

Northern Ireland Affairs Committee

Oral evidence: [Tourism in Northern Ireland](#), HC
2014

Wednesday 1 May 2019

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Members present: Dr Andrew Murrison (Chair); Mr Gregory Campbell; Maria Caulfield; Lady Hermon; Kate Hoey; Nigel Mills; Ian Paisley; Jim Shannon; Bob Stewart; Sir Desmond Swayne.

Questions 1-63

Witnesses

I: Odhran Dunne, General Manager, Visit Derry; Gerry Lennon, Chief Executive, Visit Belfast.

Written evidence from witnesses:

– [Visit Derry](#)

Examination of witnesses

Witnesses: Odhran Dunne and Gerry Lennon.

Q1 Chair: Good morning, gentlemen. It is great to see you here on this beautiful day. We as a Committee have felt it important to inquire into the state of tourism in Northern Ireland. There is a great deal going on at the moment; I am thinking particularly of Brexit and the need to ensure that we maximise the benefit that tourism brings to Northern Ireland. That is the background to what we are trying to do. Obviously, this is in the context of the lack of an Executive in Stormont, which means that this Committee has interpreted its role more broadly than would normally be the case. We get involved in areas which normally would be the matter of duly elected representatives at Stormont, rather than ourselves, but that is a force of circumstance.

Can I just start by asking you very briefly to introduce yourselves, the organisations that you come from and—because it is of interest to the Committee—how you are funded? Gerry, do you want to kick off?

Gerry Lennon: Thank you, Chairman. Good morning, members. Thank you for the opportunity to join you this morning to discuss tourism. My name is Gerry Lennon. I am Chief Executive of Visit Belfast. Visit Belfast is a public-private sector partnership. It is known in the business as a DMO, or a destination marketing organisation.

We are a partnership of 500 private sector businesses, Belfast City Council, Ards and North Down, Lisburn & Castlereagh, and to a lesser degree Antrim & Newtownabbey, Tourism Northern Ireland and to a lesser degree Invest Northern Ireland. In a real sense, we are a public-private sector partnership. We are funded 60% public sector, mainly Belfast City Council, and then 40% commercial or private sector.

Our focus or our mission in life is very simple. It is to drive visitor numbers and visitor spending in the city region. Our objectives are to increase overnight stays, increase the length of stay, spread the benefits throughout the city region and improve visitor satisfaction. We run and manage three tourist information centres, one in the city centre and the two airport TICs. We have a budget of about £4 million and we generate about £140 million. Our target this year is to generate £140 million of economic benefit into the local region. That is a return on investment of 33 to 1. Our focus primarily is overnight stays, city breaks, short breaks, conferences, meetings, incentives, conferences and exhibitions, and cruise ships. That is probably a good introduction to who we are and what we do.

Chair: Thank you.

Odhran Dunne: Good morning, everyone. Thank you very much for the opportunity to provide some evidence to the Committee for your inquiry



HOUSE OF COMMONS

into tourism. My name is Odhran Dunne. I am the General Manager of Visit Derry.

We are also a private-public partnership. We are a not-for-profit limited company. We are also a membership organisation. We have 280 businesses who are members of our organisation. Our role is to promote the city of Derry/Londonderry and the surrounding region, which encompasses the wider north-west area. We are supported in the public sector by Derry City & Strabane District Council and part-funded through an SLA with Tourism Northern Ireland. That is our public sector funding. Then we have to generate private sector income through advertising, sponsorship and through our membership base, which are the 280 members.

Like Gerry, our core functions are destination marketing, visitor servicing, industry engagement, working with the industry to build capacity and ensure the products are right for the tourists, and advocacy and influence, trying to inform strategy and develop strategy and partnership with the membership and with the Council, which is the lead in strategy development. We work with Tourism Northern Ireland and Tourism Ireland in the national and international markets to promote the city and get as many visitors to the north-west spending as much money as possible.

Q2 Chair: Thank you. The reason we are interested in the point about funding is that he who pays the piper calls the tune, in general. Although we like to think of tourism as being an unmitigated benefit, of course we have to ask who benefits. Tourism improperly applied can come with some penalty to some people. I am fascinated by this notion of who actually benefits from what you do. Clearly there is benefit to the economy, broadly defined, but there is also potentially a cost to various environmental assets, for example, from the activities of the tourism industry. I am guessing that because you are joint funded between public and private, as I understand it, there is a bit of a dynamic that goes on between those competing priorities. I wonder if you might be able to explain a little bit more about how you manage that.

Gerry Lennon: Just to put that in context in terms of the benefits, Chairman, think where Belfast was 20 years ago. Visit Belfast is actually 20 years old this year. It was set up by Belfast City Council in 1999, just after the Good Friday Agreement. There is a synergy there.

If you think where the city was and where it is now, the image makeover that tourism has brought to this city is not just about pounds, shillings and pence, important though they are. Lonely Planet says that Belfast is the number one place in the world to visit, Condé Nast says that Belfast is a rising star of city breaks in Europe, and C&IT Forum says that Belfast is the number one place in Britain to host a conference. They do not just bring huge economic benefits, such as 300% growth in overnight stays from 1999 or 300% growth in visitor enquiries. We used to have 4,000



HOUSE OF COMMONS

jobs in Belfast in tourism in 1999, and we now have 18,000 jobs. Those are tangible benefits.

By the way, just to be clear, in the last five years alone, £1.5 billion was spent by people staying overnight in the city. That £1.5 billion was a catalyst for £150 million of pure private sector money—no public money going into it—to build six new hotels and create 1,000 to 2,000 new jobs. It just shows you that when the public sector puts its money in the right place in terms of visitor attractions and attractors, the private sector will come in.

One of the things we do not talk enough about is the fact that tourism's benefit to Belfast and Northern Ireland is a social benefit as well. It dilutes our focus on ourselves. It brings an international dimension to what we do. It brings a level of cosmopolitanism to our city. It gives us a world view. The United Nations World Tourism Organisation is very clear about this: tourism is not just about pounds, shillings and pence. It is not just about being a beneficiary of peace; it brings peace. That is important to us. That is why tourism, in our opinion, should be clearly prioritised by the public sector, because it is not just about the economic benefit.

Q3 Chair: Thank you. The wonderful city of Derry is at the far north-west of our archipelago. I am guessing that you are going to say, Odhran, that that imperative to bring people in for the wider benefits that tourism brings applies in spade-loads in relation to tourism in the north-west.

Odhran Dunne: Yes, coming back to your point on the public-private partnership, it is an interesting dynamic. On one hand, we are working with the public sector to develop strategy. On the other hand, we are working with the commercialisation of the private sector, understanding that the bottom line is to make profit and to make money. That is our challenge: how we can ensure there is commercialisation to the industry and that there is considerable commitment to deliver additional value to the economy.

Ultimately, the global climate and the global destinations are centred on capital cities. Whether it is Belfast, Dublin or Paris, the capital cities need to generate the attractiveness of the place to get people into the destination. We can then work in conjunction with the capital city. As a second city, we are trying to work alongside Belfast, but competing more regionally and locally.

Q4 Chair: Are you competing with each other?

Odhran Dunne: On an Ireland basis, yes, probably, for domestic tourism. Once we get into market, it is a Northern Ireland sell for us.

Q5 Chair: How important is the A6 and its improvement?

Odhran Dunne: Ultimately, for us that is how you develop the regional and sub-regional economy. You ensure that there is strong connectivity internally so that visitors can move about the place. You can see that it is



two hours from Dublin to Galway. It is 150 miles, the same as from Dublin to Derry/Londonderry. Connectivity is critical to that, but it may be three and a half hours for us to do that journey. Work is ongoing now on the A6, which will support that connectivity between the city and Belfast.

Q6 Chair: Can I ask you what competitive disadvantage you think you face in Northern Ireland with respect to the cities that you have just described in the Republic?

Gerry Lennon: Chairman, before I come to that, may I go back to the point about whether Derry/Londonderry and Belfast compete? Just to be clear, it is like everything: depending on the market, depending on the sector, you may or may not. In terms of the domestic market, if you mean domestic within Northern Ireland, it is no, because 88% of the people who stay overnight in Belfast are from out of state. Given that most of the people in Northern Ireland live in the greater Belfast area, the domestic market is not a market for us. It may well be for the regions, but not for us. Our job is to bring, as Odhran said, the out-of-state market in, so we do not compete in that.

