

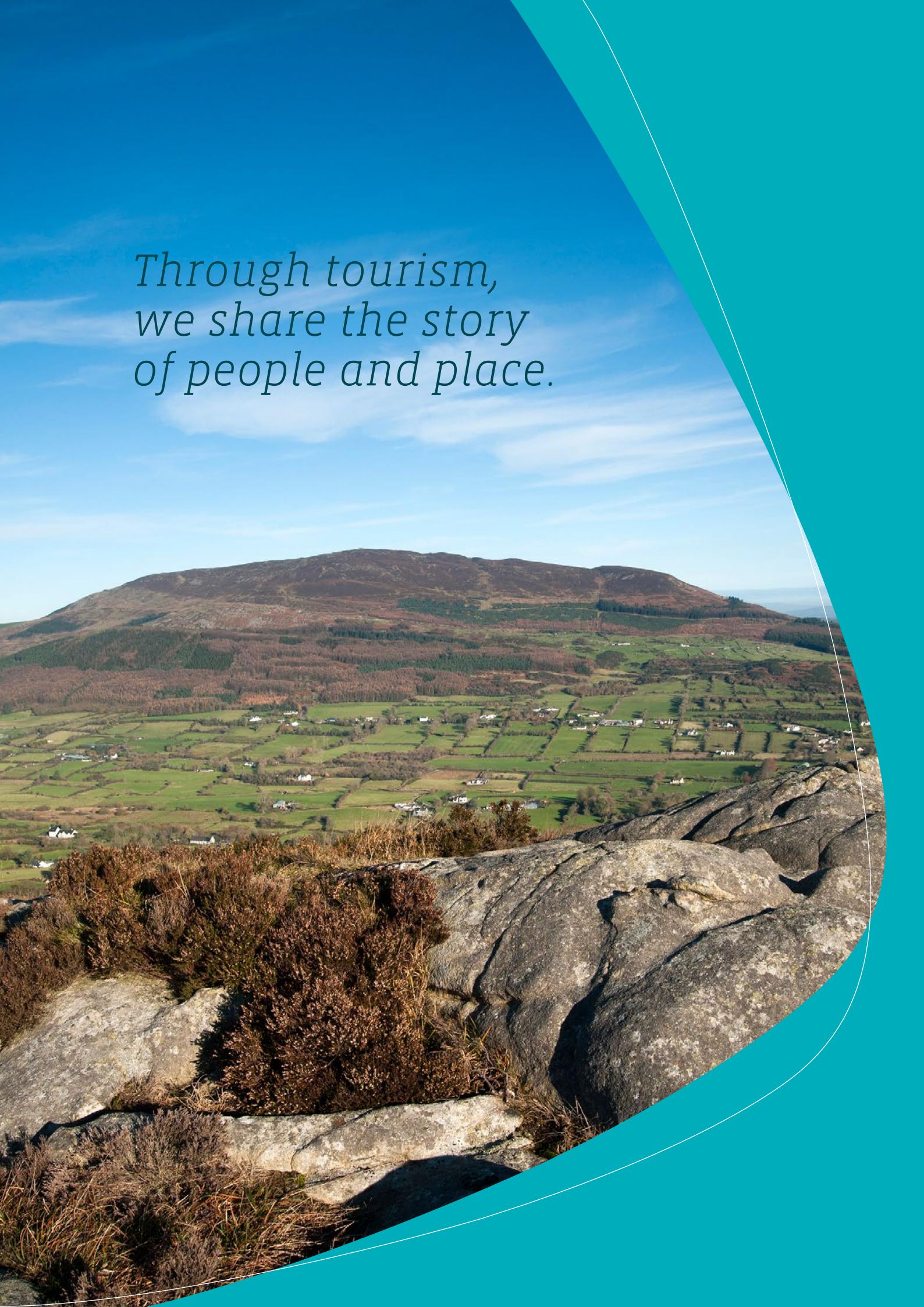
Plean Straitéise Turasóireachta 2024-2029

Tourism Strategy Plan 2024-2029



Comhairle Ceantair
an Iúir, Mhúrn agus an Dúin
Newry, Mourne and Down
District Council

Ag freastal ar an Dún
agus Ard Mhacha Thea
Serving Down
and South Armagh



*Through tourism,
we share the story
of people and place.*

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1. Executive Summary

The purpose of this plan is to provide a clear roadmap and practical guidelines to maximise opportunities for the Newry Mourne and Down district (NMD) as a tourism destination for the period 2024-2029. This plan follows the Tourism Strategy 2017-2021, the first tourism strategy coordinated by Newry Mourne Down District Council (established as a local authority in Northern Ireland in 2015). Within this period, there have been significant widespread achievements ranging from the curation of over 40 world-class market-ready experiences to promote the district and hosting leading tourism events (e.g., the annual IAAT Conference,¹ November 2022) to the Mourne Gullion Strangford UNESCO Global Geopark being ratified by the UNESCO Executive Board in May 2023.

