

Northern Ireland Affairs Committee

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

Wednesday 22 May 2019

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

Questions 64 - 121

Witnesses

I: Janice Gault, Chief Executive, Hotel Federation Northern Ireland; Eimear Flanagan, Steering Group Member, Tour Guides Northern Ireland; Colin Neill, Chief Executive, Hospitality Ulster; Dr Joanne Stuart OBE, CEO, Northern Ireland Tourism Alliance.

Written evidence from witnesses:

- [Hotel Federation Northern Ireland](#)
- [Tour Guides Northern Ireland](#)
- [Hospitality Ulster](#)
- [Northern Ireland Tourism Alliance](#)

Examination of Witnesses

Witnesses: Janice Gault, Eimear Flanagan, Colin Neill and Dr Joanne Stuart OBE.

Q64 Chair: Welcome to the Committee. It is very good of you all to be here and so early in the morning. As you know, we are doing this investigation into tourism to see how it is working, what is happening and some of the difficulties and issues. We are looking to you to help us in that. It would be really good if each of you could say a few words at the beginning to introduce yourself and your organisation.

Janice Gault: My name is Janice Gault. I am the chief executive of the Northern Ireland Hotel Federation. We look after a large chunk of the accommodation sector, primarily hotels, but also guest accommodation and guesthouses. We have spent quite a lot of time looking at the industry and looking at the wider sector. At this moment in time, hotels have undergone a major expansion.

Colin Neill: Good morning. I am Colin Neill, chief executive of Hospitality Ulster. The clue is in the name. We represent the hospitality sector across Northern Ireland, predominantly on the food and beverage side. There are huge challenges facing the industry to realise the full potential of tourism, so I really welcome this inquiry.

Eimear Flanagan: I am Eimear Flanagan, representing Tour Guides NI, which is a three-year-old organisation looking after freelance tour guides operating in Northern Ireland tourism. We are a 100-member body operated as a team of volunteers and we are delighted to be here. We are delighted to be at this stage of tourism.

Dr Stuart: Good morning. I am Joanne Stuart. I am CEO of the Northern Ireland Tourism Alliance. The industry came together and wanted a single voice for the whole of the tourism industry. We have a number of members, including my colleagues here today, supporting the organisation. It is very much about how we can raise awareness of the importance of tourism to the economy in Northern Ireland and to the development across the whole region. I came into the job in the middle of March, so I am just getting up to speed with everything. Again, I am delighted to be here.

Q65 Lady Hermon: Thank you very much indeed for agreeing to come and give us evidence here today. I know, Joanne, you are new into the job, but I would like you to identify, if you would, each of you or collectively, what you see as the main issues for the tourism sector that have arisen since the collapse of the Executive in 2017. What are the main problems that really need to be dealt with as a matter of priority?

Dr Stuart: Coming into the industry, it has been a very interesting time for me to really understand the complexity of the tourism industry and the important role it has within the economy and Northern Ireland. It is not recognised as much outside the tourism industry itself that tourism



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has an impact on a number of different sectors across the region, that it is an export-led industry and that money coming into tourism is coming in from outside Northern Ireland.

Looking at what some of the challenges are, we do not have a strategy for tourism across the piece. We do not have anybody who is really focused on tourism from a political perspective, and we have seen that in the fact that we do not have a strategy. We are seeing reducing budgets. We still have outdated legislation, particularly for liquor licensing.

There is real ambition within the industry, but it has to be about how we make sure we are very competitive. There are issues still around VAT and air passenger duty, but skills are a big thing, particularly with the UK leaving Europe. We rely on a lot of people coming in from outside Northern Ireland to work in the sector. There are issues with immigration policy, and it is really important that travel across the island of Ireland continues to be seamless. Those are some of the things.

For me, as well, there needs to be a more joined-up approach across government. Tourism is the responsibility of the Department for the Economy, but there are lots of things happening that impact on tourism, whether that is infrastructure or heritage and planning, et cetera, in the Department for Communities. There needs to be a much more joined-up approach with regard to the impact of decisions on tourism. Those are some of the things that we would be looking at.

Lady Hermon: Is there anything you would like to add?