Within 1.8 million people who live in Northern Ireland, obviously Belfast will compete with Derry for shoppers and that sort of thing, but our job is not focused on that. Sorry, back to your point about the barriers.

Q7 Chair: On the competitive thing—very quickly, because I want to move on to colleagues—can you just itemise those areas that you think place Northern Ireland at a competitive disadvantage to the Republic in relation to tourism?

Gerry Lennon: To other regions, not just to the Republic, one would be that we are an island off an island off a continent. Unless we have good air access, we are at a distinct disadvantage in the key growth sectors of world tourism, which are city breaks, conferences and cruise ships, although we are doing very well. We are just at the foothills. We need far more connectivity, air access—that leads us into the conversation about APD—as well as VAT, and then investment in product, tourism infrastructure and consistent investment in marketing.

Tourism is proving the point that when it is invested in properly, there are huge economic and social benefits, but we are probably only about 50% of where we should be. We have taken 30 or 40 years to get here. Do we want to wait another 30 or 40 years or do we want to incentivise that and get up to where we can be, on the level of the Republic of Ireland and Scotland in terms of tourism's contributions to GVA? We have the same geography, topography, language and climate, so there is no reason why not. The only difference in the tourism performance between the Republic and Scotland has been a lack of investment. I know there have been huge amounts put in by the public sector in the last 10 or 20 years. They have reaped the rewards, but we have to keep the same level of commitment and investment to get to where we need to be.



Q8 Jim Shannon: Can I just say to both gentlemen: thank you for all you do? It is much appreciated. First of all, to Odhran on the programme that you have, over the last number of years I have had the opportunity and privilege of attending Irish Fest in Milwaukee. It is very much an opportunity for the councils from Donegal, Sligo, Galway and Cork, down that Wild Atlantic Way, to promote their tourism projects. At those events there has been an opportunity for other city councils to be involved. I have not seen Derry City Council or Belfast City Council at it, but I have seen other councils from the Causeway—an example would probably be Mid and East Antrim. Last year, there was nobody at all, which is a disappointment.

First of all, is that something that you, your council or the council group that you have are actively involved in, working alongside those councils for the Wild Atlantic Way? You can pull in Giant's Causeway, for instance, as one example, or The Gobbins in Mid and East Antrim, which were both promoted at those events. With no one there last year it was a disappointment, because it seemed the councils were unable financially to commit themselves to it. Is it not something that you should be doing? If we were working hand in hand with them, we might as well take advantage. There are over 120,000 people that attend that particular event. It is a golden opportunity for those Americans who might have a loose connection with Ireland.

Odhran Dunne: Thank you for the question. We have attended Milwaukee in the past. More recently, we have not been at the festival. Again, as you say, it has come back down to resources. We are limited in capacity to be able to go into market. We have to be strategic and we really want to speak to the operators, the sales, and the people who are going to convert the business more broadly than the general consumer. We have attended some of the more strategic sales missions with Tourism Ireland in America over the last few years. Ideally, that is where we will be looking at additional funding and support to ensure we are represented out there, whether it is through ourselves or through our industry.

Yes, it would be a collective approach across the wider region. I am selling right from the Belfast-Causeway Coastal Route into the walled city and on to the Wild Atlantic Way. As I mentioned before, once you go into the international market, and once you go into America, the island is such a small entity. We are a good sell in the American market, but when we go into the long-haul markets the island is very challenging to get the message out there. Even for us on a regional message, we have to go with a bigger sell on Northern Ireland.

Q9 Jim Shannon: If you can pull them to Donegal or up the west coast of Ireland, it should be an easier task to bring them across into Derry, into the Causeway, into East Antrim and so on. That is one of the things I think Tourism Ireland and the councils may not be doing to their full potential. For instance, there are the people who fly into Ireland's south. You said yourself that Ireland is a small spot for those who cross the



HOUSE OF COMMONS

Atlantic. Nonetheless, when you get them into Cork, Dublin or Shannon, or wherever the airports may be, it is only a bus journey to get them to Northern Ireland. When you get them to Northern Ireland, you want them to stay there. You do not want them to take the bus back down the same day, which many do.

What promotion has been done to encourage the United States visitors, for instance, to come across the border and stay there, rather than just visiting?

Odhran Dunne: Going back to the questions about the regionality of the tourism proposition, we have established a working group with Fáilte Ireland, Tourism Northern Ireland and Tourism Ireland around that linkage of the Wild Atlantic Way, the Causeway Coastal route and the walled city. We are working through a programme of activity, and hopefully it will tie in with the new brand experience with Northern Ireland. Really, it is about the consumer on the ground.

About 60% of our business comes via Belfast to Causeway Coast. The other 40% comes from the reverse, from the Wild Atlantic Way, usually from Galway upwards through Donegal. That is an interesting statistic and dynamic for us to be conscious of. We are a border city, so it is a unique relationship that we have in terms of the consumer. We want to ensure that journey is connected. We have a really strong tour operator base. About 25% of our market is American. It is our second biggest market outside of the domestic market. For us, it is about how we can connect in to those trade opportunities with Tourism Ireland in the states and the consumer opportunities that you have mentioned.

Q10 Jim Shannon: Gerry, I want to talk about Belfast very quickly. Of course, some of us around this table are Ulster Scots, and our historical background would indicate that. It is something that maybe we have not promoted in the past as we should have done. It is something we could do more with, Gerry.

I live in the Ards and North Down Council area. Ulster Scots is something that has been very close to me personally, but also to the previous council, Ards Council, before Ards and North Down came into play. There was a very strong promotion of the culture, the history, the language, the poetry and reading as well. There are strong connections to that, and it has not been played to its full potential, if you do not mind me saying so. Therefore, Gerry, I wonder if that is something we could be doing more within the Belfast area, which takes in the councils that are just around about it.

I am very encouraged by the way we have been able to do some of that through the cruise ships, through the council. The council has been involved with Belfast City Council in bringing some of those cruise bus trips down to the abbey in Grey Abbey, for instance, which has been a tremendous experience for a great many people. I just want to see how we can increase those numbers, and perhaps use the potential of Ulster Scots; I do not think we have done that.



HOUSE OF COMMONS

Gerry Lennon: I would not disagree with you. I have had many conversations with Tourism Ireland and Niall Gibbons, who is big fan of the Ulster Scots and that belt, and the American market.

Back to what Odhran said, it comes down to budget and priorities. We have to go for the low-hanging fruit: GB, Republic of Ireland and Europe, unfortunately. We would love to go further; we have a couple of members of staff and we do support Tourism Ireland on some of their trade shows into Canada and North America, but those types of markets are emerging markets or growing markets. China and America for us necessitate a level of investment and consistent investment, not just one year. We need to be constantly at it if we are serious about it.

That gets back into probably a wider conversation about the public sector generally saying, "We need to invest more in both the infrastructure and the marketing", because you do not want to turn the tap off on GB, Republic or Ireland and Europe, for example, in the hope that you are going to get future growth in America in three or four years' time. You want to do both at the same time. It is not a huge increase, Mr Shannon, but we need more money—I would say that, wouldn't I? That is the truth of the matter.

Q11 **Jim Shannon:** Is it not possible that you could have a partnership with the Ulster Scots agencies, for example? Could you reach out with a promotion between the two of you, and have a strategic plan?

My last point—I am conscious of what you said, Mr Chairman; you were very clear—is about encouraging more visitors from the Republic of Ireland. In my constituency, and probably in every other constituency, the figures indicate that large numbers of people come from the Republic of Ireland across the border. That is very welcome, and I am pleased to see that happening on a regular basis. What has been done to ensure that people who come across from the Republic of Ireland as visitors continue to do so for repeat visits? I am going to wax lyrical about the advantages of my constituency of Strangford. Strangford Lough is a jewel in the crown of the whole of Northern Ireland. Many other constituencies wish they had it, but they do not; we have it. We also have the opportunity of the historic St Patrick's Trail routes. Again, I am saying things that you are well aware of.