The successes of the Tourism Strategy 2017-2021 have been acknowledged via stakeholder engagement conducted for the Tourism Strategy Plan 2024-2029, with feedback from NMD's tourism industry confirming that significant ground has been broken in raising the destination's profile in Ireland and globally.

Looking to the future, over the next five years the expressed aim is to build upon the hard work and strong foundations that have been laid to date so that NMD can flourish, supported by an ambitious strategy that can achieve increased measurable economic and social benefits.

The Tourism Strategy Plan 2024-2029 clarifies the goals, objectives and strategic priorities that can maximise opportunities and position NMD as a leading tourism destination in Ireland.

The plan is informed by research, consultation, and data analysis, and sets out a clear framework focused on sustainability, social inclusion, and economic impact. It outlines the context for tourism development, defines five key strategic priorities, and establishes a growth target for tourism revenue. Clearly articulating the benefits of the plan, it is supported by a defined vision and value proposition for the destination.

¹ IAAT: Ireland's Association for Adventure Tourism



1.1. Creating the Plan

To inform the creation of this plan, the following work was undertaken:

1. Consultations with

- Newry Mourne and Down District Council (NMDDC) officers
- NMD tourism businesses, stakeholders, organisations, and networks
- NMD community representatives and organisations
- NMD elected members
- Tourism Northern Ireland (TNI)
- Tourism Ireland (TI)
- professional travel buyers: leisure and business tourism
- independent data intelligence and global benchmarking organisations
- Ulster University Economic Policy Centre



2. Desk research, including reports and analysis relevant to NMD's tourism strategy.

This plan, including all recommendations and actions, aligns with regional/national policies and strategies including the following:

Newry Mourne Down District Council (NMDDC)	National Strategies and Policies
NMDDC Culture, Arts and Heritage Strategy 2022- 2027	The Department for the Economy's Tourism Strategy for Northern Ireland - 10 Year Plan
NMDDC's Regeneration and Economic Development Strategy 2022-2025	Together Building a United Community Strategy
NMDDC Corporate Plan 2021- 2023	Rural Needs Act
NMDDC Village, Towns and City Masterplans	Section 75 of the Northern Ireland Act
Newry City Centre Masterplan – October 2011	Tourism NI 2022-23 operating plan
NMDDC Active Travel Masterplan	Tourism NI Annual Report 2020
Living Well Together A Community Plan for Newry, Mourne and Down to 2030	Tourism Ireland Marketing Plans
Mourne Gullion Strangford Aspiring UNESCO Global Geopark – Ten Year Masterplan 2020 – 2030	Department for the Economy Economic Strategy
NMDDC - Tourist Accommodation Scoping Study for Destinations Mourne Mountains & Ring of Gullion & Strangford Lough	Department of Culture, Arts and Heritage: A Way Forward

Department for the Economy Economic Vision (2024):

- **Good jobs:** increase the proportion of working-age people in good jobs
- **Regional Balance:** address economic disadvantage to ensure that all people have the same opportunity to earn a living
- **Raise Productivity:** increase outputs per worker
- **Net Zero:** build a green economy and measurably reduce climate emissions

Across all Newry Mourne Down District Council policies, there is a commitment to creating opportunities for local communities to thrive by supporting sustainable economic growth over time and helping people to lead fulfilling lifestyles under five core values that underpin this plan:



1. We will be citizen focused and actively encourage citizen and community engagement, as well as being a listening and responsive Council.



2. We will be accountable and make decisions based on an objective assessment of need and operate in a transparent way as well as openly reporting on our performance.



3. We will be collaborative and actively encourage and pursue working in partnership, and at all levels, to deliver for our district.



4. We will be sustainable and will take into account the social, economic, and environmental impacts of our decisions on current and future generations.



5. We will be fair at all times and will proactively target actions at those who are marginalised within our community.

As an output from the research conducted, five overarching key strategic priorities and a growth target for tourism revenue generation have been established for the upcoming period 2024-2029.

These five strategic priorities, goals and associated actions have been consciously created in a way that aligns with NMD's ethos of placing sustainability and social inclusion at the heart of all decision-making.

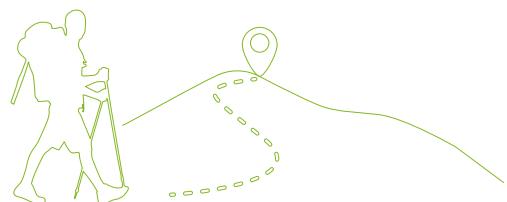
1.2. Sustainability, Strategic Priorities and Goals

Sustainability is an inherent hallmark of NMD as emphasised in NMDDC's core values and the Tourism Strategy 2017-2021, championing a balanced and holistic approach that prioritises:

- safeguarding the environment
- supporting the local community
- supporting livelihoods and the economy

This approach, which is fundamental to the vision, ambition and aims of this plan, is outlined in further detail under the following headings:

- The framework for sustainable tourism development
- Sustainable travel solutions
- People, place, and the local economy
- Aligning strategic priorities with sustainable tourism development



The framework for sustainable tourism development

The Mourne Gullion Strangford UNESCO Global Geopark – Ten Year Masterplan 2020 – 2030 provides the framework for sustainable and regenerative tourism development, outlining how achieving UNESCO Global Geopark status “provides a significant impetus in developing the region as a leading sustainable tourism destination.” This plan states that while the three designated Areas of Outstanding Natural Beauty (Mourne, Gullion and Strangford) are mainly focused on the management of the landscapes and the communities within their respective catchments, the UNESCO Global Geopark takes a more holistic approach (including via sustainable tourism development) across the unified Mourne Gullion Strangford geography.

