Culture and Heritage Insights

TOURISM NORTHERN IRELAND

Introduction and Overview

This report provides our tourism partners with access to the latest insights, trends and opportunities for Culture and Heritage tourism. It outlines current international Cultural and Heritage tourism trends and an overview of current activity and emerging opportunities within visitor attractions and visitor experiences. An overview of our domestic and international visitors highlights what visitors are interested in and most likely to engage with from a product and experience perspective.

It outlines a series of opportunities for our tourism industry to consider in the context of developing the Culture and Heritage product across the destination. This includes optimising existing products and exploring opportunities to develop a new portfolio of visitor experiences. A situational analysis has been undertaken to provide additional context for product development. It ensures we maximise our strengths, address key challenges and explore the many development opportunities that exist for Culture and Heritage tourism in Northern Ireland.

For a broader market context, please visit Tourism Northern Ireland's Consumer Sentiment Report section https://www.tourismni.com/research-insights/consumer-sentiment-analysis/ - which features an in depth analysis on consumer confidence, propensity to travel and consumer concerns.

SECTION 1

Understanding Trends – Culture & Heritage

Understanding Trends

Cultural & Heritage tourists want to enrich their lives with new experiences while learning about the destination, its people, history and heritage. They tend to be well-educated and higher than average earners. They consist predominantly of the Baby Boomer consumer group, experienced travellers, cash and time rich, and Generation X and the Millennial consumer groups who are more discerning travel groups demanding of unique, authentic experiences that are characteristic of cultural and heritage tourism[1].

The role of Heritage and Culture is to deliver on the promise of emotional connections, where the visitor experiences are different and distinct from everyday life. Culture & Heritage provide emotional impact, immersion and different experiences to learn about the place and the people themselves[2].

Global trends reflect visitors pursue authentic, immersive experiences and combining fun with learning opportunities. Recent Visit Great Britain research highlights two important trends of *(1)* "The Pursuit of Real" - experiencing genuine, authentic tourism products preferred by tourists as they seek to experience their chosen destination like a local and *(2)* "The Leisure Upgrade" skill seeking visitors preferring tourism products that combine fun with an opportunity to learn. To maximise the opportunity of experiential activities and strengthening the opportunity, experiences need to: be viewed as authentic and unique, provide for the creation of distinctive memories to both remember and share, provide cultural or historic immersion building a personal connection to the place and people and provide a challenge doing something different to what they can do at home[3].

1 https://www.cbi.eu/market-information/tourism/cultural-tourism/market-entry
2 Visit Britain – Inbound Culture Heritage & Attractions Research
3 www.visitbritain.org/experiential-activity-research

International Tourism Trends – Culture & Heritage Context

Cultural Tourism: 2023 will see travellers wanting more meaningful and memorable holidays and as a result one the biggest travel trends for 2023 will be adventure and cultural experiences[4].

Attendances for 'in-person' arts and heritage has risen since Spring 2022, from **70%** to **90%** with Arts, culture and heritage attendances rising to **90%** among respondents to the Audience Agency surveys. Film and museums/heritage proving especially popular, particularly with families[5].

Sustainable Tourism: Sustainable travel is the prevailing 2023 tourism trend [6]. This social movement is increasing people power requiring destinations, visitor attractions and experiences to enhance their guest/visitor experiences from a sustainable perspective[7].

Conscious Consumers: Not only are consumers looking for value for money, they are also looking to buy from companies with the same values as them namely, sustainability and the protection of natural resources. Attractions need to show value and proof of green credentials.

Rural Tourism: Rural travel will continue to increase in 2023 with almost **50%** of travellers wanting to have a more "back-to-basics" feel and indications are that travellers are increasingly seeking a combination of city and nature vacation destinations[8]. This trend affords urban and rural experiences to cross promote and refer.

Accommodation: According to American Express Global Business Travel (Amex GBT), hotel chain rates will continue to increase[9]. Consequently short-term rental market

4 Oroko Travel MD Brendan Breen
5 https://www.theaudienceagency.org/evidence/covid-19-cultural-participation-monitor/recent-key-insights
6 Travel Age https://www.travelagewest.com/Industry-Insight/Opinion/sustainable-travel-2022-virtuoso-survey
7 Katapult What's in store for the attraction industry trends in 2023
8 Travel Daily 7 Significant Travel Trends to expect in 2023 https://www.traveldailymedia.com/7-significant-travel-trends-to-expect-in-2023/
9 Business Travel News https://www.businesstravelnews.com/Procurement/Amex-GBT-2023-Hotel-Prices-to-Rise-Again-but-Pace-to-Slow#:~:text=Hotel%20rates%20worldwide%20will%20increase,Business%20Travel%20report%2C%20released%20Wednesday

will experience growth with visitors preferring short-term rentals over big chain hotels[10]. This trend will see visitors staying longer in one area affording attractions the opportunity to generate reasons for repeat visits.

Technology: As technology continues to advance combined with a broadening range of attraction options, the customer experience is vital, everything from the website interaction down to the very last interaction at an attraction now needs to be as enjoyable as possible. For attractions customer experience can be enhanced by inclusion of Augmented Reality (AR) and Virtual Reality (VR).

Personalisation: can apply to every aspect of the tourist experience. Today's consumers expect experiences that closely match their personal preferences, from destinations to accommodation and the type of activities they will engage in[11].

Local vs Global: Many consumers are increasingly visiting local , taking more staycations and supporting local leading to a higher proportion of cultural and heritage visitors to attractions and experiences from local/ domestic audiences[12].

Culture, Heritage & Visitor Attractions Trends

Sustainability: A growing number of consumers, while looking for value for money, are also looking to engage with experiences with the same values as them - sustainability and the protection of natural resources being one example. Attractions now need to show value for their visitor and also proof of their green credentials. This concern for the environment is growing particularly for Generation Z who want to see evidence of interventions such as electric charging stations, solar use, recycling, the elimination of single-use plastics, and eco-friendly LED lighting. As interest in plant-based eating continues to grow visitors are increasingly looking for sustainable food options at attractions. Visitors value initiatives to promote climate action at visitor attractions.

10 Travel Media https://www.traveldailymedia.com/7-significant-travel-trends-to-expect-in-2023/
11 Revfine: Discover the Latest Trends in the Tourism Industry
12 Katapult What's in store for the attraction industry trends in 2023

The increased focus on sustainability also includes protecting cultural heritage and providing benefits for the local community. Visitor attractions can support the local community by becoming an outlet for local artisans selling products made in the community, having on-site food outlets using regional and seasonal produce when possible, protecting natural habitats, capturing rainfall for irrigation, and composting. Visitors want to see attractions clearly explaining and being transparent about their sustainable practices and their efforts to connect with visitors and the local community.

Authentic, untouched experiences: The trend to visit destinations untouched by commercialisation is resulting in emerging cultural neighbourhoods, towns and villages becoming more popular in 2023. Consumers are demanding more value, new experiences and authenticity. Visitor attractions must communicate how their attraction delivers unique experiences for their visitors.

Hands on experimentation: More and more consumers want to try new experiences and to learn new things requiring visitor attractions offering new and immersive experiences that visitors can sample at home.

Local Experiences: Visitors want to engage with, and participate in the local culture by engaging in traditional cultural activities. Local community and cultural experiences are set to feature among the top tourism trends in 2023[13].

Respite Zones: A growing number of people are reviewing their tech usage and are looking for wellness offerings especially post Covid-19. A break from high intensity immersion, visitors want a calming area to recollect and recover yet not miss out on exciting experiences[14]. Global travellers are increasingly seeking respite zones as features of visitor attractions.

Technology: An increasing number of visitors now expect more than an 'Insta-grammable' moment and are looking to be immersed and actively engaged in their experiences. Attractions must be innovative around trend-setting experiences to entice guests to visit in 2023[15]. Technologies such as AR, VR and robots are helping attractions to achieve this but its also important for attractions to balance technology with human interaction.

Immersion, captivating and memorable experiences: Many visitors want to play an active role and be immersed in an experience. Technology such as Layered Reality technique combines digital technology, live theatre and real physical sensations to create a uniquely captivating and memorable experience. Attractions need to ensure the experience they offer fully immerses the audience to create a truly memorable experience.

Artainment, immersive art experiences: Artainment is the fusion of art and technology, or art and entertainment. It is a trend that is essentially art being displayed in new ways and generally incorporating digital.

Competitive socialising – the trend for technology driven sports at visitor attractions. This trend sees visitor attractions including competitive socialising through technology games and competition on site.

Horror Experiences, haunted houses and eerie IP continue to be key visitor attractions trend: Eerie and horror attractions continue to feature as a key trend in the visitor attractions sector offering opportunities for innovation in the night time economy.

Accessibility and Inclusivity: Making sure that visitor attractions and experiences are accessible is a key requirement. Visitor attractions need to be inclusive, accessible and providing facilities for everyone.

Connect and re-connect: Extended / multigenerational families and friends are connecting or reconnecting with visitors and prioritizing experiences that the entire family can engage in for connection.

13 Revfine: Discover the Latest Trends in the Tourism Industry https://www.revfine.com/tourism-trends/#why-important
14 Katapult What's in store for the attraction industry trends in 2023
15 15 trends for visitor attractions - Blooloop

SECTION 2

Understanding the Visitor

Culture & Heritage Visitors - What they want

Immersion

There are a number of Visitors that want to be immersed in Northern Ireland's landscape, its nature and in particular coastal areas. They seek different ways of viewing nature as they desire multi-sensory experiences embracing all of their senses providing connection and emotional engagement with enriching opportunities to a get a new perspective. They also want conservation and preservation of the environment and natural assets.

Connection

More and more visitors want to feel connected with the place, people and culture of Northern Ireland. They seek to experience authentic culture, learn the stories of its people, their changing lives and reflect on shared ancestry and heritage. They enjoy when such experiences are brought to life through music and song. Otherwise they look for innovation and differentiation in these experiences using the creativity offered by modern state of the art immersive digital technology

Understanding

A growing number of consumers want to understand the historic stories that shaped the place and discover what life was like, hear unique stories and get the real perspectives. To fully understand, they want to be immersed in the past, history, heritage and traditions of the place through genuinely Northern Irish experiences offering, fun, folkloric entertainment using storytelling, interpretation and animation.

