Experience Development Roadshows

Experience Development – Thematic Priorities

Tourism NI Thematic Areas

Northern Ireland – Embrace a Giant Spirit

- Food & Drink
- Landscapes & Outdoor Activities
- Culture & Heritage

Food & Drink

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Tourism Manager- Food & Drink

Food & Drink Chain

Leveraging the Brand

- Showcase the quality of experiences that underpin the brand inspirers **Big Hearted, Original, Legends & Stories and Land, Water & Sea**
- Continued and sustained promotion of our food and drink icons, PGI products, Iconic brands, the traditional pub & must do food and drink experiences
- Leverage our potential as a destination with strong sustainability credentials
- Adopt a consistent narrative around food and drink in Northern Ireland
- Make the ordinary, Extraordinary!
- Play on our strengths but be prepared to act on areas where we are not delivering on our promise

- Over **11.3 million tourists** were welcomed on the island of Ireland in 2019, generating **£5.1 billion**. Food & Drink expenditure accounted for **37% of visitor spend or £1.75 billion**

- In 2019, visitor spend in Northern Ireland broke the **billion-pound barrier**. Food & drink consumption accounts for around **35% of total visitor spend or £350m**

- Food motivated visitors are of **significant value**, tending to spend more, stay longer and often buy products both in destination and when they return home

Our Giant Ambition

1. Position Northern Ireland as a leading Food & Drink destination of choice

2. Increase the availability of demand generating food & drink tourism experiences across all parts of Northern Ireland

3. Build the commerciality and capacity of food and drink experiences to deliver world class, sustainable, and profitable tourism experiences

4. Intensify our efforts to ensure that food & drink features, and is championed throughout the collective marketing of the destination

5. Support our industry to develop and share the Northern Ireland food & drink story

Today's Visitors

Are more independent and knowledgeable

- Associate holidays and short breaks as an experience
- Are concerned with the sustainability and the environment
- Seeking active over passive food experiences
- Want exclusivity
- Spending more on food & drink
- Multigenerational trips built around quality time & eating together
- Pairing Food with other interests
- Seeking experiences that are unavailable where they live

Food & Drink Trends

increased by evolving consumer preferences, travel behaviours and global developments.

- Sustainable and locally sourced ingredients- visitor prioritising choices that source ingredients locally and promote responsible practices.
- Hyper local- food that showcases ingredients that are unique to the region and reflects the seasons.
- Food and drink- pairing food with craft spirits, beers and cocktails with a local twist.
- Culinary collaborations- chefs, restaurants, and businesses collaborating to offer a unique dining experience- secret dining, chefs table, outdoor dining in unique locations.
- Health, lifestyle, and dietary preferences- outlets that adapt to accommodate a variety of dietary preferences and restrictions
- Community driven- experiences that demonstrate collaboration with local communities that benefits both visitors and communities.
- Street food and food trucks- the popularity of more casual dining options will continue to grow, offering affordable and diverse experiences in urban and rural settings.

SWOT Analysis Food & Drink

Value for Money: NI viewed as offering better value for money when compared to RoI & GB

Immersive Experiences: Quality of immersive Food and Drink experiences linked to Embrace a Giant Spirit Brand

Sustainability Merged Innovation: Range of Food and Drink experiences that proactively demonstrate their commitment to seasonal ingredients and local produce

Highly Independent: Leverage the range and quality of our independent restaurants and pubs

Land, Water & Sea: Abundance of natural, traceable and high-quality ingredients

Food & Drink Networks: Existence of established and emerging regional clusters and networks

Drinks led experiences: Depth of whiskey, spirit, cider and brewery experiences available across NI

Personalities: Existence of strong food & drink personalities driving the destinations profile as a great place to eat/ visit

Iconic Brands: Iconic NI Food & Drink brands that can help achieve standout and recognition for the region e.g. Bushmills Whiskey, PGI Armagh Bramley Apple, Lough Neagh Eel, Comber Earlies

Lack of Awareness: Visitors have low levels of awareness of Northern Ireland as a leading food & drink destination- a perception gap still exists!

Access and Availability of Food & Drink Experiences: Limited spread of experiences across each of the regions

Evening/ Night-time Experiences: Limited supply of Food & Drink evening time experiences, including urban areas, with few operating beyond 6pm

Festivals and Events: Outside of a small number of key festivals and events, the opportunity to extend the season through Food & Drink festivals & events is limited

Linking Destinations: Lack of integration and linking of Food & Drink experiences contributing to visitor perception of the destination being fragmented and difficult to access and navigate

Digital Presence: Digital Presence and online capabilities appear low in creating consumer wide awareness of available Food & Drink experiences

Marketing: Inconsistencies with Food & Drink marketing messages and brands

Scalability: Limited capacity and capabilities amongst small businesses in addition to succession planning and future proofing

Embracing our Tourism Brand: Widening opportunities for the Food and Drink Industry to promote the wider destination through adopting and utilising Embrace a Giant Spirit

Sustainability/ Regeneration: Leverage our potential as a destination with strong sustainability credentials

Unique Food & Drink Experiences: Examine opportunities to deliver compelling experiences in exclusive or premium venues for high end consumer, incentive, and travel trade market

Pride and Profile: Raise visibility of NI as a foodie destination through an international network of champions/ ambassadors

Protecting & Sustaining Local Food Culture: Increase the number of food and drink providers across Northern Ireland who serve up local and authentic meals to help protect and sustain local food culture

Increased Competition: Significant competition from other destinations who are more advanced with Food & Drink development

Industry Confidence: Confidence among the industry to develop and invest in new experiences impacted by prevailing macro-economic conditions

