
- Visitor services, including the management of the Visitor Information Centre.
- Producing and publishing an annual Visitor Guide and Visitor Map.
- Managing a Visit Derry website and associated digital platforms;
- Member Engagement - keeping members and stakeholders informed about research, trends and tourism developments.

During its current corporate plan period, 2015-20, it aims to attract 1m visitors and £100m in tourist spend annually. It is also seeking to create and sustain 5,000 directly or indirectly from tourism.⁵²

6.3 Fermanagh Lakelands Tourism

Fermanagh Lakelands Tourism was set up primarily to market the region as a tourism destination locally and overseas with funding received from the local Council and members. The organisation carries out a number of collaborative campaigns with local providers and 50% of the marketing funding is derived from the private sector.

The RTP's current marketing plan (2015-16) seeks to:

To position Fermanagh as Ireland's premier, quality, natural Lakeland and waterway destination offering unique tourist activities and attractions,

⁵⁰ Visit Belfast Briefing to the Enterprise, Trade and Investment Committee 03 November 2015

⁵¹ *Ibid*

⁵² <http://www.visitderry.com/Portals/4/Brochures/Visit%20Derry%20Corporate%20Plan%202015-20.pdf>

*heritage and culture and meeting the needs of visitors in balance with the local community and environment.*⁵³

Its key objectives are to:

- Increase overall trips to Fermanagh by 2% by end of 2016
- Increase domestic visitor trips by 2% by end of 2016
- Increase annual website hits by 10% per annum
- To increase enquiries into Fermanagh Visitor Information Centre by 5% by end of 2016
- To host total of 100 trade/press/tour operator personnel
- To have representation at 35 domestic and overseas promotional platforms.⁵⁴

This will be achieved by focusing on the area's unique selling points, capitalising on cross-border partnerships, ensuring a customer focus for all activity, and working in collaboration with the private sector.⁵⁵

Future strategy will be shaped by the development of Fermanagh and Omagh Councils tourism strategy.⁵⁶

6.4 Flavour of Tyrone

Flavour of Tyrone is a project that is part funded by Invest Northern Ireland and the European Regional Development Fund under the Sustainable Competitiveness Programme for Northern Ireland.⁵⁷

They produce a range of marketing material to promote the Tyrone area. Their output, which is largely focussed on promoting the areas food, includes:

- Visitor Guide 2015, which outlines visitor attractions and activities available to visitors to and residents of the area,⁵⁸
- Tyrone Good Food Circle Guide, which provides details of restaurants and coffee shops in the area,⁵⁹ and
- A series of recipes showcasing the areas produce.⁶⁰

⁵³ Fermanagh Lakeland Tourism Marketing Plan (electronic copy provided 30 October 2015)

⁵⁴ *Ibid*

⁵⁵ *Ibid*

⁵⁶ Correspondence with Fermanagh Lakeland Tourism 30 October 2015

⁵⁷ Flavour of Tyrone, About Us <http://www.flavourof Tyrone.com/pages/about-us>

⁵⁸ Flavour of Tyrone, Visitor Guide 2015 <http://www.flavourof Tyrone.com/downloads/FOT-Visitor-Guide-2015.pdf>

⁵⁹ Flavour of Tyrone, Tyrone Good Food Circle Guide http://www.flavourof Tyrone.com/downloads/Final_GF_Guide.pdf

⁶⁰ Flavour of Tyrone, Downloads <http://www.flavourof Tyrone.com/download>

7 Industry

Northern Ireland is home to a range of industry associations which work within the tourism sector. These are summarised in Table 2.⁶¹

Table 2: Tourism Industry Association in Northern Ireland

Tourist Accommodation	Activity Tourism	Food and Drink	Skills and training	Events
<ul style="list-style-type: none"> • Northern Ireland Hotels Federation: representative body for hotels and guesthouses. • Northern Ireland Bed and Breakfast Partnership: representative body for the bed and breakfasts and guest houses. • British Holiday and Home Parks Association: representative body of the parks industry. • National Caravan Council: representative trade body for the UK caravan and motorhome industries, covering touring caravans, motorhomes, caravan holiday homes and residential park homes. 	<ul style="list-style-type: none"> • Outdoor Recreation NI: organisation which brings together all groups and bodies, which have an interest in, or involvement in outdoor recreation in Northern Ireland. It is charged with the strategic development, management and promotion of outdoor recreation across Northern Ireland. • Ireland Golf Tour Operator Association: represents local golf tour operators who promote Northern Ireland and the Republic of Ireland as a golf tourism destination. • International Association of Golf Tour Operators: the global trade organisation for the golf tourism industry. 	<ul style="list-style-type: none"> • Pubs of Ulster: professional body of the Retail Licensed Trade in Northern Ireland, with members drawn from pubs, bars, café-bars, hotels and restaurants. • Northern Ireland Food and Drinks Association: a voluntary organisation committed to helping Northern Ireland food and beverage companies compete successfully and to represent and promote their interests. • Taste of Ulster: promotes good restaurants, hotels and other eating places as well as quality producers who offer excellent local food, service and authentic and innovative Ulster cuisine. • Flavour of Tyrone: aims to enhance customer experience through the provision of a high standard of customer care complimented by local fresh produce. 	<ul style="list-style-type: none"> • People 1st: the sector skills council for hospitality, passenger transport, travel and tourism. 	<ul style="list-style-type: none"> • In Any Event: a not-for-profit independent trade association for the Northern Ireland events industry.

