

A Prospectus for Change

A strategic framework to unlock the
potential of heritage-led tourism in
Northern Ireland

December 2017



tourism
northernireland

“Our living heritage is rightly valued for its cultural, educational, aesthetic and historical importance but we can now also clearly see that it is an economic driver for inbound tourism to the UK, as well as sustaining domestic tourism too.”

Bernard Donaghue, Association of Leading Visitor Attractions, 2016, ‘The Impact of Heritage Tourism for the UK Economy’



Derry Londonderry UK City of Culture 2013

Contents

INSPIRE

- 1 A statement of intent 05
- 2 Why do we need to look at heritage tourism? 07
- 3 A little bit about cultural tourists 09

DIRECT

- 4 Heritage tourism in Northern Ireland:
a dispatch from 2022 12
- 5 The vision 15
- 6 Key issues 16

SPECIFIC

- 7 The strategic building blocks 17
- 8 The route map 33

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INSPIRE

1. A statement of intent

Northern Ireland has a future filled with exciting tourism possibilities. One of these involves switching on the latent power and appeal of its cultural and heritage offer.

Representing 40% of the visitor market, cultural tourism is taken increasingly seriously by cities and regions the world over. It delivers rich and memorable experiences. It triggers the imagination. It connects visitors with the landscape and the heritage, art and ideas of the host community. It builds up a story of a place, where it has come from and where it is going. It creates compelling destinations, known for what they stand for as well as what they offer.

Developing a culture and heritage tourism strategy can be a game-changer. In challenging destinations to identify and celebrate their distinctiveness it revitalises, focusing on the quality of the experience and driving improvement. It fosters a greater appreciation of cultural and heritage resources and their value, breaking down the divisions between high and popular culture, ancient and contemporary stories. It generates pride in the host community and standards go up. Activities, events, collections and venues are given a contemporary relevance, so that the visitor can understand themselves in it.

So why is culture and heritage tourism underplayed in Northern Ireland? Perhaps it is not understood? Perhaps the terminology seems off-putting or contradictory? Perhaps tourism partners focus more on bed nights than working with operators and visitors to build up (brand) themes? Perhaps the individual attractions seem too small with only a few highlights achieving national resonance? Perhaps the elements are not put together as a linked, threaded and clear story so creating a bigger whole out of the constituent parts? Perhaps the industry is not operating at its best? Perhaps it is all of these?

This document shines a spotlight on some of these issues and suggests some answers to inspire debate and discussion with heritage, culture and tourism partners across Northern Ireland. It hints at what might be possible to entice partners out from their silos and be bold, take risks, get creative and develop products that collectively are big enough to be noticed from far away – and intimate and personal enough to be remembered close-up.

Its mission is to develop your appetite for change. To inspire a vision that you own and are reflected in. To help create the right conditions for success and to learn to think like a visitor – someone overwhelmed with choice about where else to go, seeking the inspiration, reassurance and motivation to make a confident and clear decision to visit you.



NERVE CENTRE ANIMATION

Featured at the launch of Derry Londonderry, UK City of Culture 2013



*** Heritage Attraction Visits**
 Based on visits to:

- Historic Properties
- Museums / Art Galleries
- Visitor / Heritage Centres
- Work Places
- Places of Worship
- Other Relevant Locations

(Based on figures supplied to NISRA)

Statistics refer to 2016 trips, overnight stays and spend unless otherwise stated.

Source: Creative Tourist Ltd

2. Why do we need to look at heritage tourism?

The vision for tourism to 2020 has clear ambition – a £1 billion contribution growth to the local economy, with 4.5m visitors per annum and an additional 10,000 jobs created. The product offer needs to get better to deliver against such targets. This will be achieved by an offer that is distinctive in the international marketplace, and nothing is as unique to ‘place’ as heritage and culture. This brief’s focus is on heritage tourism. But it is in its engagement with culture and the subsequent animation to the nation’s stories where value will really be added, creating the kinds of visitor experiences that can project the heritage offer forward.

Forward to compete with established destinations like the Republic of Ireland (e.g. *Ireland’s Ancient East*), Wales and Scotland, and be an emerging niche market tourism star. The demand for this kind of heritage tourism offer is demonstrable – through pre-existing market research and the investments and successes of comparable destinations, notably in the neighbouring territories of North and Western Europe. The target markets overlap with these territories, as well as targeting the North American market.

Northern Ireland has many heritage strengths, not all of which are yet to be fully realised in terms of tourism potential, and some that are not contributing significantly to the tourism economy – held back by lack of ambition, lack of awareness of visitor expectations and trends, risk-averse management practices, lack of investment and subsequent development.

This is a young nation in tourism terms (and therefore playing

‘catch-up’ with other destinations which have seen significant investment in their heritage offer over decades) now coming to terms with its contested histories and how to represent them for visitors. A unique ancient history rubs shoulders with the contemporary through the authentic stories they tell – stories that can only be told here and have global resonance. The island of Ireland is a famous home to storytelling, but the North has something different and edgy all of its own, rooted in its people, histories and landscapes

The challenge is to extend awareness of the full heritage tourism offer beyond a few key sites. This is not a unique challenge. 90% of visitors to London are swallowed up by the top 20 attractions¹. Bear in mind, this is a global city of 4 UNESCO World Heritage Sites, 857 art galleries, 40m visits to cultural institutions and where 80% of visitors say ‘culture and heritage’ are the reason for their visit².

In Northern Ireland, there are too many sites that (for many reasons) are not contributing significantly to the tourism economy – in part through underperformance, exacerbated by under investment and development.

One particular challenge is the ownership of the heritage portfolio across the country – local authorities, major conservation charities,

¹ *Annual Survey of Visits to Visitor Attractions, 2013*

² *Take A Closer Look, A Cultural Tourism Vision for London 2015-2017*



national bodies and independents – and how they come together, or not, with the support of national agencies and government, notably the Historic Environment Division. Local authorities have recently undergone major restructuring, which is still bedding in. As a result of this uncertainty and underlying budget cuts, conservation typically has taken precedence over expansive and user-focused tourism development in the heritage sector. While good practice is recognised elsewhere, restructuring, process and bureaucracy have delivered limited progress.

We also do not yet know what the impact of Brexit will be. The many variables around border controls will inevitably impact tourism and perceptions of accessibility. The connected pan-Irish stories will also have a role to play in this respect.

2.1 OBJECTIVES OF THE REPORT

1. To highlight the current issues which are preventing key heritage tourism assets from performing to their full potential.
2. To identify new approaches to animating and interpreting heritage for example through collaboration with the arts/cultural sectors and through new technologies, which will examine the linking of sites to their local place, stories and people and illustrate how these can be applied to Northern Ireland attractions.