Mr Campbell: This is free advertising.

Jim Shannon: Yes, these are all things that attract people. We want to continue to have those repeat visitors coming across to enjoy all the attractions of Strangford Lough and the rest of Northern Ireland.

Gerry Lennon: As you know, we have a regional tourism partnership with Ards and North Down. We take guidance from the council on the products and services they want to promote through the welcome centre, the website and in our campaigns. We do one or two campaigns in the south, mainly around Christmas and then in the spring time. We drive



enquiries to the website, and that is where most of the regional products and services are advertised. That is how we do that.

In terms of repeat business, our focus is still on getting our message out there. For example, if you look at the cruise market, 76% of cruise passengers say they use cruises as a taster of a destination, and if they like somewhere, they will come back. Some 35% of conference delegates say that if they have had a good time they will come back. That is probably our role, in terms of making sure that people who come have a good time. Then when they have confidence in the destination, they will go further afield. That is our role in that, Mr Shannon.

Odhran Dunne: To concur with Gerry, I would say it is really about creating an emotional connection once we have attracted them to Northern Ireland. They become our brand ambassadors. The first challenge is to get people into Northern Ireland. Whether we use international events, national events, MICE business tourism or cruise passengers, once we get people here, the people sell Northern Ireland itself. Our job is done for us. We believe that creates a connection that will ensure that repeat business happens.

Jim Shannon: Thank you very much for what you do.

Q12 **Ian Paisley:** Gentlemen, welcome. It is good to see you here today. Gerry, I have had the opportunity to use your facility in Belfast and direct people there. May I publicly pay tribute to the excellent service that you provide? More importantly, may I pay tribute to your staff? They are exceptional. They are vibrant, excited and enthusiastic. People come away with a buzz after meeting them. Certainly, whatever you are feeding them, keep doing that, because it is very good. They are absolutely brilliant in terms of what they do, in particular Ann McMullan on the team. Please pass that on to them, if you can, because it does leave a very good greet for our capital city and for the other things that are on offer.

Odhran, I have not been to your offices, but I have been around the walls with some of your staff. The offering that the walls of Derry now offer is just fantastic. People need more encouragement to visit, because whenever they see it, it really is inspiring. I am sure there are other things that you guys would like to be able to direct your marketing towards. Can I ask a couple of questions? Is there a skills gap with the staff that we have in Northern Ireland? Whenever tourists come in, is there a skills gap in terms of our bars, restaurants, and hotels? If there is, how should we fill that?

Gerry Lennon: First, back to your point, Mr Paisley, which is that we often wonder why our staff are so enthusiastic. We have got to the bottom of it: everyone loves talking about their home place and where they are from. They are proud of where they live and where they went to school. We have a fantastic staff of young people—and myself,



HOUSE OF COMMONS

unfortunately, as well. We are just so proud of it. That is why they are so enthusiastic.

In terms of the skills gap, there is no doubt that the acceleration of growth is creating pressure. I do believe that the tourism industry, and particularly the hotel industry, is really catching on to that and investing in its people and investing in training. It is promoting the idea that tourism is no longer this cheap part-time place where you get a part-time job in pubs and restaurants, but it is actually a full-time career. That will need time to bed in.

I know that in Belfast, restaurants and hotels have problems with keeping staff from shifting around, but it is not within our role and remit to solve that issue. That is for Government—

Q13 Ian Paisley: But you do hear that there is something bubbling there, in terms of skills. Is it the same on your side, Odhran?

Odhran Dunne: Yes, we work very closely with Tourism Northern Ireland through their industry engagement programme and the local colleges and university to understand that skills gap, and work with the industry. We have identified that cheffing in restaurants has become a challenge, and that is really an indictment of the success of the industry. When we look at the investment that has gone into tourism, that is probably the indicator for us to measure success. Where has investment gone in? It has gone into restaurants, bars, accommodation, hotels and food and beverage facilities. There is an extra pressure on demand.

Q14 Ian Paisley: We do not have a catering college any more, which was the old way. I am wondering if there is a gap to be filled in terms of encouraging young people to think that there is an obvious career path in tourism, and that needs to be spelled out to them. At the moment I do not see that, but I know that there are opportunities, including cheffing, which you have mentioned, catering, bar staff and all the rest of it. Those are not spelled out as career paths, but the industry is very successful and growing. I wonder if there is something the Government could be doing to encourage that.

Gerry Lennon: I am old enough to remember the hotel and catering college. Belfast City Council has put in a very successful scheme working with local hotels, in terms of a training path for people. That is working very successfully, but on a national level I am not too sure.

Q15 Ian Paisley: I was on the Visit Belfast website and your reach is well beyond Belfast on many things—that obviously refers back to your customers—like Eddie Irvine’s school of motoring at Bangor, the Down Royal, the Mourne, the Ring of Gullion and Antrim castle gardens. There are many festivals, from Orangefest right the way across, as well as all the obvious big-name things like Titanic.

I noticed some gaps, and I am wondering if you do not have partnerships in these areas, or if it is something that you could be looking at. For



HOUSE OF COMMONS

example, I did not see the Ulster Museum, or the Folk and Transport museums. There are very obvious programmes and brilliant facilities. Irish league football and ice hockey are growing sports, and a lot of people travel in Northern Ireland each week to watch ice hockey. I wonder if we are making enough of sport tourism and creating that sort of link; I wonder if there is a gap.

Odhran, the North West 200 brings in about 100,000 to 120,000 visitors every year to the north-west, to principally the Coleraine, Portrush and Portstewart triangle. I have never once seen a North West 200 event sponsored by City of Derry, or sponsored by Visit Derry or the walls of Derry. It is just so obvious. It is right on your doorstep. You have 100,000 visitors, lots of them from the south of Ireland. I am just wondering why that partnership is not created. I have seen other councils eye up the North West 200 and get involved in it. Ballymena council is involved in the North West 200, as if it is theirs. I am just wondering if that is an opportunity that you guys should be taking.

Odhran Dunne: Definitely. We have a number of international events on our doorstep. We have the Derry Halloween Festival, which has international significance.

Ian Paisley: It is massive, yes.

Odhran Dunne: This weekend we had the City of Derry international jazz festival and an international choral festival. We have the Foyle Maritime Festival, which includes a clipper round-the-world yacht race. We have quite a number of international events, but Northern Ireland has quite an array of international events, and the North West 200 is one that we certainly benefit from. There will be quite a number of visitors who will stay in the city during that. Again, that is because of the demand, the pressure in the Causeway area and then the knock-on effect for pan-Northern Ireland. Those are the events that should really be encouraged and supported to grow, because they have such an impact across the wider districts.

Q16 **Ian Paisley:** The airports are part of your team, I believe. They are members of your panel.

Gerry Lennon: Yes.

Ian Paisley: Do you hear any criticism for the airports about the unfair competition that they get from Dublin airport, in terms of marketing in Northern Ireland?

Gerry Lennon: We would share the airports' view—it is Belfast International Airport, George Best Belfast City Airport and City of Derry Airport—about APD and air access. In terms of unfair competition, that probably plays into the APD issues.

Q17 **Ian Paisley:** It has been put to me that 70% of Dublin Airport's marketing budget on the island is spent in Northern Ireland, to attract



people when they arrive in Belfast—either Aldergrove or Belfast City—to go south. I am just wondering whether we should have an aggressive marketing strategy that says, whenever you get off a plane in Dublin, “Visit Derry”, “Visit Belfast”, “Visit the Causeway”, “Why aren’t you going north?” and put it right back in their face. The most obvious song that most Irish Americans sing is “Danny Boy”. It has nothing to do with the Republic of Ireland; it is all to do with Northern Ireland. Why are we not having an aggressive strategy, which says to every single Irish American that arrives in Dublin, “You are in the wrong part of the island. You need to be up north”?