Eimear Flanagan: From our point of view, we are at peak growth. Belfast has 20 years of continuous tourism growth. It has been a long struggle to have what Tour Guides now has in place, which is a career pathway for every level of guide and accreditation. That still lacks endorsement at Government level, so we operate in the abyss of a lack of direction. My great fear, if that continues, is that the outcome will be tourism growth beginning to stall and slow down, in the lack of a clear, accountable strategic body where we are all on the one page. There is some stuff we are doing amazingly. We as guides spend more time with the tourists than anybody else in the sector, and we have a rich resource to feed back into the stuff we do brilliantly. A lot of the stuff that we do is world class.

Q66 **Lady Hermon:** Do you work with the Department for the Economy in any capacity? Do you liaise with it? Is there a contact within the Department?

Eimear Flanagan: We work primarily with TNI, in terms of an endorsement and seeing guiding as a profession for all levels. There is this perception that you need to be able to guide around all of Ireland. There are probably about 500 guides working in tourism on the last look. The vast majority of that would be in attractions, places like the Giant's Causeway and the big tour businesses. We represent the for-hire



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guides—so, the big tour operators that are coming in. We also have a number of members, which is a very recent development in the last five to six years, who have niche tourism businesses that are responding to global trends of experiential stuff. I personally run a hiking tour business. There are five or six that have come into existence since 2013 all around the Causeway coast with “Games of Thrones” stuff and food stuff.

Lady Hermon: I have to mention County Down, from a personal perspective of North Down.

Eimear Flanagan: That is the thing. Belfast and the Causeway have it sewn up, but Fermanagh remains Ireland’s best kept secret and that cannot change without change at this level.

Lady Hermon: And County Down.

Eimear Flanagan: County Down, the moors and the glens, should be as strong as Belfast and the Causeway, but they are not. There are almost three layers. Derry has come on, but Derry is very new. Belfast has 20 years and is in an extraordinary position compared to where we were, but it has not spread and it needs to, because what we have is absolutely world class. Bangor should not be struggling to get the tourism industry, given how close it is to central Belfast.

Lady Hermon: Thank you. You will have to come to Bangor.

Colin Neill: Lady Hermon, as we know, we have had no Northern Ireland Executive for two and half years, heading towards three, and tourism has been growing quite strongly, indeed really strongly. I would not say there is a direct correlation there now between having no Government and tourism growth. I would give credit to John McGrillen of Tourism Northern Ireland. He was appointed three or three and a half years ago and I have seen a real drive there.

That said, we are still seen primarily as a twilight industry: nice, but not important. People do not realise that we are an export business. If Michael Deane cooks a meal in his restaurant and posts it to France, it is an export. If we bring the French here to eat it, it is an export. It is the same foreign direct investment and that is key to changing the mind of Government.

There is no Assembly. We need an Assembly back. We need an Assembly that will commit to tourism as a key economic driver. They need then to create the right environment, and that is taxation, legislation and the regulatory environment to allow us to cater, because a lot of our regulation holds us back. The key is for them to put their money where their mouth is. We have to invest in tourism. When you look at tourism in Northern Ireland, most of their funding comes from in-year funding rounds and stuff. You cannot plan if you are told, “There is some money for three months and there is some money for three months.” They need a proper budget.



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I would argue too that the organisation probably needs to be allowed to restructure, because form follows function. It was created in its shape years ago, but with all the job losses and stuff, and the reduction in the civil service, that limits its ability to be fit for today's purpose. My ideal thing is to give us a Government and let us get down to business.

Janice Gault: From our point of view, the real difference in the Assembly is the enablement piece. There is a lot of work being done. The biggest single factor that we have is skills. People and skills is the biggest single issue. In order to change that, we need changes to be made in the education curriculum from primary school up, changes made in secondary and the image of the industry changed. A lot of work was done on it prior to the collapse of the Assembly, but none of it has really been progressed.

On enablement, it is very easy to hide behind saying, "We have no Minister, so if we have no Minister we cannot do anything." That means, if something comes up that is even vaguely contentious, it simply does not happen. Hotels by the end of this year will probably have invested in the region of £600 million. We recognise that we just have to get on with it. It is really that simple. Having Stormont makes things a lot easier, but in the interim period you just have to continue to trade.

Q67 **Lady Hermon:** Yes, it has not stopped hotels opening across Northern Ireland. It has been mentioned, so can I come to the proposed changes to the liquor licensing laws? It has been mentioned that they would need to be updated. Colin, I am going to come to you, because you have been very vociferous in your criticism of the proposals for the change for special events and I am going to quote to you.

