

3. New investment

Events

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

Quality Visitor Experience

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

Major Capital Investment

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

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

Tourism is everyone's business. What outcomes will NITB achieve?

NITB is working to build the value of tourism to the economy in partnership with government and industry.

NITB's vision is to confidently and passionately champion the development and promotion of the Northern Ireland tourism experience.

NITB's focus is to proactively apply our knowledge, expertise and resources to achieve the best outcomes for a flourishing tourism industry and visitor economy in Northern Ireland.

NITB UNLOCKS THE POTENTIAL FOR TOURISM.

Through an extensive research and insights calendar, **NITB** drives the tourism development agenda. We work proactively to understand and address the barriers to growth and competitiveness faced by our tourism industry. We work to assess the implications of proposed Government policy and legislation and to garner support for tourism.

NITB BUILDS TOURISM PRODUCTS. We help to improve the quality of the visitor experience by funding the development of tourism assets. We identify and fill gaps in the tourism offer by managing and directing the allocation of capital and revenue funds against nationally significant tourism projects. We collaborate with partners delivering wider regeneration projects that lever tourism benefits.

In the last 3 years **NITB** has delivered 99 capital projects right across Northern Ireland.

Investing £67 million, £84 million of external funding was levered: resulting in investments totalling £151 million.

NITB DEVELOPS THE QUALITY OF THE VISITOR

EXPERIENCE. We invest in developing people, projects and events that will result in an improved visitor experience and increased opportunities for visitors to spend.

NITB PROMOTES THE DESTINATION. We deliver award winning, compelling marketing communications programmes that increase the value of the Northern Ireland visitor economy. We promote Northern Ireland directly to our best prospect customers at home and in Republic of Ireland.

For more information on **NITB** or how tourism benefits Northern Ireland contact:

Gillian Magee

E: g.magee@nitb.com

T: 028 9044 1624

The Visitor Economy

The Role of Tourism as an Economic Driver

The case for tourism

By 2012 almost £300 million will have been invested in tourism infrastructure, largely from the public sector. We are approaching a number of once-in-a-lifetime opportunities that could catapult us to a £1 billion industry by 2020, double the size of the industry today.

This includes the opening of the Titanic visitor attraction and the Giant's Causeway visitor centre in 2012, the title of UK City of Culture for Derry~Londonderry in 2013 and the World Fire and Police Games, also in 2013.

A recent economic report put tourism's potential at creating thousands of new jobs. With the right investment and good collaboration across government NITB believes that the potential could reach 10,000 additional jobs over the next ten years if key opportunities are seized.

How tourism benefits Northern Ireland?

Over the last ten years, Northern Ireland has fought hard for our share of the growing travel and tourism market. 3.3 million people visited Northern Ireland in 2009.

Northern Ireland tourism is....

- **A driver of economic growth** contributing 4.9% (£1.49bn) of Northern Ireland GDP.
- **A wealth generator** with a high multiplier effect. 123 products and services across the UK's Input/Output Classification. The total revenue generated by the Northern Ireland tourism industry in 2009 was £529 million.
- **A job creator.** Currently 40,000 jobs are sustained by tourism activity. 5.6% of total workforce or 1 in 18 jobs in Northern Ireland is directly supported by the visitor economy. These people are employed in every constituency and at every skill level.
- **A sector rebalancing the economy** which was relatively cushioned by the downturn and now actively recruiting.
- **An export generator.** Tourism is purchased abroad but consumed in Northern Ireland and all revenue stays in Northern Ireland.

In 2009 whilst staying in Northern Ireland visitors from outside of the UK generated £159 million.

Visitors from out-of-state (including Great Britain and Republic of Ireland) generated £337 million.

According to The Pink Book: 2010 edition (ONS), travel exports was the third largest trade in the services export account in the UK in 2006 and 2007 and the fourth largest in 2008 and 2009.

- **An innovative sector** embracing technology in its widespread use of e-commerce tools, for its applications to new products and for developing new methods of marketing and promotion.
 - **A source of pride for the people of Northern Ireland.** Promoting Northern Ireland as a tourism destination creates an undercurrent of positive change. It positively positions Northern Ireland as a safe place to live, work, study and invest.
- Investment in tourism brings new facilities, regeneration to our towns and cities and restoration of our significantly important buildings, thereby creating a sense of pride for the people of Northern Ireland.

What can tourism deliver in 2020?

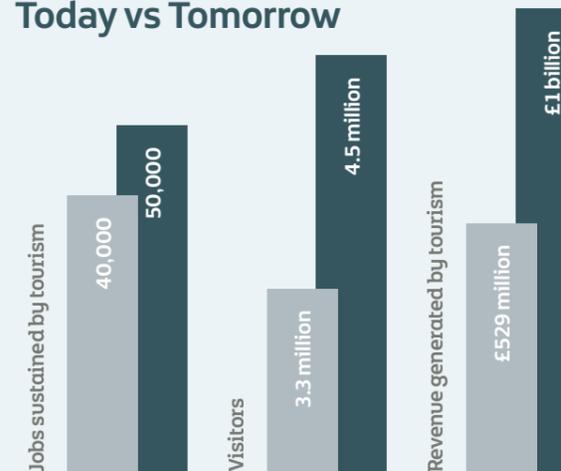
Tourism offers unparalleled potential to generate growth and create jobs across Northern Ireland.

4.5 million people will visit Northern Ireland in 2020.

Northern Ireland tourism will be...

- **A wealth generator** - The total revenue generated by Northern Ireland tourism industry will DOUBLE to £1 billion.
- **A job creator** - 50,000 jobs will be sustained by tourism activity.
- **An export generator** - In 2020 whilst staying in Northern Ireland visitors from outside the UK will generate £350 million. Visitors from out-of-state (including Great Britain and Republic of Ireland) will generate £750 million.

Today vs Tomorrow



What return can be achieved?

The tourism sector will be actively working to build the value of tourism to the economy over the next few years. Department of Enterprise Trade and Investment's Tourism Strategy for Northern Ireland 2010-20 has set the context and goal:

“to double the income we earn from tourism by working together to grow tourism to the benefit of all”

This requires all delivery agents to work together to:

- Increase visitor numbers from 3.2 million to 4.5 million
- Increase earnings from tourism from £520 million to £1 billion
- Support indigenous high quality businesses to grow.

To realise this potential will require the allocation of the right resources and a new, shared approach adopted across the sector and across government. Within this context one of the major challenges will be sustained government investment, given the likely significant pressure on public sector spending from 2010/11 onwards.

Removing barriers that impede our growth

Tourism is not fully mature and developed. It will take time to create more confidence in tourism as a viable sector. NITB therefore has a role to play in reorienting and transitioning the sector away from public sector dependence through developing capability and expertise within the tourism industry.

Government also has a role to play in the interim by continuing to invest in tourism and in developing the tourism product on the ground. In addition, Government should also address those policy and legislative issues that impede the growth of the sector and challenge its competitiveness:

1. Policy intervention

Review Legislation

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

National Park

Secure a designated location in Northern Ireland.

Accessibility

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

Planning

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

2. Sustained investment

Marketing

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

Regeneration

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

Sweat the Assets

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