Mid and East Antrim

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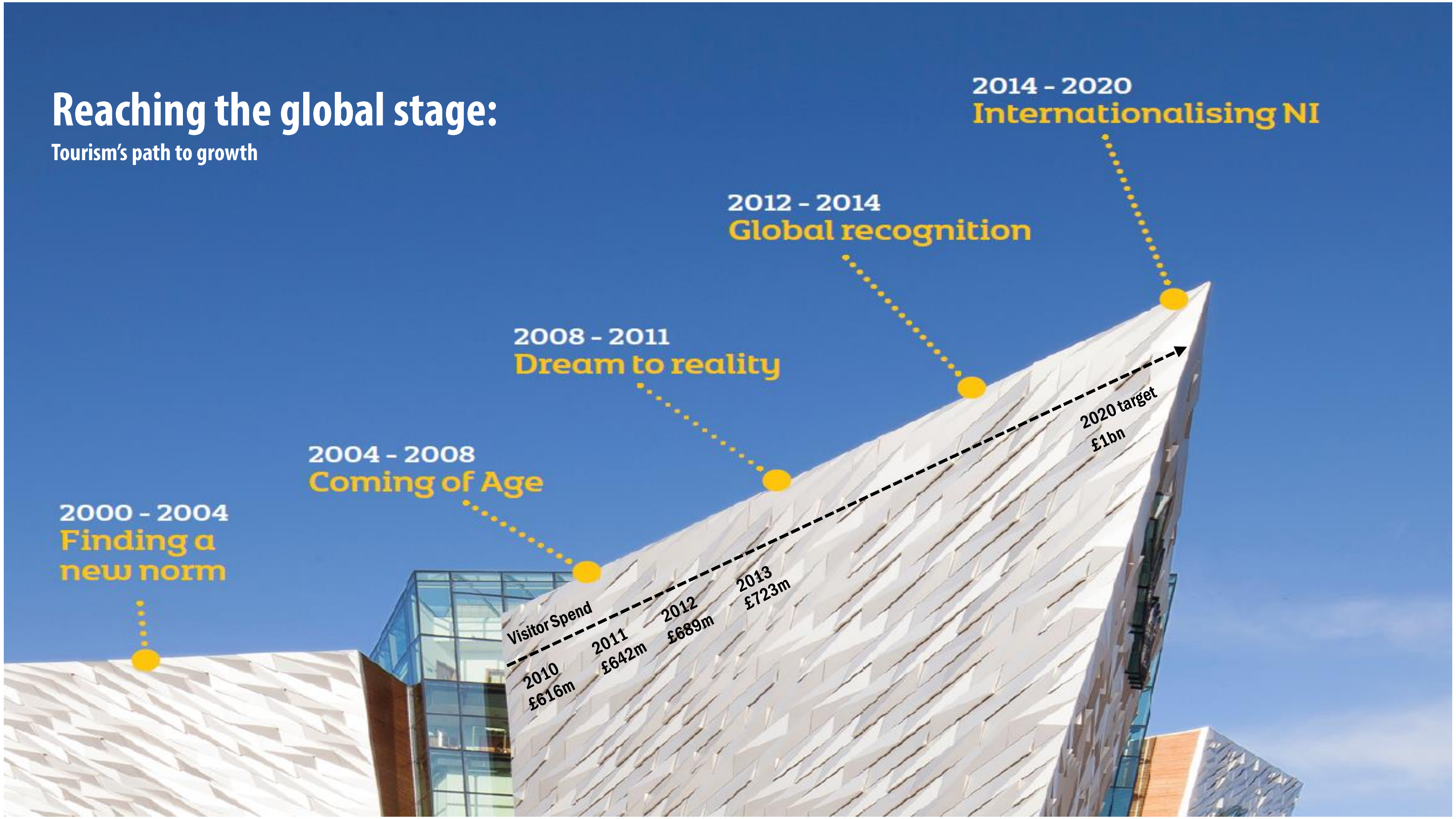
Overview:

1: NI Tourism Journey – reaching, competing and staying on the global stage

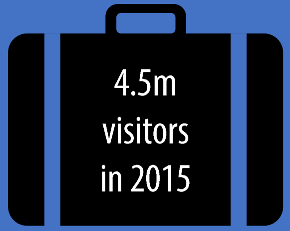
2: Mid and East Antrim in Focus – current performance and considerations for the future

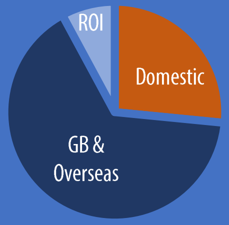
3. Working Together - partnering with TNI for shared success.