Source: Tourism NI

⁶¹ Tourism NI, Industry Associations <http://www.tourismni.com/BusinessSupport/IndustryAssociationsTourismBodies.aspx>

8 Changes to NI Tourism Structures

Northern Ireland's tourism structures are undergoing a period of change. As outlined in Section 4 of this paper, councils have, since April 2015, greater responsibility for the development of tourism within their area. Tourism strategies are still in development in the majority of councils.

The Hunter Review, which was published in June 2014, made a number of recommendations which impact on how Northern Ireland's tourism structures will interact. These have been accepted by DETI (although subject to a business case in some instances). Table 7 summarises the changes that will be instigated as a result of DETI's acceptance of the Hunter Review Recommendations.⁶²

Table 7: New tourism interactions emerging from Hunter Review

Tourism NI & Councils	Tourism NI & Invest NI	Tourism NI & Tourism Ire.	Other
<ul style="list-style-type: none"> • New Memorandum of Understanding between Tourism NI and Councils. • Tourism NI and NILGA to work on the provision of training to Councillors and Staff. • Tourism NI client facing destination managers to be embedded at Council Level. • Subject to budget availability, a Tourism Growth Fund will be established - jointly funded by Tourism NI, Councils, EU Structural Funds and private sector. 	<ul style="list-style-type: none"> • Development of a NI economic brand; • Invest NI to take lead in evaluating major multi-million tourism projects with Tourism NI support (subject to business case). • Colocation and sharing of back office services (subject to businesses case). • Invest NI to take over responsibility of processing grant payments. • Invest NI and Tourism NI to explore joint initiatives as they emerge. 	<ul style="list-style-type: none"> • Deeper relationship through improved communication and collaboration. • Tourism NI and Tourism Ireland to exploit new NI economic development brand to be developed by Invest NI and Tourism NI 	<ul style="list-style-type: none"> • Interdepartmental working group to monitor new tourism strategy implementation. • New MOU to be developed with Visit Belfast. • Tourism NI to extend the development of MOUs to more of its significant partner organisations. • Tourism NI to convene a representative advisory body twice per year. • DEL to review tourism sector training needs with Tourism NI and People 1st. • Tourism NI to monitor industry training needs.

Furthermore, as announced on 2 March 2015 Northern Ireland's Executive Departments are to be reduced in number (from 12 to nine) in time for the 2016 Assembly elections. In relation to those Departments with a tourism impact this realignment will see the following changes:

- DOE's environmental functions and the functions of DARD will be merged to create a new Department of Agriculture, Environment and Rural Affairs.
- DSD and most of DCAL's functions will be merged in a new Department of Communities. It will also takeover DOE's responsibilities for Local Government and Built Heritage
- DETI and DEL will be merged (excluding the Employment Service) into a Department for the Economy.

⁶² Department of Enterprise, trade and Investment, Independent Review of Northern Ireland Tourist Board and wider Tourism Structures – Outcome of Recommendations (January 2015)
<https://www.deti.gov.uk/sites/default/files/publications/deti/outcome-of-recommendations-from-review-of-tourism-in-ni.pdf>

- DRD's function will move into a Department for Infrastructure, this will also take over management of inland waterways from DCAL.⁶³

Planning will also be moved as part of these changes with regional planning, oversight of council planning functions (i.e. oversight of development of LDPs and called-in applications) to a function of the new Department of Infrastructure and community planning a function of the Department of Communities.⁶⁴

⁶³ Office of the First Minister and Deputy First Minister, Reduction in the number of Northern Ireland Civil Service Departments: names and functions of Departments (2 March 2015) <http://www.northernireland.gov.uk/news-ofmdfm-020315-ofmdfm-oral-statement>

⁶⁴ Conversation with Department of the Environment 05 November 2015