3. To identify and prioritise Northern Irish heritage assets, that through investment, have the potential to increase visitor numbers and spend, highlighting those in tourism areas which are underperforming and have the potential to do more.
4. To identify best practice heritage management structures and practice – i.e. best in class – and how these can be adopted by small and large-scale Northern Ireland heritage providers.

The heritage tourism portfolio is strong in many ways – quality, variety, settings, some new investment – even if not all are fully focused on tourism and the revenue potential it represents.

There have been a number of mapping exercises – this version was part of our early analysis:

www.google.com/maps/d/viewer?mid=1GoE0dKFfA-7_pPN23YAC-5VPwMw&ll=54.627967824636656%2C-6.839296999999988&z=8.

This report was prepared on behalf of Tourism Northern Ireland by Creative Tourist Ltd (www.creativetouristconsults.com)

“...there is now a unique opportunity to symbolically connect the two worlds of a progressive political legacy around reconciliation with the cultural and spiritual imagination of Northern Ireland and Republic of Ireland through their shared northern literary lands. It is a way of ensuring that culture is more on stage than off stage and that our self-image, our collective imagination and our cultural horizons are not simply – in a striking line from Seamus Heaney – “the loss occurred off stage”.”

HAPPY DAYS EIBF LTD (2016), QUOTED IN THE CLINTON INTERNATIONAL CENTRE VISON DOCUMENT

3. A little bit about cultural tourists

3.1 DEFINITIONS

Heritage/cultural tourism is recognised as one of the largest and fastest growing segments within the global tourism marketplace. According to the **World Tourism Organisation** (www.world-tourism.org) this includes 'all aspects of tourism that can teach visitors about their past and inheritance, as well as their contemporary lifestyles'.

This approach focuses primarily on the potential of **arts- led culture** as a driver for attracting culturally motivated visitors to Northern Ireland and its heritage – in cities, towns, country and coast. It focuses on existing and planned heritage and cultural investments, which are varied, and how they might be made to work as part of a joined-up heritage and culture tourism vision and plans.

It recognises the importance of **cultural heritage** in underpinning the offer, and goes beyond the immediate heritage/culture parameters to look at the wider tourism offer – such as food, drink, outdoor, accommodation – in how it helps create the right visitor experiences. It *doesn't* extend to business or sport tourism, which are nonetheless of relevance to Northern Ireland.

Whilst standard definitions of cultural and heritage tourists do not exist, studies³ have segmented cultural tourists by well-defined characteristics:

- _ From geographically distant source markets;
- _ Are first-time visitors;
- _ Use travel information sources;
- _ Stay more nights at the destination;
- _ Recall places and communities they visited;
- _ Engage in other travel and hospitality activities;
- _ Spend more money than non-cultural tourists.

Importantly, the more culturally-motivated the visit, the higher the levels of engagement with the destination. This is essential where a destination wishes to change or challenge its public perception.

Types of cultural tourist can be further broken down, as:

- _ **Purposeful cultural tourist:** cultural tourism is the primary motivation for visiting a specific destination and the tourist seeks a very deep experience;
- _ **Sightseeing cultural tourist:** cultural tourism is a key reason for visiting a specific destination but the experience isn't deep;

³ McKercher and H. Du Cros, *Cultural Tourism: The Partnership Between Tourism and Cultural Heritage Management* (2002, revised edition now available), as referenced in Paul Williams, *Staffordshire University, Cultural Tourism and the UK City of Culture, Tourism Insights, April 2010.*



- _ **Serendipitous cultural tourist:** the tourist does not travel for specific cultural reasons, but in engaging with what they find, ultimately does have a deep cultural tourism experience;
- _ **Casual cultural tourist:** cultural tourism is a weak travel motivation and the resulting cultural experience is shallow;
- _ **Incidental cultural tourist:** the tourist does not travel for cultural reasons, but does engage in some cultural activities and has shallow experiences.

3.2 CULTURALLY-INFUSED HERITAGE TOURISM

This process is based on some key tenets of cultural tourism, namely:

It is all about the place: Culture is just one of the ways that a place defines itself. The focus thus needs to be on the *whole offer* rather than single institutions, one-off events, signature attractions or seasonal highlights. Calendar events may act as a hook, but presenting a joined-up, coherent and compelling offer that covers all the tourism bases is vital.

There are no quick fixes: It takes time to change perceptions, generate interest and convert that interest into visits. The process begins with building positive awareness, moves into addressing perceived 'risks' and finally presents the hooks that encourage a warmed-up tourist to book. The focus needs to shift away from measuring impacts by venue or event attendance alone. Instead, we must be prepared to measure strategically and holistically – and with an eye on the bigger picture.

The three C's: *Collaboration, continuity and consistency* are key ingredients of successful cultural tourism development. Why? An established cultural/heritage destination will have a continual, year-round offer that is marketed consistently if it is to create the sense that it is 'worth a visit'. Destination-wide (and where appropriate nation-wide) collaboration is vital, joining up offers and programmes across multiple locations and working together on everything from product development to the visitor welcome.

No silos: Think outside the sector. Heritage tourism partnerships must necessarily include arts organisations, event producers, local authorities, tourist agencies, attractions, hotels, transport providers, food and drink companies, retailers and so on. But this isn't easy to achieve, as it brings together organisations with different agendas, resources, cultures and planning cycles.

All heritage and culture is not equal: When working in partnership, it is tempting to give everything equal billing. This approach leads to bland marketing campaigns. Instead, successful cultural tourism demands a highly targeted, market-led 'editorial' approach, one that only selects the highlights of what's on as those highlights will be viewed by a culturally discerning tourist. Choosing



A WILDE WEEKEND (2015)

Kabosh Theatre Company's *Ballad of Reading Gaol* at the Old Gaol, Enniskillen

the best to present to the market ultimately raises the collective game. Until then, smaller events and activities will typically remain important, creating the 'wraparound' offer that underpins headline events and encouraging potential visitors to see a destination as a rich, varied place that deserves a visit. Take Wales for example, which is focusing on legends and literature for 2017. It does not exclude other aspects of its offer, but rather seeks to weave them in to itineraries, programmes and bookable product through existing and new portals and channels.

Identify the risk: Unlike other markets, cultural tourists don't seek cultural reassurance, they make confident and informed choices, drawing on their own knowledge and personal experiences. For them, the risk in a visit revolves almost entirely around place – and they seek reassurances that the place will deliver to their needs and expectations. Communications have to tackle this head on, possibly challenge negative perceptions and make appropriate suggestions for accommodation, food and drink, trips and itineraries. Much of the Northern Ireland offer is still relatively unknown and thus prone to general assumptions and descriptions. A structured presentation of the offer through distinctive heritage and culture can build awareness and confidence in the full offer and likely holistic visitor experience.