Unique Urban Experiences

The number of visitors that like distinctive towns and cities has grown. They enjoy leisurely exploring the urban environment. attractions, architecture and shopping, tours and city walking trails. They like to have plenty to do day and night, public realm is important and they like to engage with the locals and having access to the nearby countryside.

Touring Routes

A significant proportion of visitors like touring particularly, coastal routes, connecting places of interest and things to see and do. They enjoy charming seaside towns, historic villages, iconic scenery and lots of interesting places to explore along the way. While touring they enjoy stunning scenery savouring the natural beauty, wildlife and biodiversity of the route. Overarching connecting themes, key experiences, established stops for relaxation, refreshments and entertainment and providing a sense of place are crucial to the success of routes.

Active in the Great Outdoors

Being active in the outdoors or exploring the countryside is enjoyed by a large number of visitors.. A variety of land and water-based activities catering for different fitness levels and ages provide opportunities for creative and differentiated outdoor experiences. Adventure, freedom, self-discovery, learning new skills as well as opportunities to enjoy the landscape, learn about the local history and culture are important aspects of the active in nature offering.

Events and Festivals

An increasing number of visitors want culturally credible festivals and events to provide immersion into the local culture, traditions, people and stories, brought to life through music, food, street theatre and spectacular light shows. Festivals and events provide opportunities for; visitors to feel like one of the locals, convey the spirit of the local community, its culture and traditions. Visitors like unusual performances in unique venues and public disruption performances. They like to get behind the scenes to discover how it's made and get hands-on.

Food and Hospitality

Food and drink are a key part of the overall tourism experience for Northern Ireland. Visitors like to try food and drink that they can't get elsewhere, local delicacies traditional and farmhouse recipes. Food Tourists have high expectations from other destinations but they do enjoy experiencing the authentic local food scene, meeting the producers and being connected to the destination's traditions and people. Important to keep in mind that not everyone is into experiences that are alcohol based.

Wellness and Self Discovery

Many visitors like restoration, serenity and the chance to unplug and rewind to re-awaken the senses and uplift the spirit. Unplugging presents opportunities for cultural discovery, the opportunity to have a unique local experience or learn a new skill from the locals, which engages the senses without overloading them.

Comfort and Safety

Delivering strong experiential and immersive experiences, both the visitor and the experiences/ attractions require supporting infrastructure. Infrastructural support contributes greatly to visitor's enjoyment and support the ambience, character and unique quality of the experience sense of place, its physical comfort, convenience, safety for the orientation of the visitor.

Understanding Our Visitors Profile

Most Important Reasons for Visiting NI[16]	%
To visit a specific attraction	30%
To see beautiful scenery / landscapes	21%
To explore the history and culture of Northern Ireland	13%
To visit friends or relatives	9%
To see a particular city/town/village	5%
Have been to Northern Ireland before and want to return	5%
Some other reason	16%

Ratings of Things to See & Do in NI (out of 10)	Rating
A range of interesting/enjoyable things to see/do in the area	8.2
Unique things to do and see that reflect the area's local culture	8.12
The range of outdoor activities	7.8
Somewhere you could meet and mix with the local people	7.54
Shopping opportunities	7.16
Opportunities to attend local events/festivals	6.91

16 https://www.tourismni.com/globalassets/industry-insights/visitor-attitude-survey/vas-ni-fact-card-2018.pdf (Source: VAS 2018 Final Northern Ireland Fact Card)

Ratings of Attractions in NI (out of 10)	Rating
Friendly staff at the attractions	8.8
Professional and efficient staff at attractions	8.56
A range of interesting/enjoyable visitor attractions	8.34
Quality of interpretation and storytelling at museums/visitor centres in area	8.27
Value for money of attractions (historic sites, museums, visitor centres etc.)	7.95
Information at visitor attractions in your own language (mainland European, Rest of World visitors)	5.8

Things Seen and Done	%
Visited a castle/other historic monument	45%
Visited a forest, park or garden	44%
Visited a pub	38%
Visited a museum or art gallery	32%
Went shopping	27%
Visited a beach	24%
Visited a visitor/interpretation centre	24%
Took a guided tour	23%

Visitors from the Republic of Ireland (ROI)

1. Visitors from ROI like to be connected to past events through shared stories of ancestry and heritage, particularly poignant personal and intriguing stories, they don't enjoy dark or depressing stories and some content may make them feel uncomfortable.
2. They enjoy short getaway urban experiences that offer a 'buzz' while they leisurely explore the city's attractions, historical and cultural activities and entertainment. They also enjoy locally produced food and beverages, night-time activities and attractions that offer different night-time experiences to those during the day.
3. ROI visitors want short breaks for relaxation, to unplug in splendid isolation, enjoying immersive experiences close to nature. They can negatively view promises of different ways of engaging with wildlife.
4. They like opportunities to explore the outdoors, relax in fresh air while realising their sense of adventure, but some do not like niche adventure, challenging walks unless infused with cultural offerings.
5. They enjoy experiencing fun folkloric entertainment about myths legends and stories that are presented in a modern innovative and creative manner and different to ROI experiences.
6. They enjoy music food and drink festivals, artisan markets once not too niche or 'artsy'.

Recent research shows that from a knowledge point of view, ROI consumers fall into three categories.

1. Those who have little knowledge and limited experience of Northern Ireland. For these consumers the past dominates thinking and perceptions. These people are quite unsure of what's actually offered and available for short breaks in Northern Ireland.
2. Those who are building knowledge. These people are in the process of building a new understanding of what Northern Ireland has to offer. They are focused on hero attractions. Communications are starting to cut through, and interest in considering and exploring options for short breaks is starting to be piqued and moving towards active investigation.
3. Those with knowledge and experience of Northern Ireland. These people feel as if they have discovered something others are yet to realise, and they feel quite special and think they are leading the way in this regard[17].

17 Republic of Ireland Market Strategy 2021 - 2026

Visitors from Great Britain

70% of British visitors visit sites of historical interest, **70%** engaged in pastimes/events and **33%** participated in activities.

1. Visitors from Great Britain want to learn about the destination through attractions and guided tours but the experience must be authentic with differentiation to reveal the real NI and its uniqueness in relation to the rest of Ireland and Great Britain.
2. British visitors like new, surprising perspectives on history, historic events and culturally significant stories. However the experiences must be relevant to them and packaged as an interactive and imaginative visually exciting entertainment. They may not be particularly fond of religion, upsetting subjects such as war and conflict.
3. They enjoy being close to nature with a feeling of freedom, enjoying relaxed walking experiences that are not too remote with frequent exploring diversions such as quaint towns, villages, castles, ruins on the route.
4. They enjoy more urban environments, beautiful settings with opportunities to enjoy architecture and cultural heritage in a relaxed manner, they will enjoy the countryside if easily accessible but they also want lots to do at night.
5. They like ancient historic mystical sites and landscapes, castles, churches and historic properties with ornamental gardens but these experiences need to be different from their home - some find religion off-putting.
6. They enjoy driving routes with stunning scenery, natural beauty with natural wildlife and biodiversity and they also want a range of things to see and do at a leisurely pace.

British visitors engage in

Cultural & Heritage

- 41% Heritage/Visitor Centres
- 33% Historic Houses/Castles
- 35% Churches and Cathedrals
- 28% Monuments
- 30% Museums/ Galleries
- 22% Other

Interests and Events

- 28% Visit National Parks & Forests
- 23% Gardens
- 43% Shopping
- 15% Festivals and Events
- 2% Genealogy

Activities

- 14% Hiking/Cross Country Walking
- 4% Golf
- 3% Cycling
- 1% Equestrian
- 2% Water Based Activities
- 2% Fishing
- 2% Attending Sports Events

Visitors from the USA

1. Americans like driving to explore interesting places, historic towns and villages, but need to have lots to see and do or an iconic attraction along the route.
2. American visitors like ancient sites, historic properties, stately homes and gardens and architecture, History doesn't really appeal to this market but human - interest stories or an iconic Irish story more than history interest them.
3. They like easy short distance but scenic walking trails that facilitate their learning about local history, culture and monuments/buildings.
4. They like events that bring history and its stories to life but prefer authenticity, less busy or touristy spots.
5. They enjoy experiences that link to Irish history or have an 'Irishness' about them, they are not particularly interested in religion.
6. American visitors like to absorb the history, atmosphere and 'culture' of Ireland through attractions, architecture, towns and villages, as well as local pubs and cafes but are not particularly interested in high culture such as museum experiences that are too long, opera or literature.
7. They like having a variety and wide range of things to do to make the most of their overseas trips, packing as much as they can into the trip and not staying too long in any one place.
8. American tourists like to enjoy local foods and hospitality, they don't associate food tourism with Ireland so need to be assured that the offering matches their standards and requirements.
9. Americans like opportunities to relax, enjoy landscape, picturesque views and immersion in nature but don't like extremes. Coastal, island and water-based experiences including bio-diversity, wild and marine life need to be easily accessible and not too strenuous to explore.
10. They enjoy driving routes with interesting places to explore such as seaside towns, historic villages with lots to see and do including iconic attractions or scenery on the routes.