Gerry Lennon: That would be one way, but possibly more effective and efficient would be, before they get on the plane, to sell them the idea that they are part of the tour. That would probably be more sustainable. When people arrive in an airport they have already got it all sorted out where they are going. Certainly, Visit Belfast advertises in Dublin as a market in itself to get people up north. We have looked at advertising in Dublin Airport as a branding exercise. As you walk through airports you see branding. It very rarely is a call to action, as opposed to how brand Titanic Belfast was in Dublin International Airport. That would be certainly an exercise, but again it comes back to budget, I suspect.

To go back to your point about the website, I am surprised about Ulster Museum.

Ian Paisley: I might have missed that.

Gerry Lennon: Kathryn Thomson is on our board and we have a strategic partnership with them. Indeed, she commended us for our efforts with Dippy—do you remember we had Dippy in the Ulster Museum? Other things you may not find on our website will be through commercial issues. We are public-private sector, and there is a fee to be paid to get on the website. People may take the decision not to be there, but generally speaking the main attractors and the main reasons for visiting here will view our website as a good take-up to communicate.

Q18 **Ian Paisley:** One of the biggest single tourism events in July is the Open. Obviously there is going to be huge legacy from that. Tourism Northern Ireland is involved in all of that. Do you fear that there might be a gap after the Open because we do not have another big headline event immediately on the agenda? Should something be done to get some big headline events equivalent to the Open?

Gerry Lennon: Certainly, looking at the power of events, I go back to the World Police and Fire Games and what it did for the city. There were 7,000 to 10,000 people for 10 days. There was the Giro and now the British Open. The power of events in terms of generating civic pride, economic development, international PR and legacy is without doubt. It is well documented, and I know that Belfast City Council are looking at a cultural strategy with a view—an event strategy that has a clear pipeline of major events. I am sure that the new national tourism strategy will be



HOUSE OF COMMONS

doing the same. Absolutely, we need a pipeline of large-scale events every year and secondary events going forward.

- Q19 **Ian Paisley:** I just do not see that on the agenda yet. You guys have been very successful collectively in terms of what you have done on that public pride thing. I am wondering if you are actually showing a lesson to the likes of Tourism Ireland on what they should be doing. Is there strategically now a step up that should be made in maybe increasing your profile and increasing your role? Strategically, is there something that would allow us to say, "Right, we need to focus tourism now on big events, sucking people in, as well as all these perennials that we already have"?

Gerry Lennon: Certainly, if you look at the last 10 years, the structure and our partnership that we have with Tourism Ireland, TNI and Visit Britain have been very successful. What I would argue would be, going forward, maintaining those partnerships and investing in those partnerships will deliver benefits. I know that Tourism Ireland are putting on a huge campaign around the Open, particularly in North America because golf is such a huge sector there. Until there is a menu of events, I suspect it will be difficult for Tourism Ireland to say how that would be. I know it has majored on "Game of Thrones". It has been massive for us.

- Q20 **Ian Paisley:** Others will ask about that. I know World Rally is up for a bid. If that could be sucked into Northern Ireland, it could be incredible. I just feel they are missing the hunger to get those things.

Gerry Lennon: I am not quite sure whose responsibility it is in terms of funding those. I suspect that Tourism Ireland's role would be to market them as opposed to actually landing them. It might in TNI's bit, anyway.

Odhran Dunne: Yes, just to come back to the Open, congratulations to everyone who was involved in securing the Open and getting it back into Northern Ireland. Its significance will be unprecedented. We are already over 80% full for the whole week, and 80% of those visitors are coming specifically for the Open, which just shows you the impact. Of course, the city is the shortest drive to the Open. It is important to remember that people can stay there, and you have great access in terms of the train and coach service to the Open.

Strategically, events are a critical part of the jigsaw and a future strategy for Northern Ireland. We need to bring events that will have organic following into Northern Ireland. If the challenge for us is getting people into Northern Ireland to experience it, we can use events; they may be national, international, sporting or cultural. That is the ethos of our development when we look at the meetings, incentives, conferences and events. That will support the seasonality of the industry and bring people here who may never have been here before. That is definitely a critical piece to develop within the new strategy.

Ian Paisley: Very best wishes to you both.



Q21 Lady Hermon: Thank you very much for coming to give us evidence today. Just following on from the comments about the Open, I have received critical correspondence in relation to our liquor licensing laws in Northern Ireland on the back of the consultation that was put out by the Department for Communities in relation to the Open, which is a major attraction to Northern Ireland. Here speaks a non-golfer, but it is a major attraction. When you were asked earlier in the evidence about the obstacles to tourism, I was struck by the fact that liquor licensing was not mentioned. Do you see it as an obstacle? Is this an opportunity to change our liquor licensing in Northern Ireland on the back of the Open?

Gerry Lennon: That is one of them. There is probably a raft of things licensing-wise. Sunday opening would be another one that we can look at and say, "If there is a whole new audience coming to Northern Ireland and they are spending £500 million a year and we are investing so much money, how do we create and extract as much value out of them as possible?" One would be liquor licensing. Sunday opening would be another. Those are two things that we certainly hear back from our partners. On a weekend, for example, they were really only selling half a weekend because on Sundays the bars and clubs close early compared to Britain and Europe, and that is where our big audience is. They do not understand it.

Yes, the short answer is that the next step of our development as a mature tourism destination would probably be to change the things that we could change that create an easier opportunity to sell to this new audience.

Q22 Lady Hermon: Both of your organisations have a huge number of businesses involved in promoting their city and Belfast and the greater region of Belfast. Are your members actively saying to you that they want changes to the liquor licensing legislation in Northern Ireland?

Gerry Lennon: Particularly on the liquor licence, we would work with Hospitality Ulster, and Colin Neill, in particular, and we would support their campaigning for those changes. In the last couple of years, we have also been involved with the Belfast Chamber of Trade and Commerce about changes to the Sunday opening retail laws. We have been very clear about those. Anything that makes it easier for the tourist and the visitor to buy products and services we would be an advocate of and supportive of.

Odhran Dunne: Coming off the back of the Year of Food & Drink in 2016, it really gave Northern Ireland a stand-out in terms of our recognition of the importance of food and drink. It is interesting that not being able to sell alcohol when a lot of craft breweries are developing—that seems to be a global trend—became an issue at trade shows. Yes, it is an issue. It is interesting that the Open might act as a catalyst for change within the legislation.

Q23 Lady Hermon: Yes, and did both of your organisations respond to the Department's consultation in relation to the Open?



HOUSE OF COMMONS

Gerry Lennon: No, we did not. I was not aware of it, to be honest with you.

Q24 **Lady Hermon:** Really? Right. That in itself is very interesting. I am better informed now to reply to the emails that I have received about it. How has the absence of a functioning Assembly—we have not had one for over two years now—impacted in respect of your organisations? Have you noticed the difference that we have not had a Minister responsible for tourism?

Odhran Dunne: Yes; obviously we have not had a tourism strategy for quite a long time.

Lady Hermon: Yes, even before.

Odhran Dunne: We have been working off a draft strategy for almost 10 years.

Lady Hermon: For almost 10 years.

Odhran Dunne: Yes.

Lady Hermon: That is astounding, given the attraction of “Game of Thrones” and the Open and everything else.

Odhran Dunne: If you do not get that commitment from Government—the tourism industry is really cross-departmental. There is such an influence across the Department for Infrastructure, the Department for Communities and so many Departments that if you do not have a defined strategy with all parties and Departments buying into it, it makes it difficult for the likes of Tourism Northern Ireland to try to implement that strategy without cross-departmental support. Over the last two years, obviously, the strategy is sitting with the Department for approval to go for consultation, so we would see it as a key strategic priority to get that out so that we can work to ambitious targets to grow the sector and get Tourism Northern Ireland and Tourism Ireland the support to deliver that.

Gerry Lennon: At the strategic level, absolutely, Lady Hermon. I said at the top there that there are four key pillars to our success as a region: political stability, huge investment in tourism infrastructure, improved access, and concerted marketing. We need the political stability back if we are to go on to the next level. That is at a strategic level.

At a practical level, from our perspective, when we have site visits and fam visits from PCOs—professional conference organisers—it is always very impressive for them to get an audience with the Minister to show how committed the region is to tourism.

Q25 **Lady Hermon:** Have you not swapped the Permanent Secretary? Do you not take visits?