Within this context, the plan advocates for the development of a sustainable tourism destination and industry through a range of sites, authentic experiences, activities, accommodation, and events which complement and enhance the unique character of the Geopark’s geological landscape. The plan emphasises that this development must happen in a responsible way that champions conservation and education so that the destination’s tourism assets, landscape, built heritage and cultural heritage can be

- celebrated and appreciated by contemporary generations
- protected, preserved, and celebrated by future generations

This plan and the sustainable tourism development strategy for the destination is thereby mindful of its responsibility to care for both the environment and local communities by keeping abreast of challenges such as

- managing visitor volumes
- promoting responsible tourism practices by visitors
- addressing sustainable travel solutions and itineraries

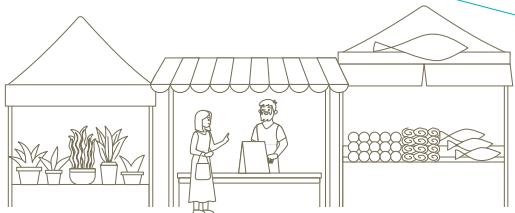
Sustainable travel solutions

The Newry, Mourne and Down Active Travel Plan specifically addresses the provision of infrastructure and communications to promote sustainable travel solutions such as walking, cycling and public transport for the benefit of local people and visitors. The recommended methodology for achieving this includes using road spaces and railways more efficiently along with improving connectivity across the region and to key tourism sites.

The Active Travel Plan also sets out the ambition to further develop greenways in the destination. An example includes the Newry to Dundalk Greenway that has been identified for development as a 42-kilometre route encompassing the spectacular shoreline of Carlingford Lough (with some phases already completed and other sections currently under development). Additionally, the consultation process for this plan has requested investment in a feasibility study to consider a Blueway development on Newry Canal.

The Tourism Strategy Plan 2024-2029 fully aligns with the intentions expressed in the Newry, Mourne and Down Active Travel Plan and the Mourne Gullion Strangford UNESCO Global Geopark – Ten Year Masterplan 2020 – 2030. This will manifest in many ways, including by

- promoting existing and future sustainable travel solutions to explore the destination, including via existing and future greenways and blueways
- supporting tourism providers with
 - the development of sustainable experiences that attract responsible visitors
 - the delivery of experiences so that visitors are advised about how to engage respectfully within the destination
- creating itineraries for visitors that champion sustainable experiences and sustainable travel solutions



People, place, and the local economy

While the vision for the Mourne Gullion Strangford UNESCO Global Geopark – Ten Year Masterplan 2020 – 2030 highlights the importance of place (a place “born of fire and shaped by ice”) and people (“cared by its people and shared with others”), the Tourism Strategy Plan 2024-2029 will be equally mindful of supporting livelihoods and the local economy within the context of sustainable tourism development.

Mourne Gullion Strangford UNESCO Global Geopark-born of fire and shaped by ice, cared by its people, and shared with others.

Today’s visitors seek experiences that showcase the unique stories of local people, their customs, traditions, and passions as well as the character of the places they call home, across both urban and rural destinations. Quality tourism experiences are thereby delivered by people from all walks of life including from farmers and fishermen to musicians and weavers. Depending on the nature of the experience offered, tourism can either fully or partially support a livelihood, benefiting the local economy while allowing the provider to stay in their homeplace. With reports published by national tourism bodies emphasising a rising demand for sustainable tourism destinations where money spent goes back to local communities, this approach benefits the region, destination Northern Ireland, and the visitor.

Aligning strategic priorities with sustainable tourism development

For the Tourism Strategy Plan 2024-2029, each of the five strategic priorities are positioned within the destination’s sustainable tourism development framework. Via the consultation process, it was strongly noted that sustainable and regenerative tourism practices have been an integral part of NMD’s strategy for more than a decade. For many NMD tourism businesses, a sustainable and regenerative approach is naturally ingrained into their operations.

Going forward, NMD will amplify communications regarding its long-standing commitment and performance in this regard. The vision is to position NMD as a global leader and advocate for sustainable tourism within a destination that is home to more than

- 100 miles (160 kilometres) of coastline
- 600 square miles (1,600 kilometres) of premier outdoor landscape

As part of this process, tourism businesses will be equipped with the knowledge, support, metrics, and roadmap that can enable them both individually and collectively to represent NMD as confident communicators of the sustainable and regenerative tourism practices in this destination. Taking care to adopt a multi-layered approach (working at tourism business level, community level, and council level), the aim is to ensure that NMD’s goal of becoming a recognised leader in sustainable tourism is fully realised.