Be selective: There is no single cultural tourism market – just lots of niche segments, from cultural trend setters through to active families, cultural trophy hunters and checklist sightseers. Use available tourism and cultural market data, but apply it flexibly and

adapt to suit the place. Identify markets on three criteria: a good match with the product; an ability to access the market via targeted channels of communication; and the market's ability to access you.

Find a distinctive voice: Authenticity and personality builds credibility, and it is important to build trust by being truthful about the offer and sharing insider knowledge with visitors who might otherwise be wrong-footed, or fail to find the best experiences.

Then amplify it: Digital is the tourism marketer's best friend, allowing you to be both narrowband in terms of interest/lifestyle and broadband in terms of reaching geographically dispersed markets.

Innovate: Travel and culture are both fast moving sectors. Amongst today's watchwords are local-sourcing, intimate, immersive, authentic, pop-up – but tomorrow's will be different. Balance long-range planning with the need for flexibility to allow for responsiveness and product development. Follow the cultural influencers of our target markets to keep pace, and maybe even set the trends. As a small destination on the international map, this ambition has obvious merits and the assets do create opportunities to be bold.

These principles are at the core of the approach and inform this analysis of Northern Ireland and its potential and readiness as a cultural destination, placing heritage at the heart of the offer.



Belfast rates highly at 87%, above London (84%) and Cardiff (82%)

WHICH? TRAVEL

Best and Worst UK City Break Destinations 2017

DIRECT

4. Heritage tourism in Northern Ireland: a dispatch from 2022

4.1 WELCOME TO NORTHERN IRELAND, 2022

Where an ancient landscape is the bedrock and backdrop of a confident, outward-looking, modern destination.

It's 2022 and Northern Ireland is establishing itself as an exciting and new cultural destination – a dynamic and fresh approach towards heritage and cultural tourism is a very visible manifestation of a cohesive nation, seen and understood around the world.

The appeal of Titanic and Giants' Causeway endures, but invigorated and refreshed as part of a bigger proposition – one boosted by significant experiences of scale and singularity that stand out in the international marketplace and get to the heart of what it means to be Northern Ireland – where it came from, what it came through and where it is going. How it is both a part of, and apart from, the Island of Ireland and its Celtic neighbours Scotland and Wales.

Confident and spirited, the economic challenges and political tensions which have damaged (perception and development in) NI, and held it back, are openly and thoughtfully reflected in its narrative and stories of place and people. These are stories that

genuinely cannot be told anywhere else in the world – and they are compelling and huge.

For those individuals and organisations making this happen – NI 2022 is a very different place to do business and to make and shape a cultural-heritage tourism offer. No longer isolated and fragmented, tourism, culture and heritage partners recognise and align behind a **single purpose** and clear, shared aims.

Strategies are joined up – matched by investment and funding streams, learning from the successful England model – where significant funding streams bring sectors together to draw down investment [similar to Cultural destinations (Arts Council England and Visit England), Discover England (Visit England), Great Place (Arts Council England and Heritage Lottery Fund)].

These working partnerships are actively connecting places by theme, geography, travel routes, seasonality – to encourage 'nation-think', generate critical-mass and make it easy for visitors to discover, intentionally and by happen-chance, exciting new experiences in unexpected places not previously on the international tourism circuit, hidden in plain sight, under developed or unknown.

Alongside this openness, there is a new willingness to share. As a legacy of The European Year of Cultural Heritage (2018) Historic Royal Palaces and National Museums Northern Ireland continue to lead a consortium of heritage operators of all shapes and size,



Benbane Head, Causeway Coastal Route: voted Northern Ireland's 'Most Epic View'

sharing data, skills and knowledge to raise ambition, standards and scale.

There is new level of ambition and a willingness to take creative risks – unafraid of connecting imaginatively and sensitively to the difficult issues and concerns of the world, on which Northern Ireland has a unique ownership, perspective and story to tell. Stories around peace and conflict and mass-migration are a stimulus for thoughtful but still accessible tourism experiences.

A series of bold, new large-scale cultural heritage tourism offers stand out in the international marketplace, combining flagship events and attractions with smaller wraparound activities that are inventive and fleet-of-foot. Northern Literary Lands is one fine example – using the international credibility and reach of national literary and storytelling icons to ignite an exciting proposition connecting things up across the full literature making and storytelling spectrum. Ground-breaking literature festivals explore the physical and emotional borderlines of the Irish experience, staging the works of Northern Ireland's great playwrights, poets and novelists in dramatic, site-specific locations. They are rising stars of the international festival circuit, attracting performers and producers with an international fan-base, and feature in the best-of-year round-ups in travel and arts media. Seamus Heaney HomePlace in Bellaghy and Clinton Centre in Enniskillen anchor the theme year-round with exhibitions, workshops and events and, fittingly for a nation of storytellers, the theme punctuates the heritage experience as theatre in castles, or on hillsides and beaches; in town-trails;

themed weekends; walking tours; with author-recommended itineraries and stay-with-a-writer Airbnb packages.

On the ground, local people are also making a difference – servicing the needs of a developed and dispersed cultural-heritage tourism market and responding to new market opportunities. It is informal and organic as well as planned and infrastructural. The cultural and creative vibe of the cities is now radiating across key towns and villages, creating new opportunities for artists, festivals, food producers, venues and retailers. Abandoned watchtowers and derelict border police stations enjoy new uses as studios, galleries and performance venues; prompting artist trails and open-studios, festivals, events, cafés and new accommodation.

Another outcome is a series of cultural itineraries connecting coast and country. One focuses on 'identity', engaging the returning diaspora, connect with their cultural roots. Taking in museums, archives and records offices via the redeveloped Ulster American Folk Park en route – it tells a story of community and individual heritage, unafraid of tackling difficult questions of nationalism, migration and belonging.



ULSTER AMERICAN FOLK PARK

An important asset in connecting the Northern Irish diaspora with their heritage.

Literary heritage continues to
infuse the nation and landscape...



5. The vision

We want more cultural heritage visitors to come, and come back, to Northern Ireland.

We will work together to promote the distinctive offer to domestic and international visitors.

We want them to be inspired to explore new, diverse and surprising cultural heritage, across the entire nation.

We want their visitor experience to be unique to Northern Ireland.

We will tell our stories woven into a compelling cultural heritage narrative that celebrates the people, places and storytelling DNA of our country.

We want Northern Ireland and its diverse and dynamic heritage and culture to be an obvious first-choice, 'must-see' destination for culturally motivated travellers.