The Northern Ireland Picture -the journey so far


Reaching the global stage:
Tourism's path to growth
2014 - 2020
Internationalising NI
2012 - 2014
Global recognition
2008 - 2011
Dream to reality
2004 - 2008
Coming of Age
2000 - 2004
Finding a new norm
Visitor Spend
2010 £616m
2011 £642m
2012 £689m
2013 £723m
2020 target £1bn

Tourism in a National Context





total revenue of £764m in 2015, of which:

£484m from GB & overseas

£219m from domestic

£61m from ROI

5.2%

of NI's GDP

**supports
1 in every 18 jobs**

representing 43,000 jobs

Recent trends

latest 2016 figures (Jan-March) show that:

overall spend up 10%

overall visitors down 7%

GB & Overseas visitors up 8%

ROI visitors up 13%

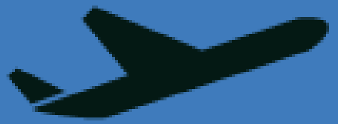
Domestic trips down 20%

mixed accommodation fortunes:

hotel beds sold Jan-June 2016 down 2% (due largely to a poor first quarter)

more mixed performance in regions

B&B/GH/GA sector performing well – Beds sold are up by almost one third (31%) on Jan-June 2015



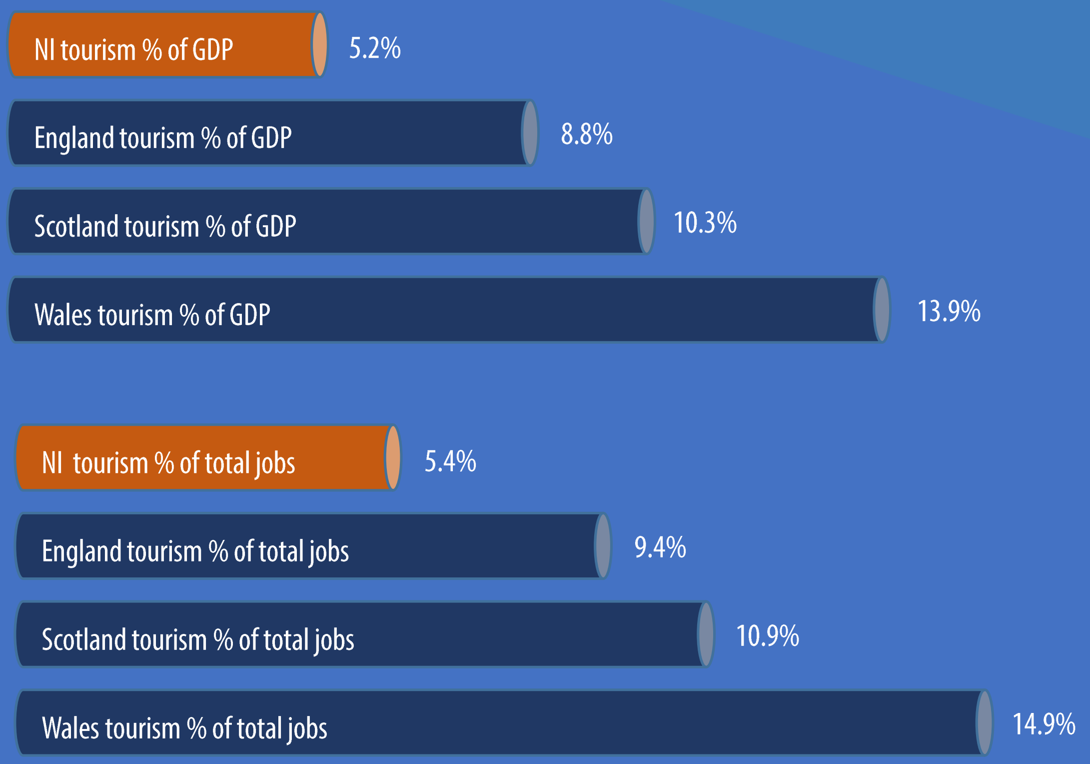
air access:

air capacity into NI was up 10% on summer 2015

capacity from Europe increased by 9%

capacity from GB grew by 11%

Health check in comparison to other regions



Overseas visitor to NI spend £54 per night

Overseas visitor to Scotland spend £87 per night

Overseas visitor to England spend £85 per night

Overseas visitor to Wales spend £49 per night

Challenge :
Grow Spend
££££££££££££

Where to next?