Gerry Lennon: The Lord Mayor has always been there for us, which is very good.



HOUSE OF COMMONS

Lady Hermon: Exactly.

Gerry Lennon: However, sometimes a Minister would just get it across the line. Without a Government, we have performed very well, but that is something that we would like to get back.

Lady Hermon: You have. Both of you are agreed that the sooner we have an Assembly functioning, the better.

Gerry Lennon: Yes, everybody is.

Lady Hermon: The announcement that talks are going to be restarted is a bonus.

Gerry Lennon: We are very excited.

Q26 **Lady Hermon:** I am really pleased to hear that. Are you optimistic as well as very excited?

Gerry Lennon: That is well above my pay grade, Lady Hermon.

Q27 **Lady Hermon:** Can we move onto the issue that we really have to talk about in terms of tourism? How are you preparing to face Brexit both in Visit Belfast and Visit Derry in particular? Can we start with Visit Derry? How are you bracing yourself and preparing for Brexit?

Odhran Dunne: We are like every other agency and stakeholder; it is very hard to prepare for the unknown. As advocates of tourism and trying to grow the tourism economy, our priority has to be that the consumer experience and the consumer journey is as easy and as seamless as possible. The issue of a hard border would not be conducive to progressive tourism, and that would be the challenge. Hopefully, we look forward to the developments, but we will have to wait and see how that all materialises.

Gerry Lennon: From our perspective, uncertainty just is not useful in terms of marketing conferences that are two or three years out. The 2019 cruise ship season is done and there is 2020, so the sooner we get clarity as to what the regulatory environment is, the better; and, whatever it is, we can work around it. However, the truth of the matter is, from our perspective, anything that would add a layer of complications to people crossing the border, flying in here or coming in just is not a good thing. We want to make this as frictionless and as easy as possible. We have enough problems trying to catch up with other destinations without adding any layers of complication. That would be Visit Belfast's view on this.

Q28 **Lady Hermon:** Have you actually had cruise ships saying that they will not make Belfast their destination on account of Brexit?

Gerry Lennon: No. However, obviously everyone is looking around to clarify it now. We have had one or two conferences that have said because they are constituted as European conferences they do not want



HOUSE OF COMMONS

to take the risk that they would not be able to book somewhere else if they wanted to. It would be really helpful to get clarity on that soon.

Lady Hermon: So it has not affected cruise ships, but it has affected conference bookings.

Gerry Lennon: It has affected one or two.

Lady Hermon: One or two, but no more than that.

Gerry Lennon: Not a fall of a cliff, no.

Q29 **Mr Campbell:** Sorry, how many cruise ships?

Gerry Lennon: The partnership that we have with Belfast Harbour, Cruise Belfast, will have about 148 cruise ships this year with just short of 280,000 passengers.

Q30 **Mr Campbell:** 148 this year?

Gerry Lennon: Yes. It started off with two, Mr Campbell, in 1999 and now it is 148 cruise ships.

Mr Campbell: There has not been a single one of them put off.

Gerry Lennon: Not from Brexit.

Mr Campbell: Excellent.

Q31 **Lady Hermon:** So the number of cruise ships coming into Belfast has gone up every year, and continues to grow.

Gerry Lennon: Yes.

Lady Hermon: That is very good news indeed. Excellent.

Odhran Dunne: On the back of that, we actually led the way in terms of cruise development for Northern Ireland. We were the first to bring a cruise ship in through Cruise Northwest.

Ian Paisley: Just after the siege. *[Laughter.]*

Q32 **Lady Hermon:** Now, now. Do the cruise ships that call in Belfast go around and visit Derry city?

Odhran Dunne: Some will visit Lough Foyle. We have three berthing facilities: City Centre, Lisahally, Foyle Port and Greencastle. The challenge is that the industry has become much bigger than in 1995. The ships are much bigger, which means that it has been difficult for us. We operate a tender facility at Greencastle through Foyle Port, in partnership with Donegal County Council. Developing that is a major capital request. We are working with the council and Derry City & Strabane District Council to look at a feasibility study on that. This year, we will have a record number of cruise ships at 18, which is the most that we have had into Lough Foyle and which will bring in about 10,000 passengers to us.

Off the back of the larger ships coming to Belfast, the day tour options



HOUSE OF COMMONS

are extended and we get day tours coming off that to the historic walled city, so there is a pan-Northern Ireland benefit, not just a benefit to Belfast.

Q33 **Lady Hermon:** There is a lot of co-operation between your two organisations.

Gerry Lennon: Absolutely. Cruise ships are probably the best example of regionality. 94% of the passengers get off and about 45% or 50% of them are booked on tours that are not in Belfast, up to the Giant's Causeway and down to the Ards Peninsula, up to Derry and stuff like that. 35% of people who stay overnight in Belfast visit other places. 32% of all our enquiries in Belfast are about other places. That regionality is already there.

Mr Campbell, could I just go back to your question? I would need to clarify and check with the harbour—I am not aware of any issues around Brexit and cruise ships, but I will come back to you and check, just to be factually accurate.

Mr Campbell: I am sure if there had been any we would have heard it. You can be quite sure of that.

Gerry Lennon: I am also clear that they would want clarity as to what is happening as well. That is the key point that I am trying to make.

Lady Hermon: Thank you.

Q34 **Ian Paisley:** Mr Chairman, can I just correct something? I have gone back on to the website and I have found all the stuff about museums. I had skipped over it.

Lady Hermon: Including the Ulster Transport Museum.

Ian Paisley: Yes, there are actually 10 museums mentioned.

Chair: The Transport Museum is particularly impressive and it is a pleasant surprise. I remember going there. My expectations were fairly low and they were far exceeded.

Lady Hermon: I should like to think so. It is in North Down. It is a wonderful museum.

Chair: Absolutely. It is a very fine museum and I enjoyed my visit very much indeed.

Q35 **Bob Stewart:** Odhran, can I just ask you this? I have noted down what I think would be an immediate attraction around your region, which is of course emotional connection. People come for the Giant's Causeway—presumably you stretch up to there—and the coast, as well as golf, "Game of Thrones" stuff, fishing, the North West 200, whiskey at Bushmills Distillery, and the city walls. Is that the sort of package that you are selling for people to come to Derry?

Odhran Dunne: Yes, undoubtedly.



HOUSE OF COMMONS

Bob Stewart: Is there more?

Odhran Dunne: Yes.

Q36 **Bob Stewart:** Of course there is more, but is there more headline stuff?

Odhran Dunne: Yes, there are lots of attractions within the city. We have the Museum of Free Derry, the Siege Museum and the Guildhall, obviously, as well as the Tower Museum. We have fantastic tours and experiences that take you into the rural area of the Sperrins. Yes, our national catchment is the wider north-west region and, whilst we can sell a city break, for the long-haul traveller who is travelling across the island, we are perfectly geographically located to have the benefits of all of that, including screen tourism and golf tourism. Obviously, we offer the infrastructure around the nightlife, the restaurants, the bars and the accommodation that can give you that emotive experience.

Q37 **Bob Stewart:** That is great. Do you reach down to Fermanagh too?

Odhran Dunne: Once we go into the long-haul markets, as I said before, we are selling all of Northern Ireland. We are not prescriptive. Obviously, we want people to stay in and around the historic walled city but the experiences around the area within an hour or an hour-and-a-half are so wide and broad that we can offer most things for our visitors.

Q38 **Bob Stewart:** That is what people come to see. Belfast is the number one tourist destination and I presume—again, this is all headline stuff—that is all linked up: Titanic museums, transport museums and the like. I love the idea of Belfast being the number one tourist destination.

Gerry Lennon: In 2018.

Bob Stewart: That is really an amazing turnaround, to be honest.

Gerry Lennon: To be clear, it was Belfast and the Antrim Coast Road. Absolutely, what a turnaround and transformation, and it is there. Curiosity is a huge driver. In our core markets of the Republic of Ireland, Great Britain and Europe, so few people have actually been to Belfast and Northern Ireland, so we have a huge latent potential.