1.3. Social Inclusion

Just as this plan places sustainability at the heart of all tourism development, social inclusion is a key pillar that similarly underpins all strategic priorities. The commitment to social inclusion is evident throughout all NMDDC's strategies including the Living Well Together A Community Plan for Newry, Mourne and Down to 2030, NMDDC Active Travel Masterplan and the Mourne Gullion Strangford UNESCO Global Geopark – Ten Year Masterplan 2020 – 2030 that emphasises as a key aim the *“promotion of inclusion in all processes from governance to implementation activities, thus providing an equality of access and opportunities for citizens of and visitors to the Geopark.”*

Noting that inclusion is also a key stated priority in The Department for the Economy's Tourism Strategy for Northern Ireland - 10 Year Plan, the Tourism Strategy Plan 2024-2029 commits to positioning NMD as a sustainable and socially inclusive tourism destination that is mindful of the needs of all, including visitors with physical, mental and intellectual difficulties.

Guided by experts, relevant stakeholders, organisations, and local tourism businesses with established social inclusion practices, all sectors of the tourism and hospitality industry will be supported to be proactive about responding to the needs of visitors, including via communications, experience, and service delivery.

1.4. Five Key Strategic Priorities

Noting that sustainable tourism development and social inclusion underpin all ambitions and actions within the Tourism Strategy Plan 2024-2029, the five strategic priorities for the duration of this plan are



1. Invest in communications
- 1.1 Raise the profile of NMD's new destination brand



2. Invest in NMD's community



3. Maximise economic advantage



4. Engage in data collation and analysis



5. Prioritise investment in tourism-related infrastructure



Strategic Priority 1: Invest in Communications

Key Actions to include

The creation of a new Vision Statement and Value Proposition that defines NMD's offering as a tourism destination

Ensuring that NMD emerges as a landmark tourism destination, rather than as a gateway to other locations (e.g., Dublin and Belfast)

Continued investment in experience development (defined as a destination game changer for the period 2017-2022) to include:

- developing a dedicated collection of outdoor activities and adventure experiences
- maintaining the focus on experiences that
 - connect authentically with the local community
 - showcase themes that are intrinsic to NMD such as mountains, maritime, and legends
 - function as a collective to maximise opportunities for NMD across themes encompassing food and drink, culture and heritage, outdoor activities and adventure, and wellness

It is clear that NMD has matured and grown in confidence as a tourism destination over the past five years. To advance that success in the upcoming years, communications have emerged as a high priority with key actions to include:

Maximising opportunities for NMD's tourism offering via clear offline and online communications under the following categories:

- natural assets: places of interest and natural beauty from land to seascapes
- experiences, ordered under the following sub-categories
 - culture and heritage
 - food and drink
 - outdoor activities and adventure (including world-class golf)
 - wellness
- visitor attractions
- events and festivals
- accommodation providers
- places to eat and drink
- ways to get around: from public to private tourism transport options

- Positioning NMD via communications as a
 - global leader for sustainable tourism (ensuring that tourism businesses are equipped with the knowledge, support, metrics, and roadmap to act as confident communicators of NMD's sustainable/ regenerative tourism ethos and approaches)
 - tourism destination that places social inclusion at its heart
 - primary outdoor, activity and adventure destination in Ireland



- Ensuring that communications are used proactively and effectively to connect and promote positive relationships across NMD's
 - tourism industry
 - local community
 - national and global collaborative partnerships

The adoption of a "ground-up" approach that showcases NMD's tourism industry from the human perspective of local people who work within it

Aligning with the strategic themes in The Department for the Economy's recent Tourism Strategy for Northern Ireland - 10 Year Plan: innovation, inclusion, sustainability, attractiveness, and collaboration



Strategic Priority 1.1: Raise the profile of NMD's new destination brand

During the consultation process, the ask to redefine the destination's brand became clear. As the specific purpose of this plan is to provide strategic guidance that can enable NMD to maximise opportunities as a tourism industry and destination, a separate consultation process was conducted to address the destination's branding.

The outcome of this consultation process has defined *Mourne Gullion Strangford* as the geo locator and *Ireland's True Nature* as the overarching tourism brand essence, positioning NMD as an unparalleled destination with a breath-taking natural landscape, people who are genuine and

welcoming, a rich cultural heritage, quality food and drink, and expansive spaces for outdoor recreation.

With the aim of ensuring that NMD aligns with premier regional destinations in Ireland (e.g., Causeway Coast and Glens, the Burren, Connemara, the Boyne Valley) and globally (e.g., Loire Valley), this brand will be the destination's defining brand for the future.

As the redefined destination brand aligns with Northern Ireland's *Embrace A Giant Spirit* destination experience brand, which in turn aligns with other Ireland brands including Wild Atlantic Way, Ireland's Hidden Heartlands, Ireland's Ancient East and Dublin Surprising by Nature, all relevant internal and external stakeholders and authorities (e.g., Tourism Northern Ireland and Tourism Ireland) will be informed of NMD's revised branding and how to engage with same.