Colin Neill: Feel free.

Lady Hermon: You said, "Hospitality Ulster has long campaigned for changes to Northern Ireland's licensing laws". This is on 16 April in the piece you wrote for the *Irish News*. These are your words: "The recent short-sighted Department for Communities consultation to allow it the power to designate a limited number of events taking place in Northern Ireland as a 'special event' is so disappointing". You have described it as disappointing. You have said, "Civil servants should not be bending over backwards to rush through legislation for the Open, whilst ignoring the businesses that are the backbone of our tourism industry".

Colin Neill: I stand by those words.

Lady Hermon: You stand by that.

Colin Neill: I do indeed, Lady Hermon.

Q68 **Lady Hermon:** It is very harsh criticism.

Colin Neill: If you look at it, we are very supportive of the Open. We see its value. It is worth £80 million. I have an industry that is worth £1.2



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billion a year and we cannot get any legislation moved at all. We have spent years working on it. In fairness, there was a Bill going through the Assembly when it fell, but it is possible to pull something out of the air because there is a one-off event, while my members struggle to pay their increased rates, struggle to pay their increased wage costs. There are more and more cost pressures, but we are not allowed to do anything to increase our income. We cannot sell more alcohol to the same people. We need to create an environment where we have more people coming in and we need the structure to do that.

I have the greatest respect for our civil service. I know they had the best of intentions, but you really cannot turn round to an industry that is worth £1.2 billion and say, "You go to the back of the queue. We are just going to sort this bit out."

Q69 **Lady Hermon:** You remain very critical of the Department and the proposals.

Colin Neill: Yes. It is frustration from our membership. We would love to come to a position with the Department where we could even sequence legislation. I have members who are really struggling to survive. They look at that and go, "Why can we not get ours done?"

Q70 **Lady Hermon:** How big is your membership?

Colin Neill: It is over 1,000.

Q71 **Lady Hermon:** Is this issue of changes to liquor licensing raised in the hotel group with you, Janice?

Janice Gault: We have had two main issues with it. The main issue for us has really been the inability to stage formals. There was a case about three or four years ago now, where there was an agreement that you could have people between the age of 16 and 18 at a formal.

Lady Hermon: These are school formals.

Janice Gault: School formals, yes. They were allowed to be there and drink was not sold. There was a generally accepted code of practice. A case was taken and a judicial review was done on it, and now it is completely against the law after 9.30, which really means that most weddings are breaking the law, because there are children at weddings after 9.30. All that has happened is that the formals are being staged in hotels at 5.30, and then people are leaving the hotel at 9.30 and going to other premises.

There is also the general perception around bigger events, and I suppose our major objection is that somebody is going to decide what a special event is without any framework. There is no framework noted in the consultation. We had the BBC "Good Food Show". We have had a number of food and drink shows where the dispensing of alcohol has been banned and off sales of alcohol have been banned. It is not allowed to happen



due to licensing. From our understanding, we are unsure whether those would sit in the special event category. There was no framework given. Is it just going to be golfing events? Is it going to be sporting events? Nobody has any idea.

From that point of view, the consultation is a bit strange, coupled with the fact that we have been told nothing can be changed because we do not have a Minister. It is quite strange that all of a sudden a piece of legislation appears to be able to be changed. We went specifically about the formals and were told, no, nothing could be changed. It is not the fact that the idea is to facilitate the Open. It is the process: "This can be changed now". It is just all a bit strange.

Q72 Lady Hermon: It would be very odd if we changed the legislation on liquor licensing and found ourselves unable to change the legislation to give compensation to victims of historical institutional abuse. Joanne, have you anything to add?

Dr Stuart: As the Northern Ireland Tourism Alliance, we are supporting Hospitality Ulster on the modernisation of the liquor licensing. We would see, with a consultation around special events, an opportunity to address all the issues we have with the liquor licensing. It is just an example. We have a growing number of craft drink producers now, whether it is cider, gin or whiskey. I am talking to one cider company, which is a small company. They have a tour where they show how the cider is made and then at the end there is a shop. They sell local produce and crafts, and are not able to sell bottles of their own cider that is produced on the premises. It is things like that. At the end of the day, we were very much about how we grow tourism, and this is one of the aspects with regard to getting the environment right, so that we can create those extended experiences for visitors who are coming in.