American visitors engage in

Cultural & Heritage

- 79% Heritage/ Visitor Centres
- 78% Historic Houses/ Castles
- 7% Churches and Cathedrals
- 58% Monuments
- 49% Museums/ Galleries
- 48% Ancient Sites

Interests and Events

- 64% Visit National Parks & Forests
- 49% Gardens
- 49% Shopping
- 9% Festivals and Events
- 5% Genealogy

Activities

- 36% Hiking/ Cross Country Walking
- 4% Golf
- 3% Cycling
- 2% Equestrian
- 2% Water Based Activities

Visitors from Germany

1. They enjoy discovering the real, original, authentic local history and culture and connecting with the people, the place, its history, traditions and local produce/ cuisine, but authenticity is crucial to the German visitor.
2. Innovative experiences through modern, state-of the art, immersive digital technology, VR, light shows/projections, interactive galleries and modern 21st century architecture have great appeal for German visitors and they enjoy visiting castles and historic buildings once they are not too busy with other tourists.
3. They want to be immersed into the past, discovering what life was like and walking in the historic footsteps of others. They are not however interested in experiences relating to conflict, tragedy or war.
4. They enjoy festivals including artisan craft, food festivals and markets, Irish bars, street theatre, music, Victorian markets, Cathedral Quarter and music performances. There is a cohort that do not like festivals wholly on food, particularly alcohol and they do not like experiences busy with tourists.
5. Germans enjoy exploring historic cities learning about its people and stories. They like to experience something different that they cannot access at home and really enjoy urban experiences offering easy access to nearby landscapes.
6. German visitors like having freedom, being active in the outdoors, enjoying peaceful locations, coastal locations but some find tranquillity boring and the weather can be a concern for them.
7. They like to have all their senses really engaged, getting a different perspective by untouched nature, wildlife and the tranquillity around that, they are concerned about the environment and biodiversity and visitors in numbers spoiling the experience.
8. German tourists have some interest in monastic ruins mythical experiences, night-time experiences with illuminations, they have little interest in religious or literary themes that they are not familiar with.
9. An important part of any visit for the German visitor is to eat local foods, relax and enjoy refreshments in unique atmospheric settings, they enjoy including music in these experiences.

German visitors engage in

Cultural & Heritage	Interests and Events	Activities
61% Heritage/ Visitor Centres	64% Visit National Parks & Forests	42% Hiking/ Cross Country Walking
60% Historic Houses/ Castles	49% Gardens	1% Golf
65% Churches and Cathedrals	49% Shopping	1% Equestrian
49% Monuments	9% Festivals and Events	1% Fishing
39% Museums/ Galleries	5% Genealogy	4% Water Activities
32% Ancient Sites		4% Cycling

Visitors from France

1. French visitors like to immerse themselves in the unique stories of history, heritage, traditions, folklore and culture - genuine, authentic Irish experiences through a modern innovative technological method to re-package history, authentic stories but not conflict related.
2. They like unplugging from the urban & digital worlds, self-discovery, restoration and escaping it all to an island or a long walk in the countryside - walks should have discovery points with more a spiritual than religious experiences. Weather may be problematic.
3. They enjoy immersion in nature, flora, fauna, wildlife and particularly marine life. They like iconic landscapes and views - seeing a different perspective - tree tops, waves etc. While they want freedom to explore, they are not particularly fond of being over-active and prefer nature & spacious environments to managed walks.
4. French visitors do like to be ensconced in the local food scenes ranging from Michelin starred, cocktail lounges, artisan markets to food enjoyed in beautiful scenic settings and fresh air. Coming from France they have high expectations.
5. They like creativity - they are interest in quality authentic artisan arts, cultural festivals, contemporary/fine art, light installations, energetic cities, Georgian to modern architecture but these must work to enhance not detract from the landscape and storytelling.
6. They want authentic Northern Irish Stories while enjoying imaginative excursions into the past, the intrigue of Celtic mythology, maritime history, medieval fortress stories and stepping into others shoes to get the real perspective.
7. They enjoy festivals including artisan craft, food festivals and markets, Irish bars, street theatre, music, Victorian markets, Cathedral Quarter and music performances. There is a cohort that do not like festivals wholly on food, particularly alcohol and they do not like experiences busy with tourists.

French visitors engage in

Cultural & Heritage

- 61% Heritage/ Visitor Centres
- 60% Historic Houses/Castles
- 65% Churches and Cathedrals
- 49% Monuments
- 39% Museums/ Galleries
- 32% Ancient Sites

Interests and Events

- 64% Visit National Parks & Forests
- 49% Gardens
- 49% Shopping
- 9% Festivals and Events
- 5% Genealogy

Activities

- 42% Hiking/ Cross Country Walking
- 4% Water Activities
- 4% Cycling
- 1% Golf
- 1% Equestrian
- 1% Fishing

Visitor Segments

Republic of Ireland Visitor Segments

Visitors from the Republic of Ireland are looking for offerings including a range of activities, great nightlife, unique experiences[18]. They have a great interest in the outdoors and engaging in activities and 'family' is a defining characteristic within the segments.

Motivations: 34% of visitors from the ROI visit Northern Ireland for escapism, **33%** for relaxation and **31%** for the opportunity to discover new parts of NI. Escapism is now the dominant holiday motivator, closely followed by the desire for relaxing/unwinding getaways and to enjoy or discover a new part of NI not previously visited, while **20%** want to try something new.

Almost **50%** of visitors planning to visit Northern Ireland would like to experience coastal and countryside breaks which accurately reflects this segments desire for a relaxing trip offering some escapism. A city break in Northern Ireland is also popular [19].

Demographics: Almost **45%** of visitors from ROI will treat themselves to special and unique experiences despite cost of living. **61%** pre-family and **56%** of 18 – 34 year olds being the most likely to treat themselves.

There are six segments *(1)* Active Maximisers, *(2)* Open-minded Explorers, *(3)* Indulgent Relaxers *(4)* Culture & Connection Seekers *(5)* Good Time Families *(6)* Open-minded Families., with three priority segments for the ROI market.

Priority Segments: Active Maximisers, Indulgent Relaxers, Open-minded Explorers

18 Republic of Ireland Market Strategy 2021 - 2026
19 TNI Consumer Sentiment Research Jan 2023 https://www.tourismni.com/globalassets/industry-insights/sentiment-analysis/sentiment-analysis-january-2023/market-takeaway-january-2023/roi-market-industry-takeaways---jan-2023.pdf

1. Active Maximisers

Motivations: They want to experience a range of action packed, diverse and unique experiences. Nuance offering for this segment for those who are pre-family and also those with young families.

Demographics: Most likely 30-40, even gender split, have younger children (under 16), low spending

Estimated annual spend: £871

2. Indulgent Relaxers

Motivations: They want indulgent / high quality pampering breaks and experiences. They enjoy high quality of food experiences, shopping and a good night-time offering

Demographics: Most likely 40-50yrs, ABC1, have older children, mostly female

Estimated annual spend: £1013

3. Open-minded Explorers

Motivations: A desire for learning and new experiences, they enjoy outdoor (natural beauty), cultural and food offerings. They like to feel welcomed and want the opportunity to engage with local people and culture.

Demographics: Most likely 45-54yrs, ABC1, have older children, mostly female

Estimated annual spend: £924

Republic of Ireland Visitor Segments

33% Active Maximisers
(grown from 10 to 33% with many young families)

- Youngest segment although significant number (57%) will have young children
- Like to have planned and packed itinerary
- Looking for a great destination and will plan around that
- Looking for energetic experiences, unpredictability
- Seeking night life, buzz but also romantic destinations
- Active on social media and like to share holiday online

15% Open-Minded Explorers

- Interested in the natural environment, scenic attractions
- Motivated by culture and are seeking unique experiences
- Food very important and highly motivating for them
- Want high quality accommodation
- Older segment - concerned about their personal safety and health
- Want good value for money

11% Indulgent Relaxers

- Most likely segment to take a 'romantic' break as their next break
- Motivated by the opportunity to spend time with family or friends on short breaks
- Prefer to stay in large comfortable hotels
- Like to 'indulge' themselves when on a break
- Enjoy good food and music
- Interested in shopping opportunities while on a short break

20% Culture and Connection Seekers

- Most likely segment to be interested in arts, culture and food
- Motivated by the opportunity to spend time with family or friends on short breaks
- Although older still motivated by energetic and outdoor activities
- Older segment - more likely to be thinking about safety (personal and health) than other segments - need reassurance

8% Good Time Families

- Interested in a variety of things - seeking to get the best from their breaks
- Want to enjoy good food and drink
- Like to interact with locals
- More likely to take multi-generational breaks
- Like to research their trips thoroughly and uncover hidden gems
- Bigger spenders but focused on getting a good deal

13% Open Minded Families

- Motivated by natural environment, scenic attractions
- More likely to stay in a variety of different accommodation types
- Motivated by history and culture and are seeking unique experiences
- Looking for a variety of activities to suit all members of the family
- Interested in gentle/relaxing outdoor activities

Domestic NI Visitors

Six segments: *(1)* Comfort Seekers **(13%)**, *(2)* Pragmatists **(13%)**, *(3)* Aspiring Families **(30%)**, *(4)* Short Break Enthusiasts **(14%)**, *(5)* Natural Quality Seekers **(15%)** *(6)* Social Instagrammers **(15%)**

Priority Segments: Natural Quality Seekers **(15%)**, Aspiring Families **(30%)** and Social instagrammers **(15%)**

1. Natural Quality Seekers

Motivations: The quality of accommodation is important, they love nature and enjoy the outdoors, their preference is for gentle activities, sustainability is important, they enjoy planning and like to have clear itineraries and short breaks are an important part of their lives

Demographics: Older (average age 55) most likely to be male, ABC1 with older kids

Estimated annual spend: £1,238

2. Aspiring Families

Motivations: This segment has a strong family focus, activities very important (all types, variety of interests), they need activities to suit children, as well as the whole family, they are planners and do a lot of research, they are price conscious always seeking value, they consider themselves bargain hunters but not afraid to pay for quality (if worth it)

Demographics: Most likely 35-44, even social class split, have younger children (under 16)

Estimated annual spend: £1,360

3. Social Instagrammers

Motivations: This segment seek buzz and atmosphere, they look for nightlife, great pubs etc. They are more likely to use Airbnb for accommodation. Short breaks are an important part of their life.They want to broaden their minds. Wi-Fi 4G connectivity is very important for them, as is a good deal while engaging in activities is deemed more important than finding great accommodation

Demographics: Youngest segment with **29%** aged 18-24yrs and **26%** aged 25-34yrs. Least likely to have children. More likely to be female, slight C2DE bias

Estimated annual spend: £1,006

14% Short Break Enthusiasts

- Love short breaks – important part of their lives
- Active planners – research in detail
- Actively write reviewers online
- Seeking to engage with people and culture
- Will indulge themselves
- Big food emphasis
- Quality and location are key considerations
- **Demographics**: Even gender split, older (av. age 54), even social class split
- **Estimated annual spend:** £1,020

13% Pragmatists

- Inclined to seek value (price focused) but also want quality (balanced decision makers)
- Like to relax and need to feel welcome
- Have a focus on enjoying good food
- Active researchers – gather information from a variety of sources
- Active on social media
- **Demographics:** Female bias, older (av. age 45), olderchildren, even social class split
- **Estimated annual spend:** £964

13% Comfort Seekers

- Seeking safe, secure, easy to get to and easy to organise short breaks
- Need to feel welcome
- Like familiar places where they can relax
- Love nature, culture and enjoy engaging locals
- Care for the environment and are interested in sustainability
- Active online but limited / little use of social media
- **Demographics:** Older, more female, C2DEF, older kids 16+
- **Estimated annual spend:** £822

INTERNATIONAL SEGMENTS

Culturally Curious

The Culturally Curious are visitors who are independent, explorative travellers who tend to 'do a destination' in one holiday. They are motivated by their curiosity and a passion to broaden their minds by exploring new places and they are willing to pay extra for quality. They enjoy connecting with local people, learning about their way of life through new experiences. They are well travelled and are the most selective in terms of types of holidays and activities they choose. They are always looking for new places and experiences that are intimate and 'out of the ordinary'. They are connected to issues of society, the environment and self.