Competing the Global stage

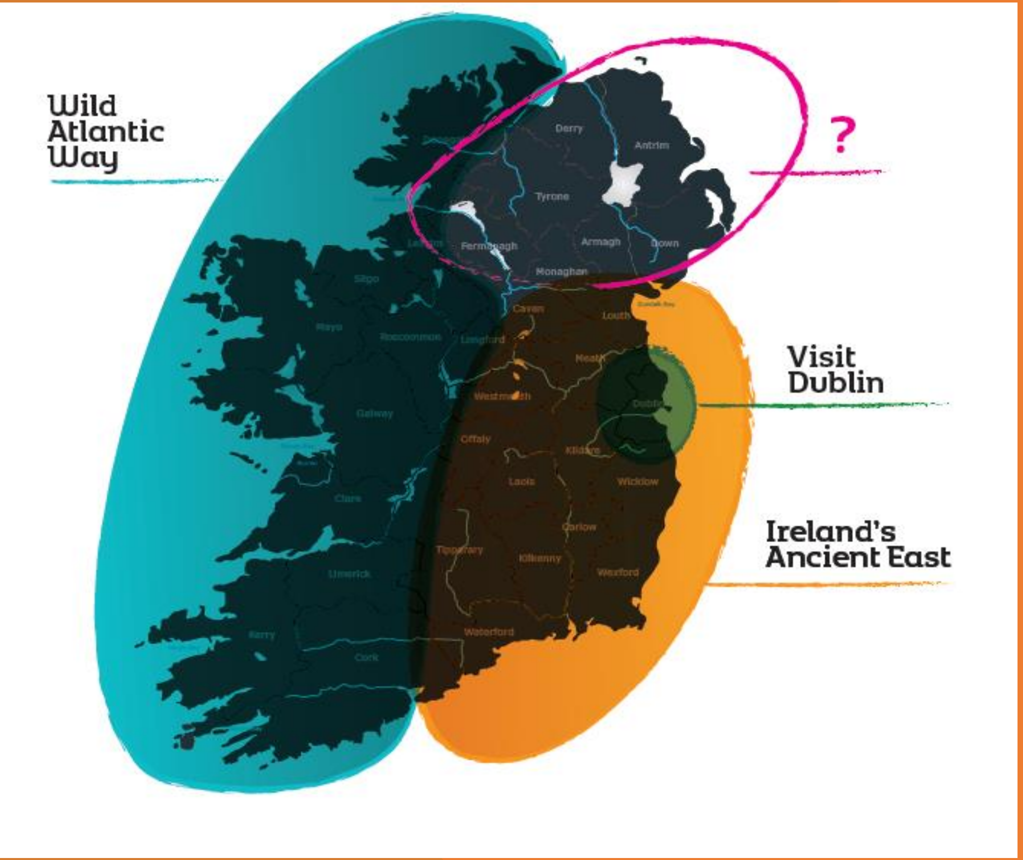
- 'Internationalise' NI
- Double the Value of 'Export Tourism' by 2025
- £1 billion Tourism Strategy

Emerging Themes Through Consultation.

- Need to be Market Led
- Need for Product Focus
- Need to build reputation – business tourism and events
- Need to build skills and capabilities of the industry