Lady Hermon: Eimear, do you want to add anything?

Eimear Flanagan: The biggest aspect for the visiting tourist is the lack of night-time economy for tourism across Northern Ireland and how that is related to our out-of-date licensing laws.

Q73 Chair: Colin, on the licensing issue, what exactly is it you are looking for? Is there not a worry that you are almost saying that tourism is dependent on more and more people drinking more and more alcohol for longer and longer hours?

Colin Neill: Absolutely not. As I said, this is not about selling more alcohol to the same people. It is a wider audience. The legislation we have is very restrictive. It hinders our evening economy. The Barclays Bank report of two years ago put the loss from restricted practices—not all hours, I will say—in the evening economy in Northern Ireland at £200 million. We will be a significant part of that.

It is really about us being able to provide the experience the customer wants. People now dine out later. Then they want to go on and have a



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social drink, but our legislation is such that the latest anybody can sell is at 1 am. We have asked for very moderate alterations, such as to allow that to go to 2 am. We do not want deregulation at all. We absolutely respect that it is a controlled substance. That is why it is sold under licence, but the best place to sell alcohol is in a controlled environment rather than off sales.

If you look at the alcohol consumption figures in Northern Ireland, 6% of the population drink 44% of the alcohol. That is not in a pub or a restaurant. To drink that volume, you are buying litre bottles of vodka. That is not our market. We sell about 23% of all the alcohol in the Province right across our sector. Ours is experiential. Ours is using quality local craft brands, but we need the environment to retain the customers, let them have the experience, build that market and, indeed, then be able to grow our industry to service the tourism economy.

Q74 Ian Paisley: I was reading through the statistics that you produced in your summaries. Essentially, tourism and hospitality, for a number of reasons, are not performing to their full potential. There is a huge hope and there is a huge opportunity there, but they are not performing. You have identified some very good pointers as to why that is.

From what you said earlier in answers to Lady Hermon, do you think Northern Ireland, if it does get an Executive up and running, needs a Minister and a Department for tourism and hospitality? Is it so important, because it could create that much growth, employment and skills development, as you mentioned, Janice, that it deserves a Minister with that specific responsibility?

Colin Neill: Is that in particular to anyone?

Chair: You do not have to all answer every question.

Colin Neill: In my view, and the industry's view, yes. It is as simple as that. Tourism is spread across numerous Departments, and unless someone is co-ordinating that approach it ends up in siloes. It was a Northern Ireland Minister, whose name I will not quote, who said the biggest problem with us is that we are everybody's friend and nobody's family, in that we are all shared in different bits.

Q75 Ian Paisley: Someone with sole responsibility, with a strategy and with key measurements in terms of driving it would help the industry going forward.

Dr Stuart: Absolutely. It is critical, because tourism is supporting so many other industries. If you take the screen tourism, the golf tourism et cetera, tourism builds on the success of those industries and helps to create more out of them. With regard to decisions on road infrastructure, public transport, et cetera, all of those have to take into account the growth in tourism. At the moment that is disjointed.



Having somebody who is really focused on tourism would make a real difference, but there are issues we need to address, like sustainability and the management of our tourism assets, particularly within that heritage and culture side. There are so many different aspects that have to come into it. At the end of the day, we are all in the tourism industry in Northern Ireland. It is about people. It is one of those industries that truly can deliver across the whole of Northern Ireland.

- Q76 Ian Paisley:** Some years ago, the Northern Ireland tourism board produced work in progress issues at a UK level that will impact on Northern Ireland tourism and none of the work in progress has been achieved. There has been talk about progress, but when you do a tick box on them, no, nothing has been achieved on the work in progress. That goes back to the fact that there is not someone there who is ultimately responsible for it.

You mentioned, Joanne, the issue of events and you mentioned the golf events as a driver. Another point is that we need things to drive the economy and bring people into Northern Ireland. We are all looking forward to the Open. It is going to be a major success for Northern Ireland, but post the Open do you see anything on the horizon or any strategy of that scale that is going to bring people to Northern Ireland?

Dr Stuart: As I said, we do not have a strategy. I know that is something that Tourism NI is trying to push forward with the Department. One thing that is coming up is Taste of Ireland, which is building on the success of the food and drink industry within Northern Ireland. There is a drive to start to really develop that, particularly out of season, because, again, that is a big thing for tourism: how do you have tourism all year? I suppose in Northern Ireland we have an advantage, in that people are not just coming for the weather. They are coming for so much more. There is more to be done with festivals and really creating the awareness of those festivals. Halloween is a growing festival, particularly within Derry.