Crumlin Road Gaol

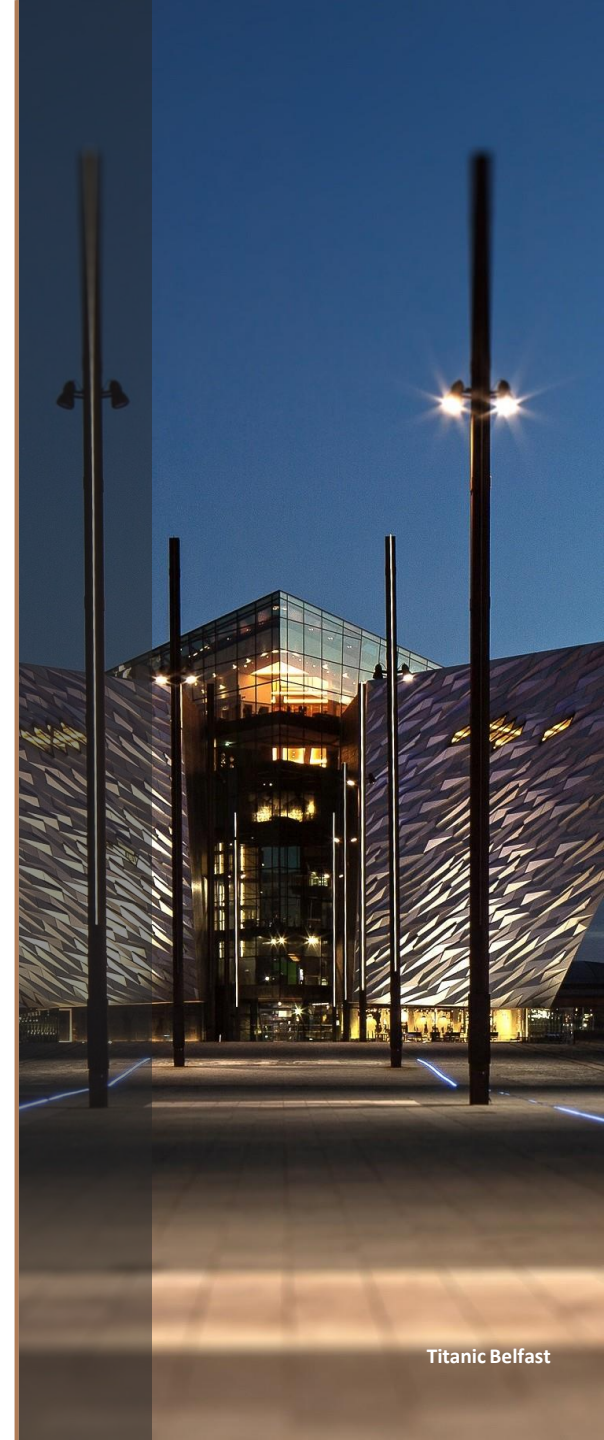
6. Key issues

Key questions include:

- _ What approaches to animating and interpreting heritage sites can be adopted using creative, cultural and technological means?
- _ Where is best practice in delivering amazing culturally creative experiences for visitors to enhance heritage offers, and which can be applied?
- _ Which parts of the heritage portfolio have the strongest potential to appeal to domestic and international markets, and generate more revenues in the process? What is required to realise this potential? How can (cross-sector) clusters contribute to this goal?
- _ What is the optimum heritage management model for tourism, and how could it evolve to improve performance? Who can lead and deliver dynamic heritage tourism outcomes?
- _ What heritage tourism development is appropriate for the Northern Ireland brand, and how can it add value and distinctiveness to a developing market positioning?

Key challenges include:

- _ Political leadership – in terms of who 'owns' the nation's heritage locally and nationally, and the national governmental oversight;
- _ Brexit and political uncertainty for a number of years:
- _ Leveraging resources from ongoing, capital, commercial partnership and other channels;
- _ Who and how to facilitate a step-change in planning, standards, research, creativity and quality in provision of interpretation, communication and engagement;
- _ Lack of collective and progressive use of digital channels and technology across all aspects of the offer;
- _ Historical visitor behaviour, which is drawn to the familiarity of the primary heritage and destination hotspots.



Titanic Belfast

SPECIFIC

7. The strategic building blocks

These strategic pillars are not a functional list of heritage product themes, e.g. Belfast, Titanic, Causeway, Coast, Derry-Londonderry, Literary and so on. A mechanical breakdown only reflects back the offer in descriptive terms – this approach seeks to take a more holistic view of how to assess and then enhance the offer.

7.1 MAPPING & LANDSCAPE +

The geographical mapping of Northern Ireland's heritage is comprehensive. However, there is a need to redraw the map from the visitor and potential visitor's perspective. How can we connect the headline attractions with secondary and supporting stories, venues and events, both locally and across the country? What exciting and engaging new narratives can be put in place for campaigns to take advantage of – including peace tourism? How can the 'wraparound' offer of food & drink, and other (outdoor) activities be joined up with the distinctive heritage offer?

This redrawing of the map will reveal and celebrate hidden stories, create surprises, and make new connections. Most importantly it will provide the product and positioning content that will enable Northern Ireland to project itself as distinctive and authentic with an attitude – an edge – that is its own. Not just British, not just Irish, but Northern Irish. GB visitors too often see the offer as too similar

to their own, reducing the reasons to visit. The general (family) market view is of a friendly place to come and relax in, and enjoy the scenery. The impression is one of a lack of new experiences, a lack of vibrancy and excitement.

Landscape is almost a misleading term. As with any part of the offer and how it is developed and taken to market, it has to be a dynamic, living part of the offer. How can culture and heritage animate what would otherwise be static tourism 'wallpaper', albeit often wonderful backdrops that draw visitors in volume?

It is the people through their ideas and activities (from literary to food & drink) that animate the country and create its stories. In this respect, the Causeway Coastal Route can speak about much more than coast and natural history, tapping into the culture of the towns, cities and glens along the way.

7.2 STORYTELLING & ANIMATION +

If the physical heritage assets are the product hardware, then the software that makes everything work is the animation. This includes interpretation, events, and the role of key agencies and organisations working together to tell the stories (existing and emerging) in new ways across destinations. A galvanising and positive directive role for Arts Council Northern Ireland is required in partnership to drive this agenda forward.



Carrickfergus Castle

In other words, connecting the dots for visitors in a way that makes sense, excites and can be easily accessed. By weaving the epic and the 'hidden gem' stories together through the undeniable heritage assets, Northern Ireland's narrative can stand apart as internationally distinctive but also personal – using the country's character and characters to project a vibrant, relevant, fresh and edgy heritage. This can only be achieved by embracing cultural programming alongside interpretation – the literary festival celebration of Samuel Beckett (www.happy-days-enniskillen.com) being a great case in point, which ran until 2015 and continues to inform cultural programming through leading producers like Séan Doran. As The Guardian put it: *"a festival filled with good surprises"*. This is just one indicator of the strategic challenges in embedding consistent, reliable and long-term funding and investment in culture and heritage where it can make a cultural and economic difference.