Q39 **Bob Stewart:** I have to say that too few people from England have been to Northern Ireland and Belfast, in my view. My final question is: do you both promote the Republic as well? We have had the Republic stealing your business. Do you promote the Republic? Obviously, looking at Derry, you are looking at going into Omagh and Galway and that sort of area.

Odhran Dunne: It is more so Donegal, because it is the border.

Bob Stewart: Donegal, yes, forgive me.

Odhran Dunne: 10% of our membership base would be Donegal. There is a natural catchment. We have talked about "Game of Thrones"; they have "Star Wars" as well. It is really about the consumer offering and what they are interested in. If you are interested in screen tourism, you have those options but you obviously now have "Derry Girls", which has



HOUSE OF COMMONS

been a great success for ourselves. That is something that would be worth touching on in terms of the strategy and how we can use screen tourism to support the seasonality of tourism. They have influence that could support the demand for accommodation and services off-season and maybe we can influence that with NI Screen and partners because those production schedules are really impressive. Once you come out and about Northern Ireland to the various screen locations, strategically, it would be great to have them off-peak and in the seasonal period. Obviously, they are constrained with production schedules and what-not, but some joined-up approach to that would support the tourism economy.

Q40 Bob Stewart: My feeling is that Visit Derry and Visit Belfast are really good organisations that have really helped, so you are successful pushers for tourism. Is that right? You would say that, wouldn't you?

Gerry Lennon: We would say that.

Bob Stewart: Having read it and looked at it, it seems like that.

Q41 Kate Hoey: Just following on from that, can you explain very briefly how you relate to Tourism Northern Ireland and Tourism Ireland? It seems to me that there is this confusion about what Tourism Northern Ireland can do and what Tourism Ireland can do. You two and your bodies seem to actually be doing the work on the ground, and I have to say that despite not having a Minister or an Executive, you seem to have done extremely well and I am not sure it would have made much difference to have had a Minister, but that is by the by. Could you just talk about your relationship with Tourism Northern Ireland and Tourism Ireland?

Gerry Lennon: Certainly. First, Visit Belfast is a partnership organisation between those councils and TNI. Without TNI's investment, we would not be able to achieve what we have been able to achieve and the 500 members. Visit Belfast's role is very clear; it is about the Belfast City region, tactical marketing operations and visitor servicing for city breaks, conferences and cruise ships in that area. Our relationship with TNI is that TNI are on the board of Visit Belfast, so we are the public-private sector partnership for the DMO—destination marketing organisation—for the capital city for the Belfast City region.

In terms of our relationship with Tourism Ireland, we use their platforms. We would not be able to have the international reach without their input, and we give them the information about Belfast and it gets an international reach. They buy platforms for us. We piggy-back and partner with them in campaigns.

Q42 Kate Hoey: Who promotes Northern Ireland internationally in, say, America?

Gerry Lennon: That would be Tourism Ireland's job.

Q43 Kate Hoey: So Tourism Ireland promotes Northern Ireland



HOUSE OF COMMONS

internationally. Tourism Northern Ireland is not allowed to promote Northern Ireland internationally; is that right?

Gerry Lennon: My understanding is that Tourism Ireland promotes the island of Ireland off the island of Ireland, and TNI promotes Northern Ireland within the island of Ireland, as well as certain products like golf. I believe Tourism Ireland and TNI are coming later at an evidence session so it is probably a better question for them.

- Q44 **Kate Hoey:** Yes, we will come on to that. I remember being told quite clearly that someone had gone to a trade exhibition about tourism and asked Tourism Ireland about visiting the Giant's Causeway, and they had immediately told them to fly to Dublin and how they could get them up from Dublin to the Giant's Causeway. It just worries me slightly that sometimes the emphasis on Tourism Ireland promotion is the Republic of Ireland with Northern Ireland added on.

This is a minor question. Gerry, you are responsible for the information office at the international airport.

Gerry Lennon: At the international airport, yes.

Kate Hoey: Would you mind trying to get that lovely map you used to have of Northern Ireland? You do not have that any more; you only have one of Belfast. People used to pick it up as they came off. It is one of those tear-off things. It is a very minor point.

Gerry Lennon: Okay, yes.

- Q45 **Kate Hoey:** The other point is this: why is there not a demand to get a really fast train link between Belfast and Londonderry/Derry? Are you pushing that? It seems to me that if you could do that in half the time it takes at the moment, we would get an awful lot of the coaches off the roads. There is no doubt about it that some parts of the north Antrim coast are being almost destroyed in the summer by tourists, big coaches and pollution.

Gerry Lennon: Both access into Northern Ireland by air, sea and rail and then access within Northern Ireland are important, and investment in that helps to spread the benefit of tourism.

- Q46 **Kate Hoey:** Is anyone pushing to get an electrified train link sped up?

Odhran Dunne: It comes back to, probably, the city deal propositions and how we can try to get the support. Obviously, we are behind the Belfast city region looking to get the endorsement of the city deal region. Within that, infrastructure is a critical piece for us to grow the regional economy, and the bus is obviously much quicker than going by train, which seems strange in Northern Ireland.

Kate Hoey: Yet it is a beautiful journey up to Londonderry on the train. It is one of the nicest journeys you can go on.



HOUSE OF COMMONS

Odhran Dunne: Yes, one of the world's great railway journeys. It is such a unique experience. It is back to the Government and the infrastructure and balancing the regional link.

Kate Hoey: I know it is not your responsibility, but I just hope that you mention it now and again.

Gerry Lennon: Absolutely. For example, even within our city region, the implementation of the Glider has really improved our ability to get tourism benefits into the east and the west that had not been there before. That, allied to the council's community-based tourism strategy, has really helped. Translink is a partner of ours, and it is fantastic in terms of providing public transport to key areas, but there has to be a market for them as well. It is a difficult one and a train, especially, needs huge capital investment from Government.

Kate Hoey: But it could pay off in the long term.

Odhran Dunne: We do have a model; we have a new north-west transport railway station opening over the next few years with a £20 million investment.

Q47 **Kate Hoey:** A few months ago that bomb went off in the centre of Londonderry. Do you find an immediate reaction or, on the whole, has any of the terrorist activity over the past couple of years made any difference to the tourism numbers and to interest in the city?

Odhran Dunne: We continue to monitor it on a case-by-case basis. Sometimes, in the immediate aftermath and in the following few days, we will see cancellations in some of the hotels, but it seems to rebound much quicker than it would have years ago. However, yes, it remains a concern in trying to send positive messages and positive PR into the international marketplace for us.

Kate Hoey: Finally, I agree with Mr Paisley on the sports tourism; it is a huge area. The Milk Cup is another example of where you get young people coming over, and then later on they play international football and remember their visit to Northern Ireland. Thank you very much.

Q48 **Mr Campbell:** The Milk Cup is in my patch, so it is very convenient to be asking some questions now. There are a couple of things I wanted to ask you. The first thing goes back to something that was said at the start about you obviously having finite resources in terms of going to various festivals and your appearance at various events, which is costly. I know it is not an either/or but, given that you have finite resources, are you able to establish and quantify what the tangible benefit is, for example, between your appearance at various events in an effort to try to drive inward tourism and the likes of, for example, "Game of Thrones" where you can see, I presume, some element of tangible numbers that are coming because of tours organised principally for "Game of Thrones"? Is there any way of quantifying which of those is more successful or do you just monitor it on a case-by-case basis?



Gerry Lennon: No, you would never want to be in an either/or situation. With each event or show that we go to, or every destination showcase that we do, we have KPIs around how many leads and the value of the conferences that would be in the room, so we are clear about that. As we are a public-private sector partnership, we have targets about bringing the trade with us, and they are always very astute; if they do not think that the clients that you are putting in front of them have potential, they will not come back. We monitor those types of things to make sure that the show that we are going to is worthwhile for them. You would hate to be in a case where you take money or time out of attending trade shows in the marketplace for building or creating attractors here. You need to do both. You cannot sell Belfast from sitting in Belfast. You have to be in the marketplace, and that is where we need additional resource to make sure that we are in all of these market opportunities in America and China and all of these developing countries that it is currently difficult for us to prioritise because of the budgets that we have.

Mr Campbell: My other question covers the north-west, so if you are broadly on the same page I would prefer to go on to my next question. Is that fair enough?