Strategic Priority 2: Invest in NMD's Community and Partners



For the Tourism Strategy Plan 2024-2029, NMD's community references:

- tourism industry businesses and entities: including accommodation providers, experience and activity providers, visitor attractions, event and festival providers, places to eat and drink, and tourism-relevant transport providers
- the local
 - resident community
 - business community
- tourism agencies: Tourism Northern Ireland and Tourism Ireland
- engagement with councils in Northern Ireland and the Republic of Ireland
- visitors from Ireland and global markets
- professional travel buyers: leisure and business tourism
- partnerships and alliances in Ireland and globally that benefit NMD

Stakeholder engagement with tourism businesses confirms that over the past five years, a lot has been achieved to promote connections and collaboration. For example, significant progress has been made with developing alliances and partnerships:

- between NMD tourism businesses: e.g., via networking events and professional development programmes
- alliances that benefit NMD tourism businesses: e.g., Strangford Lough cluster
- close collaboration with national tourism agencies: Tourism Northern Ireland and Tourism Ireland, ensuring that their guidance informs NMD's tourism strategy
- cross-council initiatives: e.g., the Memorandum of Understanding with Louth
- between NMD tourism businesses and professional travel buyers: e.g., via

attendance at trade events in Ireland and global markets

- global partnerships and alliances: e.g., Atlantic CultureScape intangible cultural heritage experience development global partnership project, led by NMDCC

In the upcoming years, NMD intends to expand on this collaborative approach. For example, via consultation for this plan, NMD's tourism industry has requested to increase partnership opportunities by scheduling networking and familiarisation trips during low season periods.

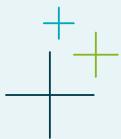
While maximising opportunities via leisure tourism will remain the primary focus, NMD will additionally explore the destination's potential for business tourism. In this regard, establishing connections with NMD's local business community will be key for securing corporate meetings, conferences, incentives, and events from Ireland and global markets.

Engaging NMD's local resident community with the destination's tourism industry and offering will be a key priority over the coming years. The purpose of this action is to raise awareness within the community about

- what NMD's tourism offering is and how it can benefit local people
- the makeup of NMD's tourism industry and how it is comprised of local businesses
- how NMD successfully competes in domestic and global markets
- the expectations of visitors and how to engage with them

Under this priority, initiatives such as Local Experts Programmes should be considered so that community-based networks are created that are

- informed about NMD's tourism offering
- equipped with the know how to:
 - share knowledge about NMD's tourism offering
 - interact positively with visitors to NMD
 - engage and partner with representatives from NMD's tourism industry



Strategic Priority 3: Maximise Economic Advantage

Building on the successes achieved to date, the upcoming years 2024-2029 are critical for positioning NMD as a landmark tourism destination in Ireland. While all five strategic priorities in this plan contribute towards achieving this goal, addressing the economic impact of tourism is essential for supporting livelihoods, job creation, and the local economy via revenue generation.

In tourism, economic advantages are achieved via targeted commercial strategies where smart choices must align with expertise and resources (time, human, and financial). Maximising opportunities that align with sustainable tourism development is about being goal-focused and

knowing how to expertly integrate diverse sales channels, markets, customer segments, and commercial functions (e.g., proactive and reactive sales, PR, and marketing) to match the profile of the tourism destination and its industry.

Within this framework, via the Tourism Strategy Plan 2024-2029, a multi-layered, two-pronged approach is proposed that focuses on maximising commercial capabilities to win leisure and business tourism opportunities by a) empowering NMD's tourism industry with the required skills and expertise while b) NMDDC providing support at destination level.



a. maximise economic advantage within NMD's tourism industry:

- **tourism businesses:** support the creation of tailor-made commercial strategies aligned with the unique resources and expertise of each business
- **tourism industry:** ensure that tourism businesses across NMD collaborate and form partnerships to maximise commercial opportunities
- **tourism industry and the local community:** raise the profile of NMD's tourism offering among the resident and business community to maximise collaborative and commercial opportunities

b. maximise economic advantage at destination level supported by NMDDC

- raise the profile of the destination and its tourism industry (e.g., via branded destination digital channels)
- complement/reinforce the activity of NMD tourism businesses at destination level (e.g., via attendance at domestic and global trade shows generating referral opportunities for NMD businesses)

Under this key priority, NMD will focus activity on growing market share from the Northern Ireland and Republic of Ireland (ROI) markets. NMD's intention to win share from the ROI market aligns with Tourism



Northern Ireland's strategy that sets a target of winning 10% of ROI's market value, equating to £193 million (+€47.2 million and +7.6% CAGR).²

Regarding global market share, for 2024-2029 NMD will focus its priorities on the following:

- Great Britain
- North America
- Nordics and Netherlands

As there is a need to increase capabilities in NMD for the effective management of non-English speaking markets (e.g., by delivering experiences in global languages), the German, French, Spanish, and Italian markets that are key for Ireland will be a second tier focus for NMD.