Motivations: Culturally Curious are explorers and seek to venture off the beaten track. They seek city breaks to one or more cities, along with a rural holiday. They want rich, diverse and personal experiences which allows them enhance their repertoire of intriguing life stories to share with family and friends. They also want to visit historical sites that have an engaging story to tell, be active in nature yet not do anything too strenuous and they want access to culture particularly those for which a destination is famous. Culturally Curious are curious to learn about local Irish culture, traditions and interesting historical, visit built heritage and get the insider perspective through meting locals, stories. They have a high value on the environment and enjoy immersing themselves in the Irish landscapes and seascapes through activities such as walking, cycling, boat trips.

Bookings Influences: They are largely influenced by the experiences of other people. Internet browsing is the 2nd most important influence followed by consumer reviews. Targeting the Culturally Curious requires a use of language, imagery and tone which creates a strong emotional connection with the place and its people helping them visualise themselves immersed in the sights, sounds, smells and tastes of the local environment.

Demographics: **51%** Male and **49%** Female, **22%** are 34years old, **39%** are between 35-54 years and **39%** are 55+ years. They usually travel independently or in couples.

Length of Stay & Average Spend: Average stay just over **7.66 days** (almost a day longer than the average holidaymaker) with an average spend of **€97.06** per day.

Origin Market & Market Size: **60%** come from Mainland Europe (19.2M), **12%** GB (5.6M), **16%** USA (14.9M)

Culturally Curious Highlights

1. Curious learners who want to visit new places and expand their travel experience by exploring landscapes, history and culture.
2. 'Explorers' rather than 'tourists' – they are well travelled and want to discover the hidden stories and get under the skin of a destination.
3. They base themselves in a location, using mostly serviced accommodation, hire a car and travel around exploring the wider area during the day.
4. Looking for 'out of the ordinary' travel experiences. They want an interactive, local and personalised experience rather than the usual prescribed tour.
5. Travellers who want to relax, enjoy and explore the natural environment and experience the real Ireland by being active in scenic landscape (walking, cycling etc.). They want to go home feeling they really explored a place and feeling good about themselves socially, physically, mentally and spiritually.
6. Sociably responsible and environmentally conscious.
7. Quality conscious – quality is important to them in terms of quality of products and services they choose as well as the quality of life and wellbeing. They will pay extra for quality products such as personalised experiences, fresh local produce, hand crafted and organic products and recognise quality badges.
8. Health conscious they look after themselves; going out of their way to eat healthy and stay active.
9. People that like to be recognised and acknowledged for having made a good, cultural holiday choice.
10. Individuals who like to share their special, personal experiences with others via word of mouth.

Great Escapers

Great Escapers are looking to escape from it all, seeking a well-deserved break from the everyday pressures of work and home and want to spend quality time together to create memories. They enjoy beautiful landscape and being connected to nature. They are looking for rural touring holidays which provide the promise of local, authentic activities are top of their list. However, they will expect to incorporate a stay or visit to one or more cities as part of the itinerary. They are not as well travelled as other segments and tend to revert to similar holidays in similar countries and destinations. They are price conscious.

They are pragmatic and focus on what they want from a holiday rather than the destination. However destinations that deliver for them gain their loyalty, promoting repeat family memory-making visits. They are most likely to book package deals, take longer holidays and tour a wider area.

Motivations: Great Escapers like authentic experiences with the option to enjoy local experiences and community events. They participate in gentle activities, they are averse to risk, they are not 'ground-breakers' in trying new things. They need to be reassured that their destination choice has been 'tried and tested' and openly seek feedback and recommendations from others. They are not large users of social media preferring personal recommendations from people they know

Booking Influences: They are influenced by Word of Mouth (WOM) recommendations, official and trustworthy sources of information, customer reviews and are most likely to book package deals and they tend to research extensively both on and offline

Demographics: 47% Male / **53%** Female, **37%** -34yrs **39%** 35-54 years **24%** 55+ years Travel mainly in couples but sometimes with young families.

Length of Stay & Average Spend: Average stay of **7.17 days**. They stay longer than other segments and spend an average of **€90.46** per person per day.

Origin Market & Market Size: 60% from Mainland Europe (19.2M), **12%** from GB (5.6M), **16%** from the USA (14.9M)

Great Escaper Highlights

1. They need downtime to escape from their busy lives so they can reconnect with themselves and loved ones
2. They are sociable and enjoy interacting with local people as a means of understanding the living culture and hearing their stories through music, food and dance etc
3. They like to connect with nature and enjoy experiencing and watching the changing landscape as it can offer respite they need from everyday life.
4. They want to make treasured life-long memories while on holiday with their family and/or friends.
5. They are usually off-season travellers travelling mainly in Spring and Autumn.
6. They are independent, will hire a car and spend one to three days in a city and then tour mainly in a rural area to discover the local hidden gems.
7. They are very price and value conscious.
8. Planners who need reassurance in planning, seeking personal and trusted recommendations before and during their holiday.
9. Value seekers who will stay in a variety of good-value, quality local accommodation from B&Bs to self-catering.
10. Active and enjoy outdoor activities such as walking, hiking, cycling, water activities, boat trips etc.

Social Energisers

Visitors with a passion and want to experience new things. They constantly seek out new places and new travel experiences – the more unique and exciting, the better. Early adopters, driven by being the first to try something new, different and innovative. Seeking fun and excitement and want to engage fully with the destination at a destination with both density and diversity of experiences and opportunities to engage with the locals. They share and brag via social media.

Social Energisers travel to a lot of cities, have high expectations and compare prices for value. Hence they expect to pay 'local prices' in local areas. They expect to meet real local people and integrate into the local scene. If a 'local bar' or area becomes 'too-touristy' and doesn't seem real, they will not return. Social Energisers from GB need a bigger, more compelling reason to visit Ireland as they feel they have 'similar' choices at home. They are most likely to book short city breaks, visiting Dublin first and then, once positive, return to see another city or cities.

Motivations: They are looking for energetic Vibrant Urban Experiences. While they enjoy culture, history, friendly local people, bars and restaurants they are interested in socialising while being centrally located. They are looking for destinations with a strong energetic vibe, good nightlife, a good local entertainment scene and festivals - local food and drink is important. They want to experience real living culture with locals in a vibrant urban atmosphere. 'Energy' for Social Energisers is not so much about 'energetic adventure activities' but more about active places, places with a vibe.

They are attracted to cities and destinations which have a distinctive urban reputation or energetic vibe – particularly if the city has a 'hip urban neighbourhood', local residential vibe. Images and videos of authentic, 'once in a lifetime' experiences, framed in an interesting backdrop are really important to influence their decision. Active places, places with a vibe.

Booking Influences: Social Energisers are the most digitally savvy of all the segments, but they are also significantly influenced by talking to others. They use internet browsing to explore their holiday ideas and will search online for information about interesting activity options while on holiday.

Demographics: **53%** Male / **47%** female , **36%** -34years, **34%** 35-54 yeas, **30%** 55+ years. Social Energisers travel mainly in groups or couples.

Length of Stay & Average Spend: Average stay **5.17 days** and spend **€130.43** per person per day.

Origin Market & Market Size: **39%** Mainland Europe (9.4M), **23%** GB (3.4M), USA **28%** (23M)

Social Energiser Highlights

1. Early adopters, trend setters and influenced by brands, reputation and the 'next big thing'… they do not want to miss out.
2. Sociable – they are frequent users of digital technology and social media, but also seek out ideas from people they talk to.
3. Influenced by the travel stories and experiences of others they meet.
4. Conscious of how they portray themselves … they want their holiday experience to reflect their 'uniqueness' and their aspirations to stand out from the crowd.
5. Travellers rather than tourists; they travel a lot, experience a lot and do a lot, hence expect easy access, good facilities, relevant, local and readily-available information and a fun, genuine local entertainment scene
6. Most likely to seek out different local foods and post food images.
7. Strong consumers. They are spontaneous and indulgent and believe they should enjoy themselves. They live for today.
8. Not typically repeat visitors but have a high potential to visit a city other than a capital. They have a strong influence on like-minded, potential visitors via word of mouth and social media.

Market Profiles & Opportunities[20]

RoI Market Profile[21]

Overview: Between 2016 – 2019 ROIs share of 'external' overnight visitors grew from **17.5%** to **25%** in terms of volume and from **11%** to **19%** in terms of spend.

2019: RoI market worth a total value of **£142m**

2019: 755,000 overnight trips were made by ROI residents, representing a growth of **66%** for the period 2016 to 2019 in terms of trips, with spend growing by **104%** over the same period. **46%** of ROI consumers who have taken a break in Northern Ireland indicated it met their expectations, with a further **41%** stating it exceeded their expectations.