May B, Maguy Marin Dance Company, Happy Days Festival

There continue to be rich opportunities to respond creatively to ancient and modern heritage without major capital investment. Investment is still required of course, but building new programmes that connect the stories and enable new voices to share and magnify those stories is essential – producers, writers, festivals, artists, consortia. There are too many assets and too much energy to not have a number of 'quick win' options to support with initial investment to make the case for further commitment – both in terms of funds, but as importantly through new partnerships that reflect the needs of the market and what needs to be achieved. In other words, not the usual suspects gathered around the usual table.

These might be new/evolved events, or a response to the European Year of Cultural Heritage 2018, starting the process of transforming heritage (tourism) digital readiness for market, test new bookable product with domestic and international travel trade, or commissioning new writers, photographers and filmmakers to tell the story in a way that responds to a more confident and edgier brand personality. Northern Ireland has to aim to 'punch above its weight' in this respect. It can, starting by giving itself permission to be bolder in how it tells the story. Imagine one of those popular wrist bands – everyone should have one that read: 'WWNID' ('What Would Northern Ireland Do?'). The answer is always something positive, fresh and ambitious.

This report repeatedly and unapologetically talks about distinctiveness. Northern Ireland has it, and by embracing its



VOID DERRY

Horse exhibition, 2015

heritage in new ways it can and will stand apart in a crowded and increasingly international competitive marketplace.

Having great castles is not enough – visitors know they can (and do) get that in Wales. Wonderful and dramatic coastline? Try the *Wild Atlantic Way*, the Pembrokeshire Coast National Park, or the Highlands & Islands of Scotland. And that's without looking further than the UK and ROI. Great local food and chefs – try Cornwall, Cumbria, Dublin. Being good gets visitors, being great gets market share. For heritage, this is the difference between having heritage and having a heritage offer: one that can be taken to market with confidence and expectation of impact.

7.3 PARTNERSHIPS & PLANNING +

The approach must clearly be about fitting the mix of organisations, agencies, authorities and key players into the market imperatives, and not the other way around. There must be no assumption that a starting point for a specific initiative or even a national-level project is to gather every local authority, every relevant government office and agency together around a table. Relevance and meritocracy over bureaucracy and old models is the route to better partnerships. A little democracy is a very good thing, too much and energy and progress can be hindered. By defining the market opportunity and target segments and the resources required, the right partners can be brought together (as opposed to everyone or the 'usual suspects'). That is not to suggest cartels or exclusivity in planning and delivery – simply that to move new ideas into market

reality with finite resources needs dynamic collaborations and not oversized groups that can become 'talking shops' more than 'agents of change'. This has other benefits in that it creates new combinations of partnership, and also suits the 'pilot' model whereby smaller investment can make the case for wider development and adoption, whether that be for a new way of animating a story, campaigning to a key inbound territory, or bringing the digital infrastructure up to date.

Such targeted project initiatives can flow directly from the multiple key strategies recently produced or currently being developed – identifying and responding to what the market wants and where Northern Ireland can respond, if it develops (its product, programme, infrastructure, signposting...). It is easier to say 'yes' when smaller investment is needed, but the cumulative effect can still be massive and will also stimulate larger investments as a result of the new, positive heritage development environment being created and communicated. Communication is key. This requires leadership to not just celebrate what great heritage Northern Ireland has, but what great things it has yet to do with it. Leaders – obvious ones and new voices – must set the tone of this planning and development narrative: focusing on 'the future of heritage, not the history of the past'. A small number of high-profile voices – champions – should be sought out from leading organisations (Historic Royal Palaces, National Trust, Tourism Northern Ireland, National Museums Northern Ireland, Association of Leading Visitor Attractions, HomePlace etc.) to magnify this messaging and lend independent and apolitical credibility.

THINKING NATIONALLY

The Telling the Stories of England campaign, funded as a Discover England project, is aimed at US alumni and affinity markets.

Creating geographic and thematic historical, cultural and countryside tours. New partnerships were developed with two larger travel companies, as well as with cultural and historic specialists.

Revealing some of the many gems currently hidden from the international market is the big opportunity, but it will require a number of targeted efforts that over time will join together to reposition the destination with its target markets. As an emerging tourism destination, the progress in the next 5-10 years could be significant – if the vision is taken forward with clarity and consistency.

7.3.1 The European Year of Cultural Heritage 2018

The European Year of Cultural Heritage 2018 provides Northern Ireland with a platform to exploit new opportunities and secure future legacies. The year can be a window to try new things and test ideas (pilots), challenge existing heritage managers and new contributors to respond creatively. Some of these will be strong enough to extend and roll-out to other places and organisations – legacy.

A key focus should be to generate market insight/feedback in interesting ways (online, on site etc.) to build a better picture of what the market wants and will respond to. In other words, use the Year of Heritage as a laboratory to inform what comes next. This can be programme and product, digital and communications, research and engagement, partnership and collaboration based: trying new things in Enniskillen to roll-out in Derry and so on.

An obvious one is to link to existing new and pending developments to add value, such as the build up to Hillsborough Castle relaunching in 2019, Ulster American Folk Park, Ulster Folk and Transport Museum, The Belfast Story etc.

By mapping the milestones of the developing offer, there can be added creativity in product and service development and ultimately campaign communications. A definitive list of these events, campaigns, anniversaries and launches will provide a good calendar to inform where and when to focus planning and development resources, and therefore where further investment should be sought.

The Heritage Lottery Fund has the ability to invest up to £100,000 (with secured match funding) to deliver bold, quick-win programmes that can then inform future bids, planning and delivery. A lateral view of funding opportunities might also open up funds such as the Big Lottery Fund Empowering Young People programme, which offers awards of £100-600,000.

So for the European Year of Cultural Heritage 2018 it is clear that it is anything but one year, but rather a start point for a renewed approach to heritage tourism and how it tells its fantastic stories over time turning of 'Year of...' into a 'Destination of...', as UNESCO designations seek to do (e.g.

www.youtube.com/watch?v=YYkwObY0blo&t=5s&app=desktop).



“The National Trust looks after 22% of the coastline in Northern Ireland...”