Odhran Dunne: Yes, fair enough.

Q49 **Mr Campbell:** Looking at the connectivity in four areas—A6, A5, the airports and APD, and the ports in the north-west in terms of cruise ships, which I am delighted to hear are so successful all over—what preparedness is there? For example, it seems to me that in three of those areas we are making significant progress; the A6, the A5 and the port have very exciting developments. We have not made as much progress on the airports and APD yet, but hopefully we will. It seems to me, looking at those four significant developments, that they could potentially completely and utterly transform tourism. I cannot think of anything in the last 30 years that has provided as much potential for transformation as a combination of those four things. I am just wondering what preparedness there is for what should be a massive influx due to those four beneficial developments.

Odhran Dunne: I suppose that that is the confidence that is given back into the private sector to get that investment on the leverage that, once you put in, will enable infrastructure to attract more people into the destination. You see that growth coming around in terms of the accommodation base. We have seen a 25% growth in our accommodation base over the last three years, and that is indicative of how successful the industry has become, and that is a great marker for us to understand that we need more capacity. Obviously, Belfast has grown fantastically as well over the last number of years, and it is relative for us maybe at a lower level, but, yes, I completely concur with your summation that putting in place the enabling infrastructure will give us opportunities. It has become a challenge, when you mention the infrastructure, to some of the buyers in terms of the time constraints and getting to destinations, particularly around business tourism and flying



into destinations. However, once we have that stronger connectivity, it certainly will open the doors to new business for us.

Q50 Mr Campbell: I have one last question related to cultural tourism. You have mentioned some of the attractions in the north-west and Belfast area. I am thinking particularly of the Maiden City Festival and the Siege Museum in Londonderry. As a Londonderry boy, "Derry Girls" has undoubtedly attracted people. I am trying to see if there are any tangible benefits. We all say that it is great and that it is good to see and there is evidence of people coming as a result of awareness of changes that are happening in Northern Ireland, but how do you monitor that? How do you flag that up and say, "There is something that is working for us because we know this"? For example, you said how many cruise ships there were. You cannot identify as easily why they are coming, because people cruise for various reasons, but if you can definitively point to a rationale and developments, surely you then keep doing what works and you maximise it. Have you been able to do that in the cultural tourism trade?

Odhran Dunne: I suppose that is where the challenge is. I would probably look at the example of the city walls. For us, it is a complex arrangement. There is a city walls management group that has cross-sectoral involvement, from the Department of Justice, Department for Infrastructure and Department for Communities as well as Tourism NI. There are quite a number of players in that arrangement. What we would like to see is the walls brought to life as an experience. It is done at different times of the year.

Mr Campbell: Maybe cleaned up a little bit as well.

Odhran Dunne: We rarely have any complaints about the cleanliness of the city and the walls; it is probably the vegetation that people would comment on. Yes, there is quite a role in preservation where, for us, that is sitting with promotion. Whose role is it to promote the city walls? It is an iconic attraction in Northern Ireland, but whose remit is that? Is that left to Visit Derry as the national agency? In other destinations, you would have specific resources and management and marketing resources going to promote such an iconic attraction. We would like to see the city walls brought to life through a curatorial animation programme that becomes a living, breathing experience for visitors rather than an inert object that comes to life with events at different times of the year.

We have launched a new cultural strategy and all the facets of that will hopefully, with the support of central government, local government and the private sector, drive tourism to the city walls.

Gerry Lennon: If I understood the question correctly, Mr Campbell, there is a direct correlation between the level of investment in tourism infrastructure and then the output. Titanic Belfast is a classic example. It has totally transformed the climate for us. You can see the growth from 2012 up to now. It was a catalyst, not by itself but with all the other things that happened. There is the extension to the waterfront now with



the International Conference Centre. I am just looking at the numbers of the last five years. We have secured £230 million of conference business because we have had the enabling infrastructure, as you say, and the capacity to do it. Our hope and prayer is that the Belfast City region deal, with the tourism attractions there, gets the support, because we have hopefully proven the point that when you invest and build, people will come. That is where we need to go, because we are literally only at the foothills. We can double again what we have achieved in the last 10 years. In fact, we should do so, because that will get us to where we should have been 30 or 40 years ago.

- Q51 **Sir Desmond Swayne:** Holidays in hell are a niche but growing market. The Ukraine is making quite a trade out of Chernobyl tourism. The Czechs and the Hungarians make quite a tourist attraction of the grislier aspects of their Soviet past. What is the size of Troubles tourism in Northern Ireland and to what extent does the existence and promotion of that actually compromise other marketing strategies in a less helpful way?

Gerry Lennon: Troubles tourism or dark tourism we prefer to call "contemporary history", and that is exactly what it is. You cannot escape it. It is there. It happened. People are curious about it. We find in Belfast that 17% of all the tours we sell out of Belfast Welcome Centre are related to the political tourism. We find that a lot of people will do that for an hour and a half but that is all they will do, and then they get on with the rest of the tours and things.

The community-based tourism strategy that Belfast City Council are putting out is a fantastic initiative because those areas in East and West Belfast need to see the benefits of tourism. The Belfast Agenda is very clear that everyone has to benefit from this. There is no point in just having honeypots. However, it is sensitive and there is no doubt about that. The real issue is that the pace of the development of that should be dictated to by the communities within which it happens, and that is the real issue and that is the way that Fáilte Feirste Thiar and EastSide Arts are doing it, and they are examples of how it should be managed. I do not know if that answers your question.

- Q52 **Sir Desmond Swayne:** Is there a quantifiable "Game of Thrones" effect and is there a strategy for continuing that, notwithstanding the ending of the series, and taking that into the future and exploiting it and growing it?

Odhran Dunne: Yes, there are a number of projects on the go. TNI are involved with a number of them, like Banbridge. There are a number of projects at various stages. Is it quantifiable? I am sure that somebody has done a piece of work showing that it has been absolutely huge for us, particularly in North America and China. We were at a destination showcase in Shenyang—Belfast is linked with Shenyang—and we did a "Game of Thrones" theme, and the response from the audience was just phenomenal. "Titanic" and "Game of Thrones" in China are two massive hooks for us, and we should have the confidence to go with those. I do



not have a figure about what “Game of Thrones” has brought to Belfast and Northern Ireland but I am sure one exists within TNI and Tourism Ireland, and I know that Tourism Ireland have majored in North America on “Game of Thrones” being shot in Northern Ireland. It is a phenomenal opportunity for us in terms of legacy projects going forward.

Q53 Maria Caulfield: I just want to look at the issue of returning tourists. You said that when you did your survey, you found that 35% of people who visited said they would like to come back or they would be keen to come back. What work is being done to ensure that they do come back?

Gerry Lennon: What we are doing now, after GDPR, is to start to build up our databases again and collate this information through the Welcome Centre. The surveys that we have done in the Welcome Centre show that for those who have a positive time, we need to sell them again to go further into Northern Ireland. We are in the process of that at the moment. Again, it is about resource.

Q54 Maria Caulfield: What efforts are being done while they are there to say, “If you come back again, this is something else you can see?” My family are from southern Ireland and we went over to Antrim and did the Giant’s Causeway over Christmas. I did not realise that there was the rope bridge— which I want my certificate for, so I am desperate to go back and do it—and the castle there as well. Even for someone like me who goes to southern Ireland quite a lot, I did not realise those things were there, apart from the Giant’s Causeway. Yet I have had no information trying to get me back or telling me when I was there, “You have come this far today, but next time try X, Y and Z.”

Gerry Lennon: Our focus in Visit Belfast currently is this: we have done research that showed that something like 75% of people said that once they had engaged with a member of staff, they had gone somewhere they had not thought they would and spent money that they had not planned to spend. The individual engagement—secondary sell—is very tangible and is very important for us. That is important, because there was a thought that we did not need tourist information centres or personal engagement because everything was going to be done on the phone.

Ian Paisley: Maria spent all her money in Bushmills Distillery.

Gerry Lennon: Our staff are very clear and clued up, when they are engaging with people and are being asked about certain attractions, to make suggestions about other places. That is in terms of extending the stay or extending the spend as opposed to repeat business, which would involve collating your information, understanding what you have done and what you have not done, and that is the whole process we are starting to get involved in now.