Opportunity: The 2026 target is for a **24%** growth in trips versus 2019, **31%** growth in spend (totalling £321 million annual spend by 2030), representing a growth of **2%** p.a. in trips and **31%** revenue increase representing an increase of **2.5%** p.a. in revenue.

Northern Ireland Domestic Market Profile[22, 23]

Overview: Domestic tourism market represents **44%** of all trips made in Northern Ireland and **31%** of all revenue generated.

2018 - 2.2 million overnight trips and an estimated expenditure of £300 million by Northern Ireland residents equating to 44 percent of all overnight trips taken in Northern Ireland and 31 percent of spend.

2019 - an estimated 2.3 million domestic overnight trips were taken within Northern Ireland with an estimated expenditure of £313 million. Northern Ireland Residents spent 1.2 million nights in local hotels and an estimated 4.8 million nights on 'staycations'.

Opportunity: 2030 Target is a **24%** growth in trips versus 2019, **31%** growth in spend (totalling £321 million annual spend by 2030), representing a growth of **2%** p.a. in trips and **31%** revenue growth representing an increase of **2.5%** p.a. in revenue generated.

Seasonality of NI Domestic Holidays: **21%** Jan-Mar, **30%** Apr-Jun, **32%** Jul-Sep, **17%** Oct-Dec.

Purpose of Visit: **61%** holiday, **31%** VFR, **5%** Business and **3%** other.

Length of Stay: predominantly short breaks of 1-3 nights

Accommodation types: **25%** Hotel, **14%** holiday homes, **34%** with relatives, **10%** caravan and camping, **7%** self-catering and **9%** other.

Destinations: (1) Causeway Coast & Glens was the most popular attracting more than a quarter of the domestic trips taken in NI, Belfast was the second most popular destination, followed closely by Newry, Mourne & Down region.

Activities: **60%** restaurant, café, pub or nightclub, **40%** hiking or walking, beaches and/or the coast **(32%)** and shopping **(26%)**.

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20 Tourism Ireland Market Profiles
21 Republic of Ireland Market Strategy 2021 - 2026
22 NI Domestic Market - At a Glance.
23 Northern Ireland Tourism Strategy 2020

	Great Britain	United States	Germany	France
Opportunity	**2019:** 4.8M tourists 1.7M holidaymakers. 1.5M tourists included NI	**2019:** 1.7M tourists 1.3M holidaymakers. 212,000 tourists included NI	**2019:** 749,000 tourists 509,000 holidaymakers. 65,000 tourists included NI	**2019:** 557,000 tourists 347,000 holidaymakers 55,000 tourists included NI
Revenue	**Tourist:** €1.4bn/£1.3bn **Average:** €302/£263 per Tourist **Average spend while in NI:** £305	**Tourist:** €1.6bn/£1.4bn **Average:** €916/£797 per Tourist **Average spend while in NI:** £166	**Tourist:** €459M/£399M **Average:** €613/£533 per Tourist	**Tourist:** €283m/£246m **Average:** €508/£442 per Tourist **Average spend while in NI:** £161
Length of Stay	**Tourists:** 4.7 nights **Holidaymakers:** 4.3 nights **NI:** Average of 3.2 nights	**Tourists:** 8 nights **Holidaymakers:** 7 nights **NI:** Average of 2.4 nights	**Tourists:** 8.6 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.5 nights	**Tourists:** 9.9 nights **Holidaymakers:** 7.5 nights **NI:** Average of 3.1 nights
Reason for visiting	36% Holiday, 46% VFR, 17% business, 1% other	73% Holiday, 17% VFR, 6% business, 4% other	68% Holiday 16% VFR 11% business 5% other	62% Holiday 18% VFR 12% business 8% other
Activities	The British are active holidaymakers: **70%** sites of historical interest, **70%** engaged in pastimes/events, **33%** participated in activities.	American Holidaymakers are active tourists: **96%** sites of historical interest, **90%** engaged in pastimes/events **44%** participated in activities.	Germans are active tourists and hiking/cross-country walking is their most popular activity **92%** sites of historical interest, **83%** engaged in pastimes/events **58%** participated in activities.	French are active tourists and enjoy exploring historical sites and engaging in multiple events and activities while on the island of Ireland. **89%** sites of historical interest, **93%** engaged in pastimes/events **52%** participated in activities.
Travel Trends	31% visit July – September 20% Jan – Mar 27% Apr – Jun 21% Oct – Dec 23% visit NI	543,000 Rent a Car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 17% Oct- Dec 10% visit NI	169,000 rent a car 42,000 bring a car 36% visit July – September 13% Jan – Mar 34% Apr – Jun 16% Oct- Dec	66% rent a car 30% bring car on ferry 34% visit July – September 18% Jan – Mar 30% Apr – Jun 17% Oct- Dec
Planning	WoM is the most powerful influence 71% of GB holidaymakers planned their trip via the internet 12% using guidebooks	48% were inspired to visit by word of mouth 74% of American holidaymakers planned their trip via the internet 25% using guidebooks	Almost 50% were inspired to visit by word of mouth 70% of German holidaymakers planned their trip via the internet 35% using guidebooks	53% were inspired to visit by word of mouth 66% of French holidaymakers planned their trip via the internet 41% using guidebooks
Demographic Profile	39% yrs 25-44yrs, 18% under 24yrs, 43% over 45yrs, 79% ABC1	39% 55yrs+ 20% 35 - 54yrs 42% couples 92% ABC1	50%+ under 35yrs 33% under 25yrs 43% couples 90% ABC1	50%+ under 35yrs 36% couples 92% ABC1
Accommodation	Paid Accommodation - predominantly hotels. 50% spent with Family & Friends	Paid Accommodation - predominantly hotels.	Hotels, B&B's, Guesthouses	Rented Accommodation Hotels Guesthouses/B&B's
Core Segments	19% Culturally Curious (4.4M) 23% Social Energisers (2.7M)	32% Culturally Curious (11.5M) 22% Social Energisers (12.9M)	49% Culturally Curious(9.1M) 10% Social Energisers (2.4M) 24% Great Escapers(7.9M)	51% Culturally Curious(6.2M) 14% Social Energisers (1.9M) Great Escapers (2.5M)

SECTION 3

Opportunities to Consider

Optimising the existing experiences for visitors

Cultural & Heritage visitors want to learn, discover and experience the cultural attractions/products of Northern Ireland. Northern Ireland has an extensive range of uniquely NI experiences for its visitors. From its coastal and mountain driving routes, iconic attractions, tangible and intangible heritage and culture offerings, its natural stunning landscapes and its world-renowned natural attractions, there is much to see and do when visiting. Optimising the existing experiences can easily deliver more for both the destination in capacity enhancement and for the visitor through experience augmentation. Effective optimisation of existing experiences can be achieved with relative ease and in a short term through initiatives such as:

- enhancing driving routes to include experiential cultural elements,
- linking existing attractions through thematic and spatial clustering,
- incorporating night-time entertainments into existing venues,
- develop touring routes for soft adventure intertwined with culture,
- offering 'hands-on' experiences in crafts, agritourism and industrial heritage experiences,
- guided cultural experiences telling the great stories of NI.

Expanding to develop a new portfolio of visitor experiences

As the optimisation of existing visitor experiences is developed, augmenting and enhancing the entire portfolio to deliver new experiences can be achieved by layering existing experiences with new innovative technologically enhanced complementary elements. The introduction of Virtual Reality, Augmented Reality, gamification where the real world and video games merge, immersion through 'Layered Reality' techniques combining digital technology, live theatre and in person delivery can create new uniquely captivating and memorable experience to deliver the Northern Ireland stories in a creative and unique way and introduce new ways of experiencing Northern Irelands culture.

Delivering Visitor Attraction Experiences

Overall satisfaction for a great visitor attraction experience is dependent on many factors not least staff friendliness, a warm authentic and genuine welcome, value for the money and a quality retail food and beverage experience. Elements of a great visitor attraction include:

- **Guided Tours & Storytelling**: Fáilte Ireland research shows that guided tours and story-telling makes all the difference to the visitor experience at attractions. These aspects are the key factors in ensuring a great visit to an attraction. Tours delivered by passionate, well informed guides telling fun, informative and re-tellable stories, that are unique to Ireland and the story of Ireland lead to a highly memorable experience for visitors.
- **Delivery and Navigation**: The research shows that easy navigation, simple, coherent layouts of exhibitions or attractions combined with unique concise interpretation and story-telling and the use of audio-guides (to include languages) positively influence visitor satisfaction and experience at visitor attractions.
- **Transactions**: Good value is important to visitors and they have an aversion to perceived hidden costs. On purchase of entrance tickets, visitors should be informed of any additional on-site charges or admission fees. To achieve a higher visitor satisfaction level, visitor attractions should try to keep transactions simple with one price point for the entire experience.
- **Story Content**: Visitor on-site experiences should include memorable re-tellable stories about people, rituals or events and they should be different & unique from online promotion.
- **Visitor Management**: It is important that visitor attractions remember the person in the audience, visitors like to have a relaxed experience and so smaller group tours, time managed slots with minimal noise is desirable for high levels of visitor satisfaction and experience.
- **Location**: Visitors like to engage with the landscapes surrounding visitor attractions and this is especially true for attractions located outside cities and large urban areas. For guides to acknowledge and celebrate the long journey visitors have made to reach the venues provides acknowledgement and satisfaction for visitors.

Opportunities to Consider

Attractions Development Opportunities: Incorporation of new experience delivery approaches in attractions to reflect international trends that include:-

- Artainment – delivering a fusion of art and technology in visitor experiences.
- Development of digital experiences.
- Personalisation of experiences on site.
- Provision of experiences that account for increasing trends in multigenerational travel.
- Opportunities to engage in competitive socialising and gamification
- opportunities around the delivery of unique culture and heritage stories.
- Visitor demand for guided experiences.
- Cater for an increase in conscious consumption among visitors and seeking authentic untouched experiences.