**HEATHER McLACHLAN,
NATIONAL TRUST DIRECTOR
FOR NORTHERN IRELAND**

7.4 STANDARDS & PRACTICE +

The world always seems to want more for less. But the financial cuts since 2008 have been something quite different, and the challenges remain. One way to mitigate the inevitable reductions in core funding is to be creative in planning and partnerships, as has been set out already. Another is to 'raise the bar' for how heritage tourism is managed, and to keep raising the bar at every opportunity. Easier said than done, but necessary all the same in a competitive market that will quickly leave Northern Ireland behind if its programming, animation, communications, branding, packaging, partnerships and infrastructure are below the standards set by its competitors.

Clear, collective and measurable targets need to be set for all initiatives that can create a demonstrable sense of the quality threshold everyone should be aspiring to. Targets are a 'floor' not a 'ceiling', and Northern Ireland must aim to smash expectations by curating amazing visitor experiences that back up the bold, distinctive and confident campaigning and brand messages.

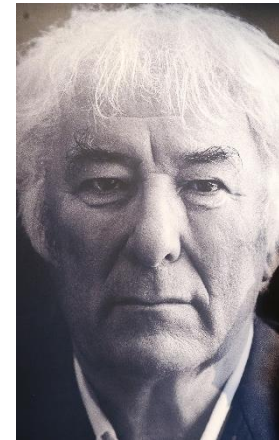
This is not just about the big venues, festivals and projects. It must also be about the wraparound and supporting elements of the offer – transport, hospitality etc. The level of service, welcome, information, accessibility as well as interpretation is essential of course, but it can not just deliver great service, but can tie into the heritage offer. The glens that are part of the Causeway Coastal Route are vital generators of cultural activity, and every possible

touchpoint for visitors needs to get positive and consistent information and content to add value to their visit. It is this that will create the connectivity visitors need to be confident to explore and engage – welcome, service, itineraries, information all part of the story being told.

In raising standards it will be essential to bring in new and challenging perspectives. That can mean familiar faces in new contexts as well as new resources being sourced. This can be a massive positive for planning and resource allocation in the longer-term, and can create a defined sense of ambition and what excellence looks like for heritage tourism.

A number of questions can be set out to inform the industry standards for the future:

- _ What is excellent? What is not? Why?
- _ What is missing (that some competitors may have)?
- _ Do we want that, or should we do it another way?
- _ What would that look like, and how would we recognise it?
- _ How do we maintain excellence and drive this agenda forward?
- _ Who can provide experience of achievement?
- _ Who will challenge us?



“The Ireland I now inhabit is one that these Irish contemporaries have helped to imagine.”

SEAMUS HEANEY

Landscape is a big character
in the nation's story



7.5 STRATEGIC RECOMMENDATIONS

The following are actual outline recommendations which should be taken and developed by any leadership group established.

1. Leadership development model (standards & practice)

Rationale

There is no need for a strategic forum as a 'talking shop', but there is a need for a renewed, shared focus on realising potential initiatives and deliverable projects by key lead agencies/authorities working substantively together, with associate input from independent creative commercial and cultural contributors. This group should aim to set the bar for best practice, mentor that in delivery across the sector and dispassionately identify (timed) opportunities over the next five years, and in a transparent manner.

Next steps

1. Convene a leadership group and develop action-orientated terms of reference and aims for members.
2. Establish leadership development working model for heritage tourism's strategic development, and confirm its authority from government bodies as required to represent the sector.

2. Adoption (standards & practice)

Rationale

Work to get all relevant partners signed-up in principle and in practice (adopted) to the vision that this document and parallel strategies are asserting. This should be through simple, shared terms (memorandum of understanding).

Next steps

1. Following input and adoption of the vision from the leadership group (point 17), this group can represent and widen the conversation as it sees fit across heritage, tourism sectors and associated funders and stakeholders.

"...whilst we know that several major attractions draw visitors to Belfast and that the Causeway Coast and Glens is a clear honeypot, however the market penetration rates for attractions in these areas appear to be lower than for places like Derry & Strabane, Armagh and Lisburn & Castlereagh which suggests that there should be more opportunity to engage tourists with heritage attractions in these areas."

3. Multi-tier heritage asset audit (mapping & landscape)

Rationale

There is a need to more definitely reveal and confirm the more hidden heritage stars, that can then contribute to the wider narrative, the wraparound offer and the itineraries, tours and packages that will follow. This can inform the primary and secondary clusters. This is not a heritage review of every monument, but a heritage tourism review conducted from the perspective of the visitor and potential visitor, e.g. market driven. That is the fundamental criteria, and the heritage/culture tourism leadership group proposed (point 17) should take the lead.

Next steps

1. Conduct a grass roots level heritage tourism asset audit.
2. Cluster by theme, geography, calendar, market segment.
3. Feed into product development and investment discussions.

4. Cultural calendar (mapping & landscape)

Rationale

The cultural heritage calendar, including long-lead anniversaries and opportunities (like European Year of Cultural Heritage 2018, capital project launches) should be compiled (those that are market ready and relevant) to assess what to support and build partnerships around.

Next steps

1. Compile a cultural calendar relevant to heritage stories, themes, venues.
2. Overlay with major heritage dates/anniversaries and milestones, including launches, seasons and festivals.
3. Disseminate and start discussions with culture programmers/producers about themes, events and other opportunities in engaging with heritage.

“What is clear is that whilst relatively small, the current tourism offer attracts a broad visitor demographic albeit that different destinations appeal to different types of visitor.”

“...there should be opportunity to increase the number of families visiting historic properties, visitor/heritage centres, workplaces, country parks and places of worship. Consideration should be given to assessing how family-friendly these sites are currently.”

5. Promote ease of access and navigability (mapping & landscape)

Rationale

The ability to cross the country by car (for public markets), coach (for operators) or motorbike is a message that needs to be promoted more. Northern Ireland is easy to get around. The established routes (e.g. Causeway Coastal, Sperrins) can be supported by new and spur routes and itineraries to connect by theme, event, season and attraction. This will have implications for signage and navigation, so infrastructure will need to be reviewed. This approach should link gateways (Dublin and Belfast, air, road and seaports) to the main routes to leisure spin-offs, notably walking and cycling.

Next steps

1. Commission itinerary research and content, considering opportunities for bookable product.
2. Review potential information upgrade needs online, in print and on route.
3. Create a driving map for proposed routes with times as well as miles for agents/operators.

6. Develop heritage tourism data and insights (mapping & landscape)

Rationale

Tourism market data is strong. How it connects to culture and heritage needs more development, to help to refine market segmentation analysis, which in turn informs cultural programming/animation, interpretation, investment, and marketing campaigns.

Next steps

1. Review required market data insights and finalise gap analysis.
2. Reconfigure/update research and evaluation model to enhance heritage tourism data capture.
3. Apply research reporting directly in strategic planning processes, including key partner insight sharing and planning.



BELLEEK POTTERY

Co. Fermanagh is often described by tour operators and holiday companies as one of the country's best kept secrets. A strong cluster of assets with international appeal is more accurate.