Q55 Maria Caulfield: We have talked a lot about sporting events and festivals and how great they are for bringing people in across Northern Ireland, but what about targeting specific speciality groups that will not



necessarily come for the Open but like to play golf for themselves? I am thinking about the fishing industry. There are a lot of fishermen in the rest of the UK who go to southern Ireland because it has great lakes and open waters and small B&Bs, and they can bring their van over with their fishing gear and stay there for a couple of weeks. They are repeat tourists, but they are not your traditional tourists. What work is being done? I know from the fishing industry that they will go to southern Ireland but they would not think of going to Northern Ireland.

Gerry Lennon: Again, it is slightly outside our own remit. I know that Fermanagh would specialise particularly in the fishing area. In terms of sports tourism, we have identified this a couple of years ago where sports tourism morphed into special interest tourism or special interest groups as opposed to just sports. We employed somebody for a year last year and engaged with the sports council and identified the number of sporting associations in Northern Ireland that actually send teams over to England or down south, such as under-16 or under-18 hockey or whatever it may be—and we are now in the process of trying to reverse that and suggest to them that we have fantastic sports facilities. We have a pipeline of sporting events that are not on the scale of the British Open but smaller, whether it be under-16 badminton, hockey or whatever it is. We have a small pipeline of those types of events and indeed sports conferences. We have the pipeline now. We are trying to get local ambassadors. 70% of every event or conference will come to a destination because they have been invited by a local ambassador, so we are trying to match that event up with somebody in Northern Ireland who has influence over that association, and we will hopefully see that come to fruition over the next couple of years.

Odhran Dunne: Can I just come back to fishing? The statutory agency that we would particularly work with is the Loughs Agency. We see it as quite a niche area, and they would attend most of the angling fairs throughout Ireland and into Great Britain to raise awareness of the angling opportunities within Ireland and Northern Ireland.

Q56 **Maria Caulfield:** Can I just ask specifically about the beauty industry? Spa resorts and spa breaks are really taking off. How big is that as a tourist part of Northern Ireland?

Odhran Dunne: It will be on that list of trends that we will be looking at. If you are asking me what we are seeing come out of the global trends, health tourism and eco-friendly tourism are certainly things that we see will continue to develop. We have also seen the success of Galgorm and its offering. From my perspective, I would love the city to have a spa offering. If somebody is looking to build a hotel, how do you differentiate yourself? Are you just building a hotel or are you going to give me an additional product or something that will differentiate for the city or the region? Along with global phenomena such as digitisation, VR, augmented reality and incorporating business and leisure trips, it is something that we will probably see more of over the next five to 10 years.



Q57 Maria Caulfield: Where do you think that market will come from? Would they be tourists from within Northern Ireland visiting different counties, from southern Ireland or from the rest of the UK? Where would you see that market?

Odhran Dunne: We understand that it will be hard to grow the domestic audience. What you will be looking at would be the Republic of Ireland market and the GB market to get the biggest market. Globally, it will be a trend, so you can imagine them coming from most of the North American and the Asian markets as well.

Q58 Lady Hermon: You have mentioned and we have asked you, quite rightly, about the very successful "Derry Girls" and the very successful "Game of Thrones" so I feel I have to ask Gerry about the impact that you are expecting from "Line of Duty", which has also been extremely popular and very successful with brilliant acting and filmed in Belfast. Do you already see an impact already as a consequence of its success?

Gerry Lennon: All of those together rather than individually—"Game of Thrones", "Line of Duty", "The Fall" and all of those things—and the whole screen tourism business has been phenomenal for us.

Q59 Lady Hermon: When you say "phenomenal", can you quantify that?

Gerry Lennon: No, but I know NI Screen can. I do not have the figures, but they can be very clear in terms of extras and in terms of the economic impact of each individual show.

Mr Campbell: They did not come up the Lagan in a bubble either.

Gerry Lennon: Absolutely, they did not. It is just another part of the balanced portfolio that Belfast and Northern Ireland has to offer in terms of screen tourism, business meetings, incentives, cruises, short breaks and tours. It just adds to the success. Just to be clear, Lady Hermon, the numbers that I have been quoting are outwith those; that is, in addition to. The success, in terms of the transformation to Belfast and Northern Ireland, is even higher than the £500 million that we have been talking about.

Lady Hermon: Yes, it has obviously had a very positive impact.

Gerry Lennon: Yes, without doubt.

Odhran Dunne: Talking specifically about "Derry Girls", because Netflix has picked that up, it has given us an international platform. It has only had one series of it on the platform, so that will materialise. "Game of Thrones" took a few series to develop before its impact was realised. We are doing pretty well considering we have only had the two series so far—the third is confirmed—but it is certainly another motivator for people to come to Northern Ireland.

Q60 Kate Hoey: Northern Ireland is a very small country and, as you have said and we all agree, it is the people of Northern Ireland that make



people, having visited it, want to come back because they are absolutely struck by the friendliness that we all know. However, does it worry you sometimes that there is a limit to what we can develop and do without changing the nature of some of the beautiful places in Northern Ireland? Obviously, we would like to get APD off. We would like to get all the advantages that we should have in Northern Ireland, but do you think it is very important that somebody somewhere is sitting and thinking, "Actually, let's get the balance right"?

Gerry Lennon: Absolutely. The trend in DMOs—destination marketing organisations—is now moving to DMMOs, which is destination, marketing and management organisations, to manage the destination. I am just talking from an urban perspective, whereas I know you are probably talking about the Giant's Causeway and the Dark Hedges, but it is the same principle. The key thing is to make sure that the local communities are coming along, understanding and are happy with the level. The minute they are not, we need to balance it. In the past, it was all about growth, not about the value and the real benefit. We are not at that stage, but in Belfast the capacity is still there. I am under pressure with a thousand additional rooms. The occupancy rates have actually fallen. We are nowhere near full capacity in Belfast.

The issues around the Giant's Causeway and so forth can be solved by the other parts of Northern Ireland being dialled up in the marketing so that there is awareness of them. As Mr Shannon said, the Ards Peninsula and North Down is beautiful, and the Mountains of Mourne are beautiful. We do not have to turn off the tourism tap; we can redirect it and rebalance it. Our role at Visit Belfast is to start to do that, because the vast majority of people will be staying in Belfast and it is about redirecting people. That is why we want to reach out to the other local authorities to come and engage with us. We are dealing with 1 million enquiries a year. "Come and get a piece of that business" is basically our message.

Q61 **Kate Hoey:** Is there a Visit Enniskillen?

Odhran Dunne: Fermanagh Lakelands.

Kate Hoey: It is similar to your organisations.

Odhran Dunne: It is their marketing organisation. We are marketing and visitor service.

Kate Hoey: Thank you.

Q62 **Ian Paisley:** I welcome what you said about the hotels on the coast. I understand there has just been an approval in Derrykeighan for a new hotel. If you do not know where Derrykeighan is, it is right beside Lisnagunogue. It is unfortunate that some hotels have faced judicial reviews. There was a big one in court, which is unfortunate, because that impacts on business conferences as well. Gerry, I picked up something that you said something in a comment to Maria: you said you were



rebuilding your database after GDPR. Did you lose your database under GDPR?

Gerry Lennon: We had to go through it. We had to make sure that we had collated it properly and gone through it all.

Ian Paisley: So it is a rebuilding exercise now.

Gerry Lennon: Yes.

Q63 **Ian Paisley:** Has that been a problem?

Gerry Lennon: No, it is just a process—time. That is it. It is a useful exercise.

Ian Paisley: Thank you.

Chair: Gentlemen, thank you ever so much. Your optimism has infected us and we will approach the rest of our inquiry in that light. Clearly, there are issues facing tourism in Northern Ireland, and some are matters that are for Ministers to make decisions on. We hope very much that the Executive will be restored fairly soon so that it can get on and make some of those decisions, particularly in areas that reduce the competitive advantage of Northern Ireland. Thank you for what you have said today. It has been extremely helpful, and it will definitely help to inform our report when we write it.