Change the Way we 'position' Northern Ireland Overseas

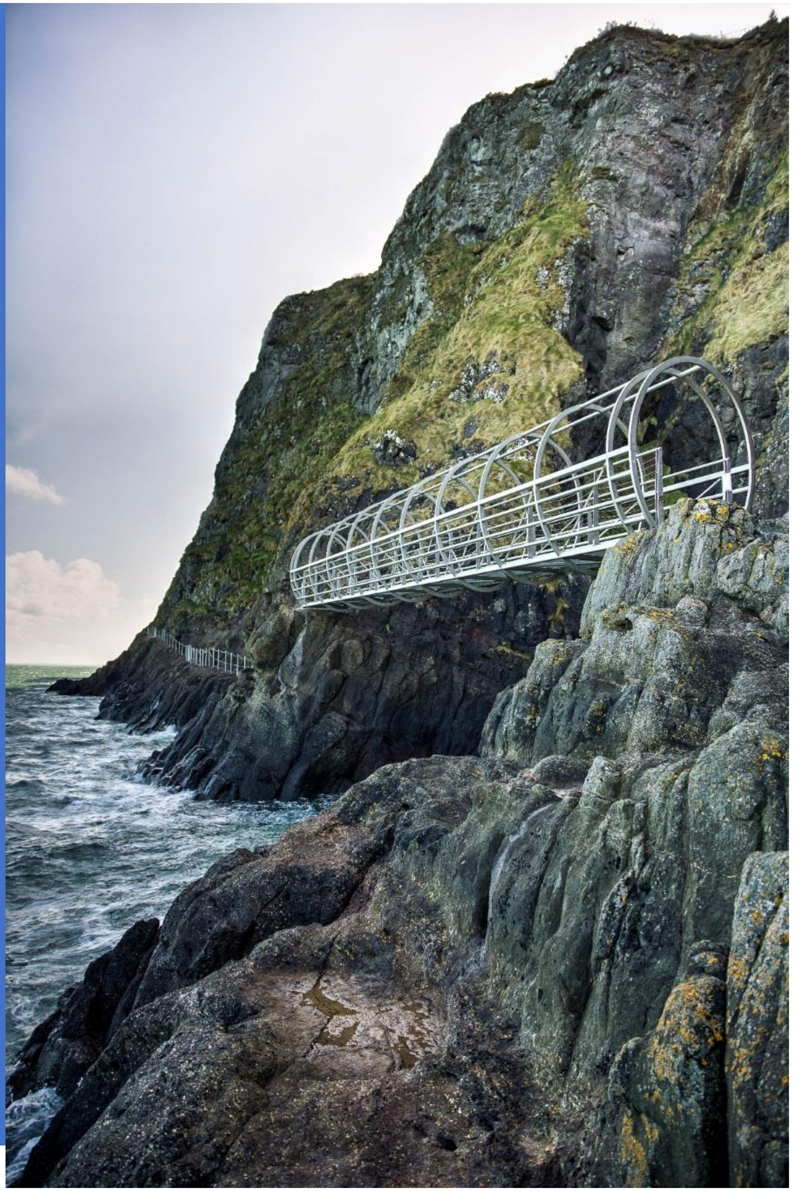
Think Bigger – join up the dots in a more coherent and compelling way