Throughout 2024-2029, it is recommended that NMDDC supports its tourism industry with a) understanding and addressing the needs of these markets and b) the benefits of engaging with these markets so that

- competencies for engaging in these markets are improved during this plan's lifetime
- opportunities via these markets are maximized 2024-2029
- NMD is placed to win opportunities via these markets beyond this plan's lifetime
- NMD enhances its capacity for welcoming visitors from English and non-English speaking markets that are key for Ireland

² Tourism Northern Ireland's Republic of Ireland Market Strategy 2021-2026

Strategic Priority 4: Engage in Data Collation and Analysis



As a key priority for 2024-2029, NMD should embed data collation and analysis in its tourism culture so that whenever possible, objectives, goals, and targets can be objectively assessed and measured ensuring that

- strengths are identified and maximised
- weaknesses are identified and corrected
- threats are identified and addressed
- opportunities are identified and targeted
- sound data analysis is available to:
 - inform future NMD tourism strategies
 - support NMD grant applications
 - attract investment into NMD (e.g., hotel investment)

The status of targets set via NMD will be determined via diverse methods of measurement, ranging from community and customer sentiment data to economic and environmental impact data. For 2024-2029, the inclusion of the following data collation sources should be considered:

- Northern Ireland Statistics and Research Agency (NISRA)
- Relevant data available to NMDDC such as
 - NMD's resident survey
 - Visitor counter data (e.g., gathered at events and festivals)
 - Market research data (e.g., conducted at events and festivals)
- Tourism Northern Ireland data analytics and reviews

- Tourism Ireland data analytics and reviews
- External data intelligence and global benchmarking (e.g., independent hotel benchmarking)
- Data submitted centrally to NMDDC via NMD tourism businesses according to an agreed mechanism
- Data collated by NMDDC's geopark team that inform and guide the approach for safeguarding the region's environment and reducing emissions

The habit of collating and analysing tourism-relevant data needs to be established a) within independent tourism businesses and b) at destination level via NMDDC. The outcomes of this activity must be used constructively to benefit NMD's tourism industry by

- providing tourism businesses with bespoke supports so that they are informed about
 - what data to collate
 - what mechanisms to use for recording data
 - how to use data to make informed decisions that can maximise opportunities
- providing summary updates (e.g., annually) of data collated centrally via NMDDC so that the tourism industry has a) an objective assessment of the destination's performance and b) robust direction for new and evolving actions and strategies that can benefit tourism businesses and NMD as a destination.





Strategic Priority 5: Prioritise investment in tourism-related infrastructure



While NMD has the clear potential to progress as a tourism destination 2024-2029, to maximise this opportunity continued investment is required in tourism-related infrastructure. Under this strategic priority, NMD should

- **elevate the quality of the tourism offering and infrastructure:** by continuing to invest in similar projects initiated over the past five years: e.g., Tyrella beach, Delamont Country Park, Camlough Lake Recreational Hub, Castlewellan Historic Demesne, Narnia Experience Rostrevor, and Mourne Gateway Project
- **proactively seek investment in sustainable accommodation solutions across all categories** (e.g., self-catering, caravanning and camping, guesthouses and hotels), noting
 - over the past ten years there has been a limited increase in hotel rooms, with NISRA data showing that 33 rooms (providing 70 additional beds) were added between 2015 and 2019³
 - hotel accommodation represents just 26% of total bed inventory in NMD: 61% of accommodation is provided by self-catering and guesthouse/bed & breakfast⁴
 - without this investment, the opportunity to increase visitor dwell time in NMD and associated spend will be significantly curtailed
- **continue to invest in NMD's hub communities** which encompass the destination's city, towns, villages, and rural communities. This action should include:
 - continued investment in the design and delivery of public realm improvements⁵
 - integrating the hub communities with the wider tourism offering e.g., by enabling residents and non-tourism businesses to understand and refer local tourism experiences and places of interest

- ensuring that NMD can achieve its ambition to become a landmark tourism destination by improving the quality of the visitor experience in Newry as NMD's only city: this action has been called out strongly via consultations, for example via professional travel buyers

As part of this ambition, the plan recommends investment in a feasibility study to consider a Blueway development on Newry Canal alongside raising the profile of the historic Newry Canal (1742) that is the first summit level canal to be built in Ireland or Great Britain.

- **continue to improve wayfinding and signage in NMD** so that places of interest can be easily found, and opportunities can be maximised for tourism businesses

It is important to note that investment in tourism-related infrastructure provides wide- ranging benefits that encompass

- improving the experience for visitors
- maximising opportunities for NMD's tourism industry
- improving the quality of life (including the generation of social and economic benefits) for NMD's local community
- contributing toward the achievement of the growth target set out in this plan
- attracting and retaining high-spend customers
- increasing dwell time and spend by visitors in NMD
- achieving NMD's ambition to become a landmark tourism destination

³ NISRA Northern Ireland Local Government District Tourism Statistics 2013-2019

⁴ NISRA Northern Ireland Local Government District Tourism Statistics Newry/Mourne Down 2019

⁵ NMDDC's Regeneration and Economic Development Strategy 2022-2025

1.5. Growth Target

At the time of writing this report, the global tourism industry is in an uncertain place due to a wide variety of factors ranging from the unprecedented disruption caused by the Covid-19 pandemic to global economic and geopolitical unrest.