7. Food & drink as key wraparound (mapping & landscape)

Rationale

Northern Irish food & drink is arguably more recognised internationally than its heritage. The recent progress made through the Year of Food and Drink 2016 in particular needs to connect as a key 'wraparound' offer – foodies with heritage and vice versa. This is especially important as the hospitality network connects closely to food & drink (and music), offering a fully-rounded itinerary package. There are quick wins in bringing this content/information together for the benefit of culture and heritage motivated visitors, encouraging heritage venues and attractions to reach out more to engage with their local food & drink offer.

Next steps

1. Compile live (for visits, retail) food & drink offer around heritage tourist clusters.
2. Review Year of Food and Drink 2016 evaluation.
3. Look at opportunities for cross-over programming/event contribution etc.



NEW GENERATION TOURS

Walking and taxi tours enable contemporary stories to connect with established heritage and tourism confidently, to bring destinations to life for new audiences.. Image: Seedhead Street Art Walking Tour

8. Thematic approach to bookable product (storytelling & animation)

Rationale

Taking the wider groundwork forward, and using the cross-sector and territory themes – from literary, coast and Game of Thrones to less prominent ones like industrial and maritime – the approach should embed new ways of working to harness and promote these stories.

Themes remain important, as noted throughout this report. There is a tiered approach for this way of presenting the stories of the nation – not everything is Titanic, Giant's Causeway, the Walled City and Game of Thrones – even for the international markets there is much more from screen (film & TV), literature, music etc. What needs to be pre-booked, what can be self-led, e.g. variants of a Game of Thrones driving tour?

Next steps

1. Research and map potential bookable product programmes thematically, by market (general, by territory or specialist). Engage with cultural animateurs, like Kabosh, Big Telly Theatre Cos. for idea generation
2. Engage with key travel trade operators to test ideas and packages, including targeting, timing, pricing.

9. Tourism Northern Ireland communications coordination/lead (storytelling & animation)

Rationale

Tourism Northern Ireland must be a catalyst agency to drive the heritage tourism case (for investment) forward. It is both an opportunity and a core function to lead, bring together the right partners at the right time for each output/programme, and communicate clearly to ensure that the wider heritage and tourism community feel involved at all times. The consultations to date suggest that a shared agenda exists, but a simple communications plan should be put in place. Not every heritage attraction, not every local authority at this stage will be a priority player for all heritage tourism activity. That is not to say that all heritage players will not have roles over time – they will.

Next steps

1. Develop a sector communications plan to create regular information and discussion based communications channels and platforms to share ideas, news and invite input, linking to action-based groups delivering planned outputs.

“Both these [air and seaport] markets offer potential to increase heritage tourism to lesser known attractions.”

“The findings suggest that there could be a year-round demand for heritage related tourism (provided supply is also available year-round) and that there should be opportunity to increase provision, awareness and interest in off-season activities and activities that are not weather dependent.”

10. Set the narrative (storytelling & animation)

Rationale

Getting the overarching narrative right is critical, to then deliver with consistency and purpose. The story that Northern Ireland tells must adhere to the emerging brand proposition, which will be structured in a way to be flexible rather than constraining, through product development and campaigns.

Next steps

1. Review and align this report with the pending nationwide brand proposition and competitive positioning statement.
2. Establish and disseminate a series of key messages for heritage tourism for sector adoption, being prepared to invest in that initial process (events, collateral).
3. Ensure briefs for brand-related outputs are based on the above.

11. Peace tourism (storytelling & animation)

Rationale

There is evidence of international demand, from the academic to the general visitor – for a peace tourism offer, although the delicate political landscape remains a threat to investment and how the story is told. This is urgent and important, and should not be ignored or deferred. Time will only see more assets and stories lost. There needs to be a specific action plan for this most powerful of subject areas, and consultation could be given to an independent lead (as was the case in South Africa) to take it forward.

Next steps

1. Establish a consensus at policy-making level of the value of pursuing this offer in terms of tourism, place-making and wider image-making – as part of advocacy activities.
2. Commission a specific strategy and action plan to develop a coherent heritage tourism and investment plan.

“...in Greater Belfast and Armagh we might conclude that there is a need to increase the distinctiveness of museums & galleries and/or the stories they tell and similarly for heritage sites in Strangford Lough and Fermanagh Lakelands. Opportunities to develop stronger connections between outdoor activities/parks & gardens and heritage in The Mourne, Causeway Coast & Glens & Lough Neagh should also be considered to engage more visitors in heritage activities in these areas and further encourage them to extend their stays, return & recommend to others.”

12. Leverage the diaspora (storytelling & animation)

Rationale

For a small nation, Northern Ireland has exported a disproportionately large cultural impact through its diaspora. The Republic of Ireland has had great success in turning this into tourism markets, notably North American, through the growing interest in genealogy. More can be done together to further grow this market. This offer, and how to articulate it, can build on impressive assets, including the Public Records Office of Northern Ireland, Ulster American Folk Park. The packaging of this naturally suggests the use of internationally famous sons and daughters of Northern Ireland – Rory McIlroy, Kenneth Branagh, Jamie Dornan, Michelle Fairley, Liam Neeson... – England, Wales, and Britain think nothing of using Dame Judi Dench, Luke Evans, Rhod Gilbert, David Harewood, Stephen Fry...

Next steps

1. Compile market data to quantify the target markets.
2. Apply the narrative for this market, drawing on evocative themes and stories.
3. Develop a campaign based on the quantified market potential.

13. Use heritage, culture and people in brand and place-making (storytelling & animation)

Rationale

Northern Ireland offers a warm welcome, but with a sharp personality rather than stereotype. It is not however necessarily tourism-ready everywhere. The opportunity is to build a fresh, contemporary take on the warm welcoming personality of the nation through what it does, what it says, and placing that in a cultural and historical context. Place-making brand messages will be at the heart of the welcome that attractions, transport providers, hospitality providers and others present.

Next steps

1. Review training programmes to date, e.g. World Host, as a foundation,
2. Then develop a new standards-led approach/module.



AUTUMN IS COMING

Visit London's (London & Partners) recent international travel trade campaign film, featuring stage and screen actor David Harewood, to promote the autumn culture and heritage offer across the world's cultural city.

14. Advocacy plan (partnerships & planning)

Rationale

To address the lack of unity and continuity in political leadership, proactive and structured advocacy over time is essential. This should engage government ministers and their advisors (cross-departmental – economic, health & wellbeing, tourism & leisure, communities etc.), and also director-level with key agencies, local authorities, and private sector heritage owners. The aim is to build awareness of the value of heritage and then support for prioritising heritage as a long-term positive investment. Extending this activity, the value of tourism to the heritage sector – revenue generation, job creation, new partnerships and initiatives, profile raising, new market opportunities – can be more forcefully and consistently made within and outwith the sector, including a small number of ambassadors (e.g. Loyd Grossman Campaign for Museums, Heritage Alliance).