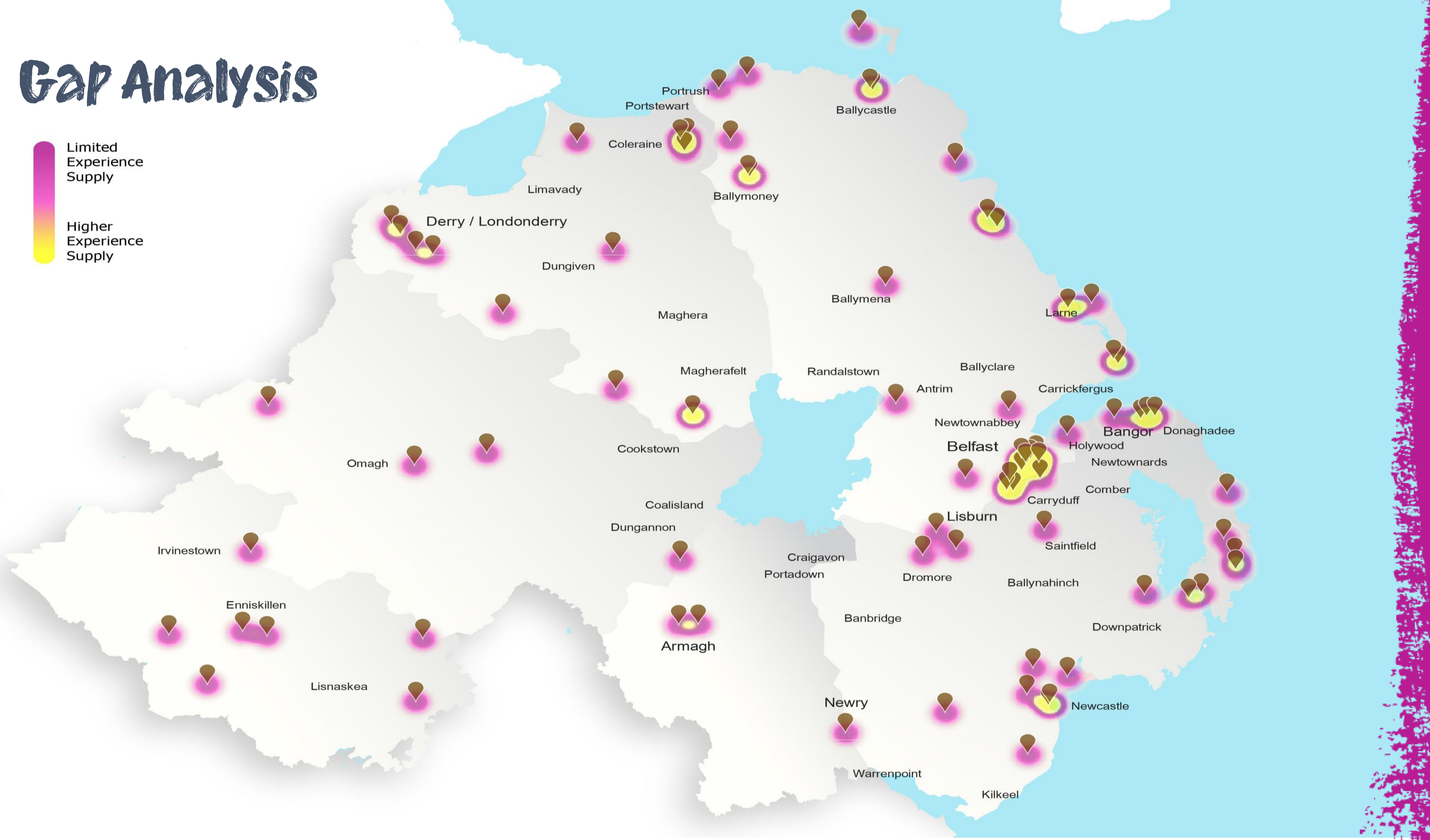
Business Continuity/ Operations: Impact of global shocks on the industry to sustain operations and financial stability

Exchange Rate: Impact on key markets

Talent Attraction & Retention: Across all components of the Food & Drink sector

Supply & Demand: Supply that adapts to mass volume but not to Food & Drink tourists

Gap Analysis



Northern Ireland Snapshot

County	% of overall food & drink products NI	Number of Food & Drink Experiences
Antrim	37%	31
Down	27%	23
Derry/ Londonderry	14%	12
Armagh	9%	8
Tyrone	7%	6
Fermanagh	5%	4

Antrim dominates the Food and Drink scene in Northern Ireland, accounting for more than a third of the overall offerings. Of the Antrim Food and Drink Experiences, 55% (17/31) are in Belfast. County Down then follows, representing 27% of the overall offerings. Derry/Londonderry represents 14%, whilst the counties of Armagh, Fermanagh and Tyrone represent the smallest segments of Food and Drink Tourism in Northern Ireland.

Food & Drink Development

- Experience Development Plan- Food Drink- 3–5-year Plan (Consultation)
- Embrace a Giant Taste Toolkit
- Research, consumer sentiment and visitor insights
- Cost calculators and pricing templates
- Sustainability Resources
- Food & Drink Experience Development Programme- 14 early learner experiences being supported to deliver market-ready food and drink experiences 2023/4
- Expressions of interest welcomed from experiences that have the potential to improve levels of activity at off-peak times in addition to those that drive greater regional spread
- Phase 2 NI Spirit Trail to include new experiences including Belfast’ Titanic Distillers and McConnell's at Crumlin Road Gaol