Embracing technology: Creative delivery of the Northern Ireland cultural

story through new technologies, innovative displays and interactive

galleries that deliver a contemporary interpretation of cultural experiences.

Foreign Language Provision: Increase the appeal to international visitor markets by increasing the level of foreign language provision in experiences.

Living Culture: The further development of guided Living Culture experiences that introduce the visitor to great Northern Ireland stories told in different ways and in different venues.

Cultural & Creative Heritage Sustainability: The development of more experiences that introduce the visitor to places that protect the stories and culture of Northern Ireland e.g. immersive, ‘hands on’ and ‘learn to’ experiences linked to local culture around crafts, food and industrial heritage.

Genealogy Experiences: The development of new genealogy experiences and services supported by the expansion of a destination wide genealogy experience network.

Culture and Heritage Experience Fusions: Examine new ways to deliver cultural and heritage experiences blending it with other experience categories such as outdoor activities, community experiences, food and drinks experiences.

Irish Craft Experiences: The growth and development of a network of craft making and “learn to” experiences particularly focused on rural destinations.

Linking Soft Activities and Culture: The development of cultural experiences delivered through an increase in “learn to” experiences combined with outdoor interpretation of local culture through local looped and guided walks.

New Ways of Accessing Culture and Heritage: The development of a network of cultural and heritage experiences that are uniquely accessed by alternative modes of transport e.g. experiences combined with cycling or ferry access to attractions.

Packaging and Experience Bundling: Work with the local accommodation providers to develop a new approach to packaging of experiences, creating innovative itineraries linking coastal, rural and urban destinations.

Year Round Niche Cultural Programming: The development of niche cultural events linked to epic experience themes highlighting year round accessible experiences in the destination.

Neighbourhood Tourism: The development internationally of neighbourhood experiences where the visitor can hear the authentic local story and new approaches to experiential urban culture.

Experiential Focused Touring Routes: Enhancement of established touring routes to develop a more experiential focus and slow the visitor down through engaging heritage and cultural experiences.

Linking Iconic with Lesser Known Experiences: The development of thematic touring routes and trails e.g. the Epic cultural road trip linking lesser known experiences with iconic attractions and experiences.

Community Culture: Develop community led experiences to provide visitors with the opportunity to understand traditional ways of life, local culture and unique ways of interpreting the heritage story of Northern Ireland. The development of community tourism led experiences providing the visitor with the opportunity to meet the locals and hear the authentic local story using urban life, rural life and island life as development opportunities.

Night Time Entertainment: The incorporation of new evening time experiences in existing cultural and heritage venues.

Traditional Irish Entertainment: Development of an iconic destination evening performance experience linked to traditional Irish music and cultural performances set in a historic venue.

Rural Heritage: Build on the agricultural heritage of Northern Ireland to develop best in class rural tourism experiences that encourage visitors to explore the rural hinterlands. This can include 'Meet the Makers and Producers' in addition to regenerative tourism experiences linked to farming and agri experience innovation.

Natural Heritage & Culture Development: Maximise the uniqueness of the Loughs and Lakes water proposition to grow the experience base combining culture and outdoor activity to compliment the appeal of the coastal tourism product.

Sustainability as a Platform for Innovation: Embracing sustainable practices as a platform for experience innovation and exceeding visitor expectations in how experiences will be delivered beyond adherence to the expected environmental and sustainable requirements.

Industrial Heritage Experiences: The expansion of the visitor experience base linked to the destination's rich industrial heritage and the creation of new opportunities to immerse the visitor in hands on and cultural learning experiences linked to the extensive industrial heritage base.

Island Culture: Build an Island Culture Centre of Excellence on Rathlin Island linked to the opportunities identified through living culture, coastal heritage and community tourism experiences.

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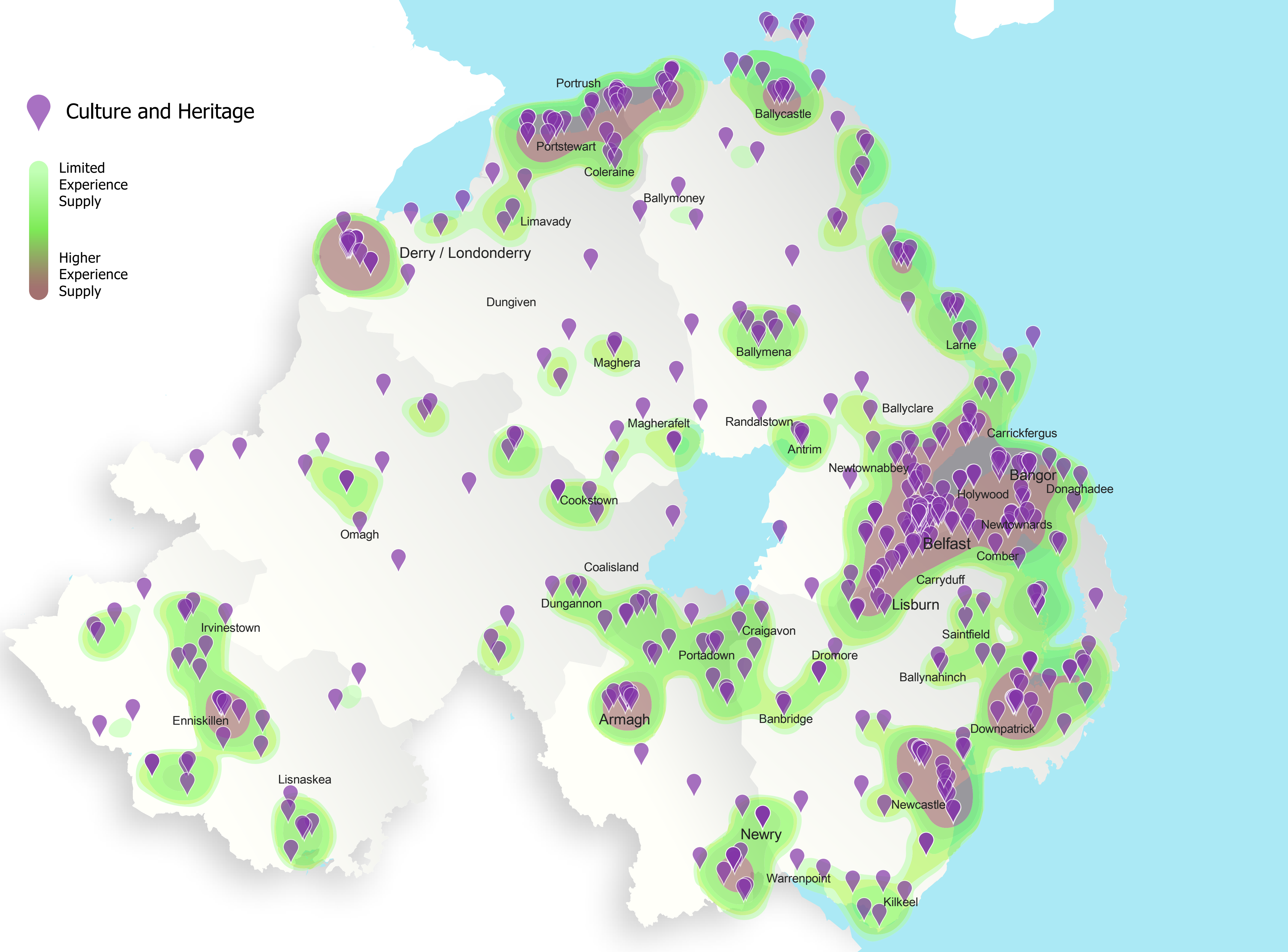
https://www.tourismni.com/research-insights/tourism-360/

Situational Analysis - Culture & Heritage

TOURISM NORTHERN IRELAND



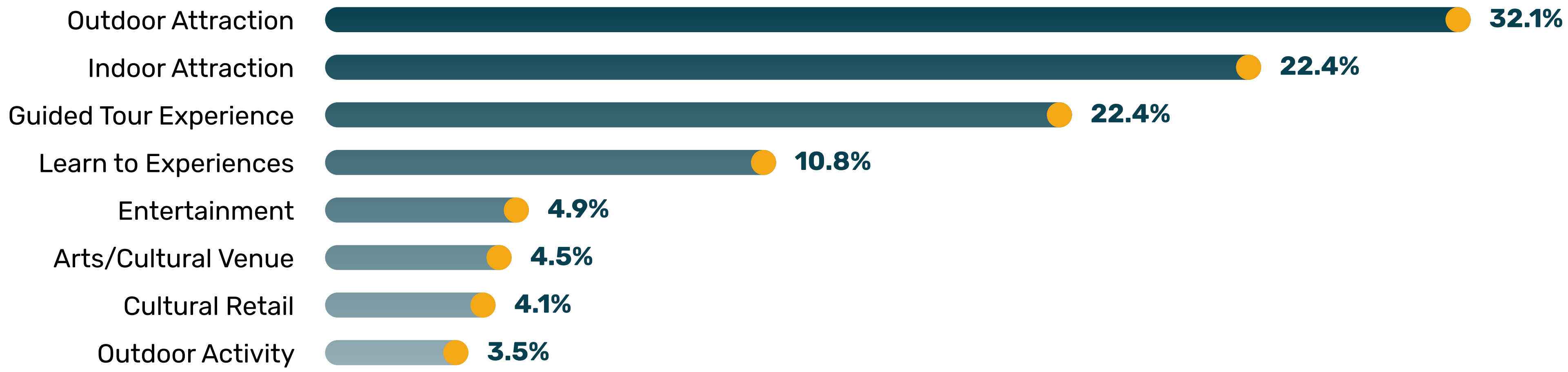
Culture and Heritage
Limited Experience Supply
Higher Experience Supply
Portrush
Ballycastle
Portstewart
Coleraine
Ballymoney
Limavady
Derry / Londonderry
Dungiven
Maghera
Ballymena
Larne
Ballyclare
Magherafelt
Randalstown
Antrim
Carrickfergus
Newtownabbey
Bangor
Holywood
Donaghadee
Cookstown
Omagh
Newtownards
Belfast
Comber
Coalisland
Carryduff
Lisburn
Dungannon
Irvinestown
Craigavon
Saintfield
Portadown
Dromore
Ballynahinch
Enniskillen
Armagh
Banbridge
Downpatrick
Lisnaskea
Newcastle
Newry
Warrenpoint
Kilkeel

Culture & Heritage Cluster Map Summary

County	Percentage of overall Culture & Heritage Products in NI	Number of Culture & Heritage Experiences	Strongest Product Category
Antrim	38%	190	Guided Tour Experiences
Down	25%	122	Outdoor Free Attractions
Derry/ Londonderry	15%	74	Outdoor Free Attractions
Tyrone	9%	45	Outdoor Free Attractions
Armagh	9%	44	Outdoor Free Attractions
Fermanagh	4%	22	Outdoor Free Attractions
Total	100%	497	Outdoor Free Attractions

Antrim represents 38% of the Culture and Heritage experiences in Northern Ireland. Fermanagh has the least amount of Culture and Heritage experiences. The strongest product category overall is outdoor free attractions.