Next steps

1. Commission an advocacy action plan, to track and develop key individual and organisational relationships over time.

15. Private sector engagement (partnerships & planning)

Rationale

As a specific element of the advocacy work, the private sector (non-heritage, but relevant stakeholders in tourism, place-making and economic development) need to be engaged where possible in the development process – but only once some of the groundwork has been done and a vision and routes for the private sector to engage can be fully articulated.

Next steps

1. Research examples, both domestic and international, of commercial partnerships with heritage and heritage development for tourism and international markets.
2. Curate and facilitate a series of public/private sector workshops to engage the private sector (potential partners and investors)

“...whilst we know that several major attractions draw visitors to Belfast and that the Causeway Coast and Glens is a clear honeypot, however the market penetration rates for attractions in these areas appear to be lower than for places like Derry & Strabane, Armagh and Lisburn & Castlereagh which suggests that there should be more opportunity to engage tourists with heritage attractions in these areas.”

16. Develop new product and itineraries that cross-cut (storytelling & animation)

Rationale

More work is required to maximise market reach and penetration through exploiting the right communications via the right channels at the right time, with the right packages – trails & tours, itineraries, branded product (e.g. equivalent to the *Wild Atlantic Way*). Timely product development requires the main agencies to look at the funding portfolio to identify and encourage projects/bids that reflect the priority areas for support. This might develop into specific funds, similar to Cultural Destinations (Arts Council England and Visit England), Great Place (Arts Council England, Historic England and Heritage Lottery Fund), and Discover England (Visit Britain).

Next steps

1. Research UK/international comparator destinations and heritage tourism offers to inform specific venues/clusters/projects with funding or identified potential to develop heritage tourism markets.
2. Commission and pilot itineraries in consultation with travel trade/tour operators.
3. Develop wider portfolio of content-based product for online, self-guided and bookable product launch, in phases to include performance review.

“...those travelling between destinations tend to either do so on the east side or west side of the region with few traversing it. This will have clear implications for the types of itineraries and packages that are likely to appeal.”

“With the possible exceptions of Derry/Londonderry and the Causeway Coast the findings suggest that destinations don't really have a very distinct personality or USP.”

17. Investment priority setting (partnerships & planning)

Rationale

A mature dialogue is required, as part of the leadership group, bringing government, lead agencies and funders (including Heritage Lottery Fund) together to identify priority investment areas and themes, who should lead and what level of ambition (and therefore investment) is required. This can set out major and minor programmes to address gaps in the market and underperforming heritage assets. This includes the non-Titanic Belfast offer and how the city connects with the Titanic Quarter and the River Lagan; the Causeway Coastal Route; Carrickfergus Castle; Enniskillen/Fermanagh cluster; Derry and Strabane (post UK City of Culture 2013 and its untapped legacy).

Next steps

1. Convene a senior management group to discuss this report and set the forward agenda and mechanism to develop and deliver a national action plan for heritage tourism development.
2. Further outcomes will be subject to the above.



BELFAST INTERNATIONAL ARTS FESTIVAL

How can dynamic cultural programmers respond to the heritage assets around them, as well as the cultural traditions? Artist: Taylor Mac

8. The route map

8.1 A MANIFESTO IN PRACTICE

Decide the approach you want to take. More than one viable route exists, in addition to the status quo. Be realistic. You can be ambitious and aspirational, and Northern Ireland's heritage tourism should be just that.

Make it your own. Develop a genuine heritage tourism strategy (in which culture has to have a leading role to secure credibility and distinctiveness if it is to be more than an events/interpretation strategy). What does it really mean to see/deliver/produce/participate in culturally exciting heritage tourism work in Northern Ireland? Emerging strengths and interests that can be embedded within the country's strategies and masterplanning include literary, landscape, festivals, peace.

Be holistic. Who has the overview and who is best placed to make cross sector partnerships happen (heritage + culture + tourism + inward investment + place marketing.) The obvious answer seems to be Tourism Northern Ireland, but with active core partners to build a sustainable partnership model and not a centrist initiative with the sole burden of leadership and development falling to one agency.

Look behind you...

- a. To national institutions and dynamic smaller players for partnership – not necessarily the usual suspects.
- b. From the coast to the towns/cities to the country. Hold on to what you are. It is a very distinctive offer.

Focus on the long-term, not just short-term.

- a. Put away (for now) the temptation to play at being producers and commission lots of new events and programmes to animate heritage assets. Make the ones you have already as good as they can be, allowing new players to provide fresh perspectives on established narratives and assets – piloting and testing good practice to then roll-out when risks have been reduced. A phased approach to development is realistic, but not over-cautious.
- b. Some new events/products will emerge naturally. Be ready to support a good idea, looking for those that are market aware/driven. More than that, heritage venues and attractions need to be seen as ready and proactive partners in the development of new cultural heritage product offers and packages.

Seize the game changer moments. Northern Ireland's tourism is young, but with some well-defined major attractions – these are amongst your quick wins. So, put immediate energies into making



Giant's Causeway, the heart of the Causeway Coastal Route

these the best they can be, leveraging them for all they are worth:

- a. The Causeway Coast – where a model already exists to improve on;
- b. Belfast – an international city with all the attributes needed and signature attractions, notably the Titanic Quarter;
- c. Derry – which can regain its 2013 ‘mojo’ through new channels and initiatives – Coastal Causeway, Game of Thrones etc. – as well as a home for cultural events and happenings in a heritage setting;
- d. Literature and the landscape – with a distinctive Northern Irish edge – Heaney, Beckett, festivals etc.
- e. Peace – take an embracing ownership of the story. What should Northern Ireland’s own approach be (as opposed to Balkans, Berlin, South Africa etc.) to tell the story from all angles, including the communities and their voices.

Lead. Underpin and stabilise some loose foundations.

- a. Supply support and leadership to the key institutions and agencies.
- b. Build up digital skills through key agencies, but also as a destination.
- c. Build heritage/cultural tourism ambassadors and visibility.
- d. Build up engaging interpretation of key heritage and natural assets.
- e. Build in this distinctiveness into campaign development and the positioning that underpins all communications.

Be connected. Finally, be the joined-up place you want to be – cross promote and collaborate across heritage, culture and tourism.

- a. Information / knowledge
- b. Toolkits and resources, shared narratives, imagery, calendars



BELFAST CITY HALL

Belfast may be a secondary route to Dublin, but is growing and leads the offer as a hub destination

December 2017