Within Northern Ireland and NMD, diverse challenges are manifest including

- the cost-of-living crisis emerging as a primary concern among customers⁶
- evidence of the erosion of Northern Ireland's value for money rating⁷
- the trend toward last-minute booking, making it difficult to predict future performance
- limited hotel capacity in NMD, impacting the potential to increase dwell time and maximise commercial opportunities
- the Covid-19 pandemic has disrupted the collation of data, including via NISRA

While the challenges are clear, in the current environment these co-exist with more optimistic considerations including

- Both the Department of the Economy's Tourism Strategy for Northern Ireland – 10 Year Plan and Tourism Ireland emphasise future growth in the value of tourism in Northern Ireland:
 - The Department for the Economy's recent **Tourism Strategy for Northern Ireland - 10 Year Plan** sets out the strategic aim of increasing the value of tourism to the Northern Ireland economy by 50% -75% compared to 2019, or growth of 4%-6% per annum.

- The **Tourism Ireland Marketing Plan** (issued 2024) sets targets of driving tourism revenue growth in Northern Ireland by +6.5% year-on-year to 2030. This is compared to targeted island of Ireland growth of 5.6% average year on year growth to 2030.
- World Travel & Tourism Council Economic Impact 2022
 - predicting a strong decade of growth
 - estimating that the sector's performance in Europe could surpass 2019's level in 2024 when Travel & Tourism contribution to the region's GDP could reach 4.1% above the pre-pandemic amount
- NMD is well placed to reap the benefits of proactively promoting the destination's profile over the last five years. For example
 - via extensive engagement with travel trade: e.g., via trade shows and familiarisation trips
 - by consistently promoting offers and things to do through digital sales channels: e.g., via the destination's website and social media channels
 - by partnering with organisations that can raise NMD's profile: e.g., Ireland's Association of Adventure Tourism Conference November 2022 and Taste of Tourism February 2023 in association with the Northern Ireland Hotels Federation
 - by positioning NMD as a new tourism destination offering in Ireland that (following its first ever tourism plan 2017-2021) is undergoing a growth phase, with leverage to escalate growth during 2024-2029 and beyond

⁶ Tourism Northern Ireland Consumer Sentiment NI Market April 2022 Report

⁷ Tourism Northern Ireland Tourism 360° July 2022

Bottom line

At this point in time, nobody can predict with confidence what will happen in the future. While reports and opinion vary, NMD's tourism industry has asked for ambition. Conscious of rising inflation, the industry has also cautioned against standing still. Instead, they have emphasised the need to

- maximise opportunities for NMD via continued promotion in Ireland and globally
- achieve the revenue generation required to a) maintain existing tourism jobs and b) drive new job creation

Following an analysis of historic data collated by NISRA, combined with diverse consultations (including Tourism Northern Ireland, Tourism Ireland, and the Ulster University's Economic Policy Centre), NMD has set a target to increase revenue generation via tourism by 34% in 2029 compared with 2019.

The below chart indicates how this target can potentially translate for overnight stay revenue generation in NMD.

Revenue Generation via Overnight Stays 2019 versus 2029

Heading	2019	2029
Revenue Generation ⁸	£84,000,000*	£112,760,000

NOTES:

- This measurement is based on revenue generation via overnight stays in NMD
 - *£84,000,000 equates to 1.6m bed nights
- The chart serves for comparison purposes only
 - any potential future changes to hotel inventory (e.g., via investment that increases bed capacity) are not factored in
- Data source: NISRA 2019 statistics

Data collation

Under *Strategic Priority 4: Engage in Data Collation and Analysis*, the collation of data in NMD will be proactively encouraged at a) tourism business level and b) at destination level, via NMDDC. Therefore by 2029

- individual tourism businesses in NMD can assess performance against this target
 - including accommodation providers, experience and activity providers, visitor attractions, event and festival providers, places to eat and drink, and tourism-relevant transport providers

- NMD as a destination can assess performance against this target via data centrally collated by NMDDC
- NMD will have a record of district-specific data and trends that can reliably inform future growth and targets

⁸ Revenue generation 2019: Northern Ireland Statistics and Research Agency



1.6. Benefits of the Plan

The benefits that can flow from this Tourism Strategy Plan 2024-2029 are

Maximising opportunities for NMD, generating economic and social benefits.

Positioning NMD as

- a landmark tourism destination with a
 - wealth of natural assets
 - beautifully crafted, market-ready authentic experiences across the themes of food and drink, culture and heritage, activity and adventure, and wellbeing
 - vibrant annual events and festivals calendar
 - thriving hub communities: cities, towns, and villages
- an integrated tourism offering with a team NMD approach that connects accommodation providers, experience and activity providers, visitor attractions, event and festival providers, places to eat and drink, and tourism-relevant transport providers under a defined brand
- global leader and advocate for sustainable and regenerative tourism supported by tourism businesses that are confident communicators of NMD's ethos
- a primary outdoor, activity, and adventure destination in Ireland

Maximising social, promotional, and economic opportunities and benefits via a

- targeted communications and commercial strategy
- strong alliances and collaboration
 - within NMD's tourism industry
 - between NMD's tourism industry and local community
 - via national and global collaborative partnerships

Enabling NMD to make informed strategic decisions based on sound data.