Culture & Heritage Cluster Map Summary



Antrim
Total Experiences = 190

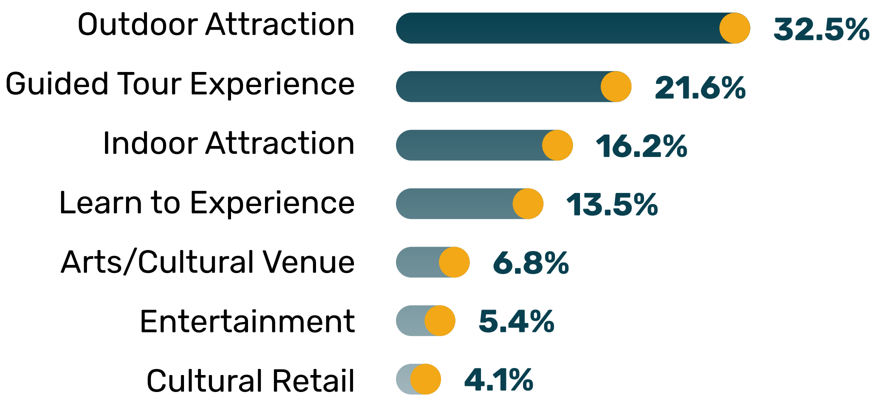
Indoor Attraction	28.4%
Outdoor Attraction	21.1%
Guided Tour Experience	21.1%
Arts/Cultural Venue	6.8%
Cultural Retail	4.2%
Outdoor Activity	3.2%

Armagh
Total Experiences = 44

Outdoor Attraction	43.2%
Indoor Attraction	22.7%
Guided Tour Experience	20.5%
Arts/Cultural Venue	4.5%
Learn to Experience	4.5%
Entertainment	2.3%
Outdoor Activity	2.3%

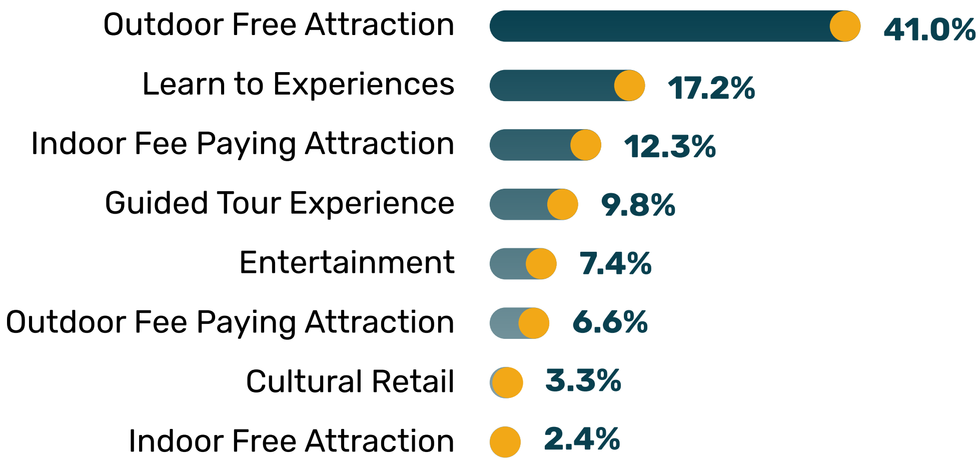
Derry/Londonderry

Total Experiences = 74



Down

Total Experiences = 122



Fermanagh
Total Experiences = 22

Outdoor Attraction	40.0%
Guided Tour Experience	20.0%
Indoor Attraction	17.7%
Learn to Experience	8.9%
Entertainment	4.4%
Arts/Cultural Venue	4.4%
Cultural Retail	2.2%
Outdoor Activity	2.2%

Tyrone
Total Experiences = 45

Outdoor Attraction	59.1%
Indoor Attraction	22.7%
Guided Tour Experience	9.1%
Entertainment	4.5%
Arts/Cultural Venue	4.5%

SECTION 4

Building on our **Strengths**

- **Iconic Attractions**: Existence of internationally iconic attractions e.g. Giant's Causeway, Titanic providing immediate destination recognition.
- **Existing Clusters**: Strong product clusters linked to urban accommodation bases and iconic attractions.
- **Urban Destination Experiences**: Intrigue of urban destination experiences delivered through unique Belfast and Derry/Londonderry experiences.
- **Urban Centres**: Capacity to satisfy the growing demand for intangible heritage and culture delivered through historic and vibrant urban centres across Northern Ireland.
- **Film Tourism Experiences**: Ease of access to internationally recognised film tourism experiences.
- **Coastal Product Clusters**: Strong coastal product clusters acting as orientation hubs along the coast linking Belfast, Ballycastle, Portrush and Derry/Londonderry.
- **Coastal Cultural Experiences**: Epic nature of coastal cultural experiences from Castles, the Gobbins, Carrick-a-Rede Road Bridge, spectacular coastal vistas and accessible attractions.
- **Coastal Heritage and Cultural Experiences**: Blend of coastal heritage and cultural experiences from accessible lighthouses, coastal castles to unique island life stories linked to the coastal trails.
- **International Designation**: International designation of Giant's Causeway and Causeway Coast as a UNESCO World Heritage site.
- **Castles & Houses**: Range and variety of Castles and Houses that are accessible to visitors throughout the destination.
- **'Living Culture'**: Accessible and unique 'living culture' guided experiences in urban destinations.
- **National Trust Properties**: Distribution of nineteen National Trust properties across the country providing visitors access to a diverse range of cultural and heritage experiences.
- **Island Culture**: The accessibility of island culture through Rathlin Island to deliver a unique socio-cultural sustainability perspective on life in Northern Ireland.
- **Tangible Heritage**: Depth and variety of tangible heritage across the country including museums, art galleries, historic properties, places of worship, architectural points of interest and visitor attractions.
- **Industrial Heritage Experiences**: Range and variety of industrial heritage experiences linked to urban and rural destinations.
- **Heritage & Culture Touring Routes**: Well established touring routes aligned with strong heritage and cultural assets (e.g. Causeway Coast, Sperrins, Lough Neagh, Mournes).
- **Iconic Themed Trails**: Existence of iconic themed trails such as the St. Patrick's Trail linking key heritage and cultural sites on a 57-mile driving route connecting Armagh with Downpatrick.
- **High Quality Touring Routes**: Quality of touring routes that have the capacity to orientate visitors to key attractions and increase dwell time e.g. Ards Peninsula, Causeway Coastal Route, Sperrins Driving Routes, Mourne Coastal Route and Strangford Lough.
- **Rural Tourism Experiences**: Quality and variety of rural tourism experiences across Northern Ireland appealing to the visitor cohorts looking for "get away from it all" type breaks and motivated by exploring authentic local community delivered experiences.
- **Ancestral Tourism**: Existing ancestral tourism base and range of genealogy options to motivate visitors to explore the wider destination.
- **Festivals and Events**: Quality and range of festivals and events hosted in urban and rural communities.

SECTION 5

Addressing our **Weaknesses**

- **Access to Cultural & Heritage Experiences**: Higher concentration of cultural and heritage experiences in the cities and across the coastal routes in contrast to the rural counties.
- **Dwell time in Rural Destinations**: Lack of motivational cultural and heritage experience clusters outside of the core urban areas with limited dwell time capacity in rural destinations.
- **Access to Guided Tour Experiences**: Low levels of guided tour experiences available across the country with low level of guided experiences outside the main urban areas.
- **Access to Guided Story Telling Experiences**: Limited guided story telling and experience delivery around a number of historic and sacred sites across the country.
- **Limited Agri-tourism Visitor Experiences**: Limited opportunities for visitors to sample rural tourism experiences through limited supply of agri-tourism visitor experiences.
- **Rural Culture Experiences**: Low number of existing rural culture experiences with the capacity to disperse visitors across the country into the rural hinterlands.
- **Local Cultural & Community Experiences**: Limited provision of local cultural and community experiences outside of the main urban centres.
- **Castles & Houses**: Quality and accessibility of experiences associated with Castles and historic Houses across the country.
- **Limited Experiences – Great Gardens**: Scale of Great Gardens experiences across the country.
- **Networking & Clustering**: Limited networking and clustering of cultural experiences through consumer facing trails and product routes.
- **Limited Attractions**: Low numbers of attractions / visitor experiences that exist in a number of counties that offer the potential to disrupt existing visitor flows away from well established touring routes.
- **Digital Technology**: The incorporation of immersive digital technology and new ways of telling the cultural and heritage story is restricted to a small number of attractions and experiences.
- **Digital Capacity**: Existing digital capacity of cultural and heritage experiences delivered have limited levels of pre visit communications with potential visitors.
- **Limited Investment**: Visitor experience delivery across many cultural and heritage sites requires investment to provide a more immersive visitor experience and innovative ways of telling the Northern Ireland heritage and culture story.
- **Tourism Experience Networks**: Limited evidence of strong tourism experience networks collaborating to provide a connected visitor experience in destinations.
- **Evening / Night Time Experiences**: Limited access to evening time experiences associated with the cultural and heritage sites across the country.