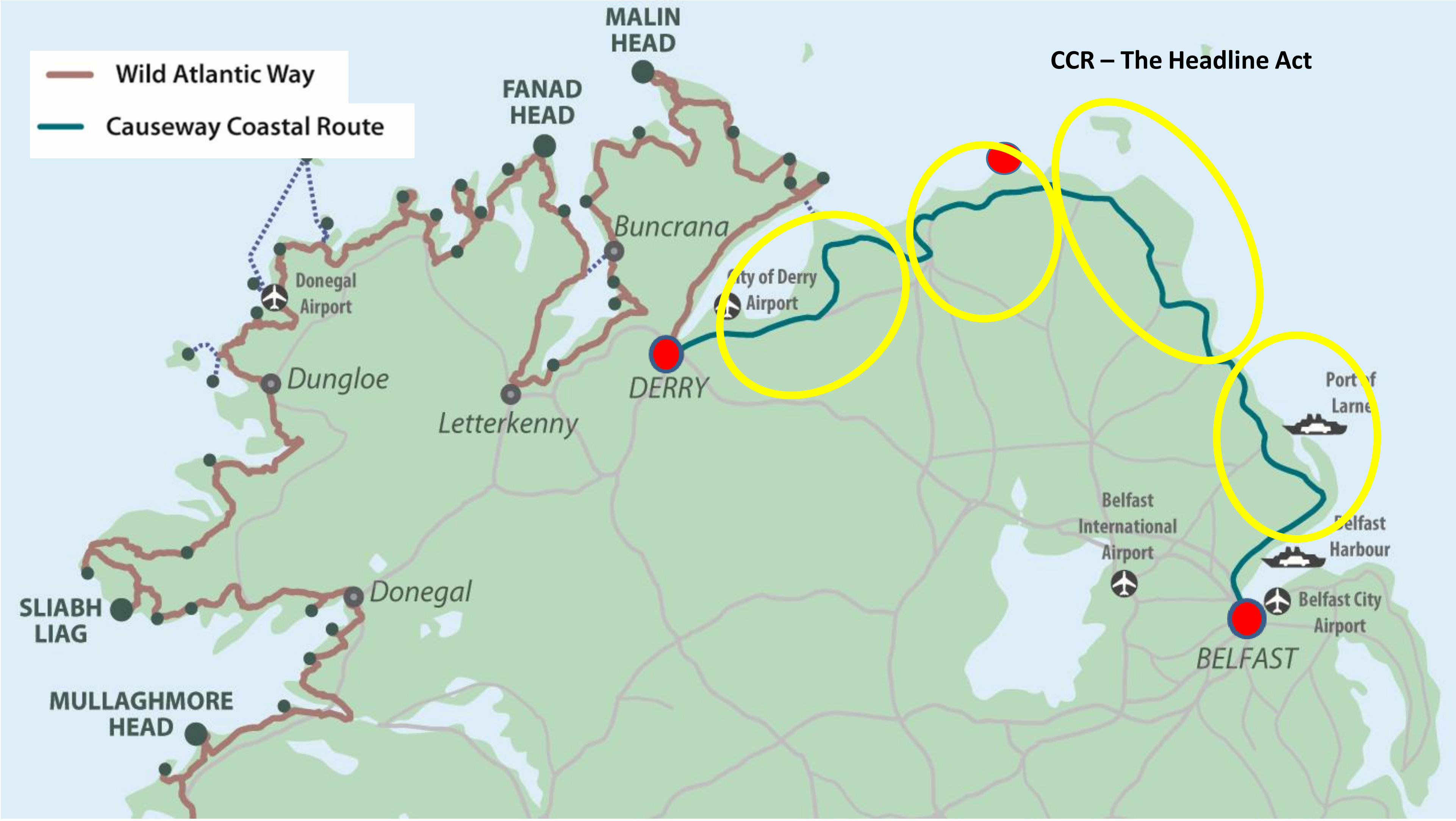
The Role of
Mid and East Antrim

The Gobbins - a Game Changer!

- International demand generator
- Excited the imagination of international markets
- Provided an opportunity to re-position the Causeway Coastal Route



CCR – The Headline Act



Causeway Coastal Route

The 'Big Concept' Sell

Tourism Clusters

- **The Gobbins**: Belfast - Ballygalley
- **The Glens of Antrim**: Slemish / Glenarm – Ballycastle & Rathlin
- **The Causeway**: Ballintoy - Portstewart
- **Binevenagh & Beyond**: Castlerock – Walled City

The Gobbins

The Glens

The Causeway

Binevenagh & Beyond

	Causeway Coastal Route
Distinctive core attractors	• **Giant's Causeway is currently functioning as the main attractor and demand generator.** • **The driving route itself has the potential to be more of a demand generator in its own right.** • Generates significant overseas demand / appeal but needs to lengthen the season. • Top scores for uniqueness and authenticity – can really give Northern Ireland international standout.
Critical mass of supporting product	• Good range of attractions and activities along the route – but need to be better clustered together to move away from daytrip tendencies. • More work needed around story / theme development amongst the supporting product. • Lots of culture and stories but need drawn out so that they are visible and accessible for the visitor. • Needs development in dining options along the route. • Opportunities to link some standalone product with NI-wide themes where appropriate.
Accessibility	• Lack of joined up ticketing but products / experiences can be bought separately. • Most options are free / low-cost – need to develop the route commercially. • Improvement needed in public transport / shuttles to enable visitors to explore. • Good broadband connectivity and access to visitor information. However, evidence of fragmentation in digital channels.
Accommodation base	• **Lack of accommodation suitable for coaches – encourages daytrip tendencies.** • **Lack of 4/5 star hotels.** • Opportunities for further development of unique / distinct accommodation options that integrates with the destination (e.g. Ballygally, Bushmills Inn).
Existing reputation & market demand	• **Evidence of strong market demand. Need to move away from daytrip market and encourage overnights / increase length of stay.** • Good name recognition thanks to Giant's Causeway. • Potential need for rebranding / repositioning of the Causeway Coastal Route.
Marketability	• **Evidence of steady / growing demand for coastal breaks, particularly amongst key European segments.** • Need for a single point of marketing which is responsible for selling the Causeway Coastal Route in its entirety. Fragmentation is a risk. • Lots of engagement with travel trade but efforts need to be commercially focussed.
Product renewal	• Private sector need to reinvest in developing and enhancing the visitor experience. • Lots of potential for further development of the destination through capital investment.
Industry capability	• **Evidence of fragmentation. The industry needs to buy into the Causeway Coastal Route as a holistic destination and align themselves accordingly.** • Some evidence of collaboration in pockets – but not across the whole route. • Signs that the industry has not invested in customer service training programmes as much as other NI destinations.

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Partnership

1. Dedicated Regional Manager
2. Support the development of a local tourism plan
3. Support the industry:
   1. Bespoke insights and business support tools
   2. Mentorship programme to support ‘clusters’

Thank You