Improving the quality of living standards for the local community and the experience for visiting customers.

Putting NMD in a position to attract investment.

2. Vision & Value Proposition

The vision statement and value proposition form the foundation for all activities conducted by NMD in collaboration with tourism stakeholders.

While the vision statement summarises what the destination represents and what it intends to become in the future, the value proposition is created from the visitor's perspective. Accordingly, the value proposition serves to

- identify the benefits that NMD can deliver for its customers
- differentiate NMD and its tourism offering in the marketplace
- clarify NMD's target customers and markets

Strategic plans, annual plans, and actions must align to the vision statement and value proposition. They are ideally used when engaging with diverse stakeholders (e.g., domestic/global tourism associations, and partners) and procuring diverse services (e.g., PR opportunities and advertising) so that the destination's offering, aims, and objectives are clearly understood.

The vision statement and value proposition have been created following consultation with NMD's tourism industry. These are working documents and can change over time as the destination evolves and as the external environment changes.



2.1 Vision Statement

As a warm and welcoming people, we are proud to live in a destination of outstanding natural beauty with more than 100 miles (160 kilometres) of coastline and 600 square miles (1,600 kilometres) of premier outdoor landscape.

Situated in a prime north-eastern location, mid-way between Dublin and Belfast, our community encompasses the people, vibrant hubs, land, and seascapes of

counties Down and Armagh, with awe-inspiring expansive panoramas from the Mourne Mountains and Ring of Gullion to Strangford and Lecale.

Abundant with a sustainable rich cultural heritage, outdoor and adventure experiences, locally crafted artisan food and drinks, world-class golf, and a vibrant calendar of year-round events and festivals, our home is captivating.

Our story is like no other. As people, we are earthy, grounded, creative, and resourceful. The hallmarks of who we are today have evolved over centuries through repeated significant moments in history. These include



Ireland's earliest farmers who chose to settle in our community more than 5,000 years ago, due to an abundance of fertile soil and pure water



Saint Patrick, who in 432AD, chose our community to establish his first church in Ireland, singling us out as the cradle of Christianity



The poets, musicians, and storytellers of Oriel who, in the 18th and 19th centuries ignited a cultural renaissance in Ireland



The stone masons who, with their bare hands, achieved the remarkable feat of building the 22 mile long (35-kilometre) granite Mourne Wall across 15 different mountains (1904- 1922)

Building on the legacy of our ancestors, our modern rhythm of life is defined by a rich heritage, authenticity, resilience, and integrity. Collectively, we work hard for our achievements and are united in our goal for our home to become a renowned year-round destination, with sustainability and social inclusion at its heart for our local community, partners, leisure, and business visitors.

2.2. Value Proposition

Through tourism, we share the story of people and place. This tourism destination thereby, firstly represents and serves the local community, while extending the warmest of welcomes to visitors from Ireland and global countries.

Encompassing counties Down and Armagh, with

three designated Areas of Outstanding Natural Beauty (Mourne, Ring of Gullion, Strangford and Lecale), this visibly beautiful place has its own natural rhythm of life founded on traditions, authenticity, sustainability, resilience, and a giant-hearted spirit that champions social inclusion.

To inform and inspire our community, visitors, and partners, our brand essence is defined as Ireland's True Nature to mark our unparalleled destination, that is home to the Mourne Gullion Strangford UNESCO Global Geopark.

Within 600 square miles (1,600 kilometres) of premier outdoor landscape and 100 miles (160 kilometres) of coastline, our home offers a wide menu of activities and tourism experiences for locals and visitors including



Culture and heritage: from being the beating heart of Saint Patrick's story to the Ulster Scots who settled here, crafts, farming, music, sports, and language



Food and drink: from Ireland's first craft chocolate factory to award-winning breweries, distilleries and a cidery, clover farms and beekeepers, world class chefs, bakers, and foragers



Adventure/outdoors: from walking, biking, hiking, and horse-riding to world-class golf, and water activities



Wellness: from mindfulness experiences to luxury spa escapes



Events and festivals: a year-round calendar of community and large-scale events

Complimented by a wide range of private and public transport options, restaurants, cafés, bars, and accommodation from high-quality glamping, self-catering cottages, B&Bs and guesthouses to 3, 4 and 5-star hotels, this destination is naturally suited to the leisure traveller, including individuals, couples, families, adventurers, golfers, culture and heritage enthusiasts, foodies, special-interest, and inter-generational groups.

The destination is also ideally suited for business tourism travellers, with event spaces for up to 700 delegates and capacity for small meetings, conferences, and incentive groups for between 8 and 300 people.

For the local community, leisure, and business tourism visitors, this destination promotes social inclusion and sustainability as core destination hallmarks through

a balanced and holistic approach that

- safeguards the environment
- supports the local community
- supports livelihoods and the economy

We welcome everyone who shares our ethos and values.





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