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SECTION 6

Opportunities to Consider

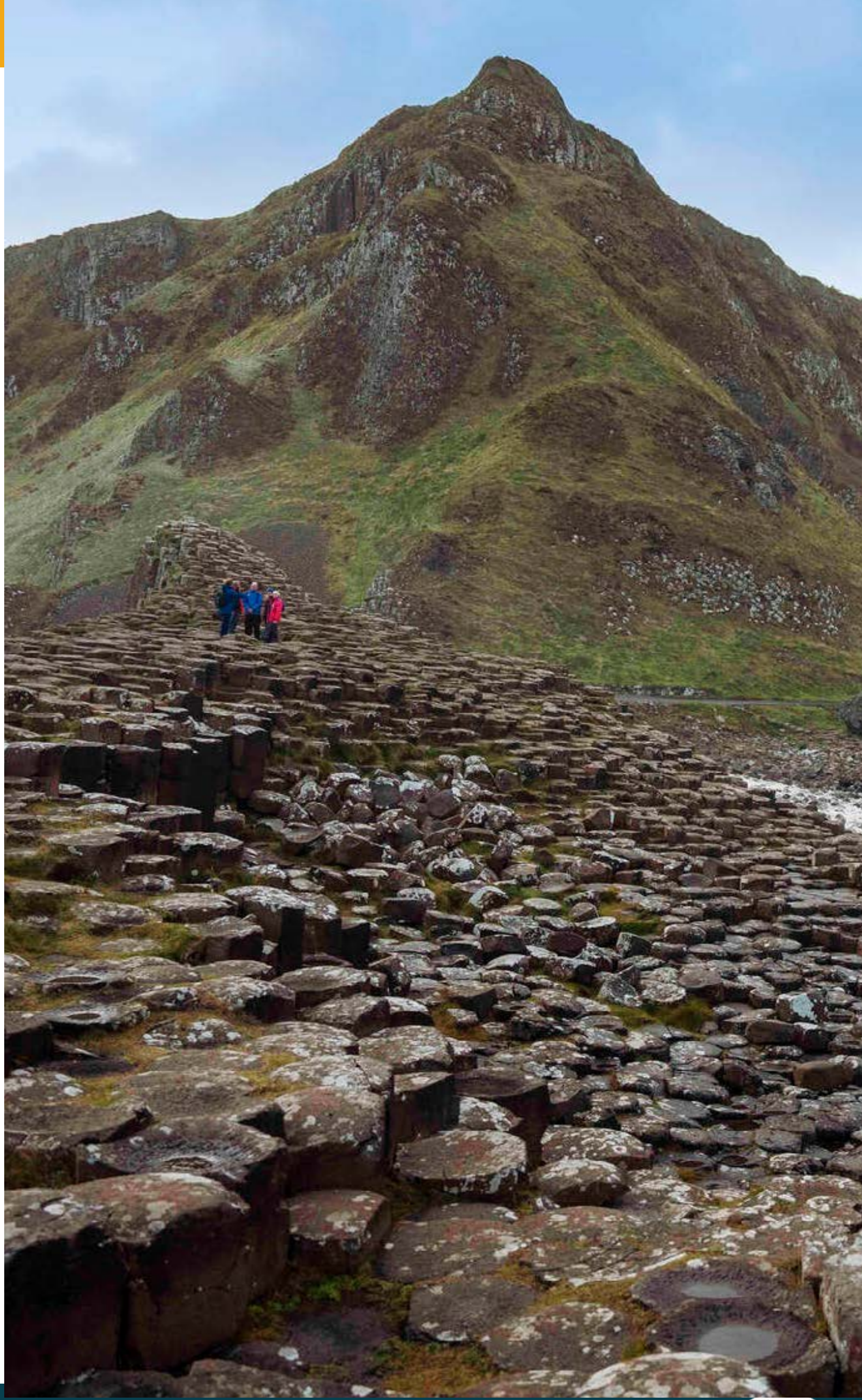
- **Experiential Focused Touring Routes:** Enhancement of established touring routes to develop a more experiential focus and slow the visitor down through engaging heritage and cultural experiences.
- **Linking Iconic with Lesser Known Experiences:** The development of thematic touring routes and trails e.g. the Epic cultural road trip linking lesser known experiences with iconic attractions and experiences.
- **Attractions Development:** Incorporation of new experience approaches in attractions to reflect international trends that include :-
    - Artainment – delivering a fusion of art and technology in visitor experiences.
    - Development of digital experiences.
    - Personalisation of experiences on site.
    - Provision of experiences that account for increasing trends in multi generational travel.
    - Opportunities to engage in competitive socialising and gamification opportunities around the delivery of unique culture and heritage stories.
    - Visitor demand for guided experiences.
    - Cater for an increase in conscious consumption among visitors and seeking authentic untouched experiences.
- **Embracing technology:** Creative delivery of the Northern Ireland story through new technologies, innovative displays and interactive galleries that deliver a contemporary interpretation of cultural experiences.
- **Community Culture:** Develop community led experiences to provide visitors with the opportunity to understand traditional ways of life, local culture and unique ways of interpreting the heritage story of Northern Ireland. The development of community tourism led experiences providing the visitor with the opportunity to meet the locals and hear the authentic local story using urban life, rural life and island life as development opportunities.
- **Living Culture:** The further development of guided Living Culture experiences that introduce the visitor to great Northern Ireland stories told in different ways and in different venues.
- **Night Time Entertainment:** The incorporation of new evening time experiences in existing cultural and heritage venues.
- **Traditional Irish Entertainment:** Development of an iconic destination evening performance experience linked to traditional Irish music and cultural performances set in a historic venue.
- **Rural Heritage:** Build on the agricultural heritage of Northern Ireland to develop best in class rural tourism experiences that encourage visitors to explore the rural hinterlands. This can include 'Meet the Makers and Producers' in addition to regenerative tourism experiences linked to farming and agri experience innovation.
- **Natural Heritage & Culture Development:** Maximise the uniqueness of the Loughs and Lakes water proposition to grow the experience base combining culture and outdoor activity to compliment the appeal of the coastal tourism product.
- **Cultural & Creative Heritage Sustainability:** The development of more experiences that introduce the visitor to places that protect the stories and culture of Northern Ireland e.g. immersive, 'hands on' and 'learn to' experiences linked to local culture around crafts, food and industrial heritage.
- **Sustainability as a Platform for Innovation:** Embracing sustainable practices as a platform for experience innovation and exceeding visitor expectations in how experiences will be delivered beyond adherence to the expected environmental and sustainable requirements.
- **Industrial Heritage Experiences:** The expansion of the visitor experience base linked to the destination's rich industrial heritage and the creation of new opportunities to immerse the visitor in hands on and cultural learning experiences linked to the extensive industrial heritage base.
- **Genealogy Experiences:** The development of new genealogy experiences and services supported by the expansion of a destination wide genealogy experience network.

- **Culture and Heritage Experience Fusions:** Examine new ways to deliver cultural and heritage experiences blending it with other experience categories such as outdoor activities, community experiences, food and drinks experiences.
- **Irish Craft Experiences:** The growth and development of a network of craft making and "learn to" experiences particularly focused on rural destinations.
- **Linking Soft Activities and Culture:** The development of cultural experiences delivered through an increase in "learn to" experiences combined with outdoor interpretation of local culture through local looped and guided walks.
- **New Ways of Accessing Culture and Heritage:** The development of a network of cultural and heritage experiences that are uniquely accessed by alternative modes of transport e.g. experiences combined with cycling or ferry access to attractions.
- **Island Culture:** Build an Island Culture Centre of Excellence on Rathlin Island linked to the opportunities identified through living culture, coastal heritage and community tourism experiences.
- **Foreign Language Provision:** Increase the appeal to international visitor markets by increasing the level of foreign language provision in experiences.
- **Packaging and Experience Bundling:** Work with the local accommodation providers to develop a new approach to packaging of experiences, creating innovative itineraries linking coastal, rural and urban destinations.
- **Year Round Niche Cultural Programming:** The development of niche cultural events linked to epic experience themes highlighting year round accessible experiences in the destination.
- **Neighbourhood Tourism:** The development internationally of neighbourhood experiences where the visitor can hear the authentic local story and new approaches to experiential urban culture.

SECTION 7

Recognising the **Challenges**

- **Industry Investment Confidence:** Confidence in industry investment eroded by prevailing macro economic conditions.
- **Ability to operate:** Impact of global shocks on the tourism industry to sustain operations, attract staff and be financially sustainable, particularly outside of large urban centres.
- **Exchange Rate:** Exchange rate impact on key markets.
- **Brexit:** The continued uncertainty surrounding Brexit.
- **Consumer Demands:** Post Covid legacy impact on tourism businesses and their capacity to adopt to new consumer demands and expectations.
- **Developing new Culture & Heritage Experiences:** Rising insurance costs limiting how businesses can develop new experiences.
- **Operational Challenges:** Cost of business and operational challenges restricting the number of new entrants into the tourism industry.
- **Operational Costs:** Challenge of operational costs impacting on capacity to focus on new experience development.
- **Changing Visitor Demands:** Failure of tourism industry to adopt an increased experiential focus to reflect changing visitor demands.
- **Linking Experiences:** Lack of integration and linking experiences contributing to a visitor perception of the destination being fragmented and difficult to understand.
- **Networking & Industry Collaboration:** Encouraging greater networking and industry collaboration to cross promote and package experiences.
- **Sustainable Balance:** Requirement to achieve a sustainable balance between visitor management of cultural and heritage sites and destination growth ambitions.
- **Climate Change:** Challenge of climate change leading to extreme weather events that limit visitor engagement at certain heritage sites.
- **Digital Capacity Development:** Pace of adoption by the tourism industry for increased digital capacity development.
- **Motivational Routes Development:** Developing motivational routes that disrupt visitor flows from the established coastal touring route pattern.
- **Rural Tourism Entrepreneurship Culture:** Developing a new rural tourism entrepreneurship culture that inspires the next generation of experience providers.



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