- Q77 Ian Paisley:** There are the perennials that come up. Some of our local-grown ones are absolutely fantastic. Just last weekend in the north-west we had an utterly superb Balmoral Show with superb events. In terms of the biggies, like bringing the Open in—and then a few years later it will come back—there does not appear to be anything on the horizon coming from Northern Ireland where we are reaching out to get that.

Janice Gault: There is a golf strategy that goes to 2020, which is currently being reviewed. The real challenge of the Open is building the legacy. In reality, golf this summer in Northern Ireland will be different to the way it normally is, because people will not be able to play Royal Portrush, so there is a real opportunity to be built for next year. There is already some collateral produced out there, which is on the international level, but there is a review currently of the golf strategy to look at how it can be built. There was previously a look at a series of other international



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events to build on that. For example, in golf you would look at the Ryder Cup and other things, and when the Open will return to Northern Ireland.

Q78 **Ian Paisley:** Beyond golf, do you see anything on the horizon?

Janice Gault: There are no significant events that we are aware of at this moment in time.

Q79 **Ian Paisley:** There is the thing that worries me, that we have this big event this year and then there is a cliff edge. There is nothing beyond that, and yet there are indications out there from people who are crying out to do stuff. Last week, the head of the FIA, the International Automobile Federation, said he would like to move World Rally from Wales up to Northern Ireland. The equivalent to Bernie Ecclestone has said, "I want to do this," and there is no response.

Janice Gault: We wrote a letter of support on the World Rally. A lot of international events have looked at coming to Ireland, both north and south, and to Britain in general, but a lot of it is about bidding for them. You have to be sure that you have the money behind you before you go out to bid, and that has always been an issue. If you go after something like the Ryder Cup, you probably need to have quite a large war chest behind you before you go and bid for that.

Q80 **Ian Paisley:** Do you know how much we paid for the Open?

Janice Gault: I could take an educated guess.

Q81 **Ian Paisley:** It was maybe £3 million, and some of these other events really require that sort of input.

Janice Gault: For example, we staged parts of the Giro d'Italia. If you want to stage events like that or do a warm-up round for Formula 1, all those events have a cost, because you are really buying their brand.

Q82 **Ian Paisley:** It is money well spent. Is that what you are saying?

Janice Gault: It is. The Tour de Yorkshire was this year. They were in Yorkshire. It was all about Yorkshire. It was all about going out on a bike, and you are buying their brand. We always appear to focus on the cost of bringing the event. You are not paying for the event. You are paying in order to position yourself on a global stage, so you can sell yourself. If you see Tiger Woods walking with Dunluce Castle in the background, we cannot pay for that type of publicity.

Q83 **Ian Paisley:** Colin, how can we get more people to turn left when they arrive in Dublin and come up to Northern Ireland?

Colin Neill: I maybe would not use your wording from the last—

Ian Paisley: What about your wording on licensing laws? Let us put it like that. But I might agree with you.



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Colin Neill: It is fair to say Belfast competes against Dublin, as indeed Limerick and Cork compete against Dublin, right across the island. The Republic of Ireland is our second largest market after Great Britain, so we do need an extensive marketing campaign. Again, this goes back to comments on TNI. Fund it at the beginning of the year, rather than piecemeal, where you say all of a sudden, "We have some money. We have to rush out and do something."

That said, we also need then to address the issues in Northern Ireland, such as the infrastructure to our airports. It has been the same road since I was a wee boy. We need to look at air passenger duty, because the key way, rather than getting them to turn left, is to get them to start in Belfast. Then they can do Northern Ireland and, if they like, go on through.

Ian Paisley: We can address things like air passenger duty.

Colin Neill: The first opportunity to take money off people is always the best when you are selling something. We need to address all the transport infrastructure, taxation around APD and stuff. You look around the world. I appreciate there are all sorts of funding implications and European questions around it, but we need to establish a fund to create and draw in those international routes, with more direct flights into Germany and stuff, where we can really grow that market.

Q84 **Ian Paisley:** Colin, while I have you, you are not opposed in any way to the Open. You want to see the Open being a huge success in terms of this licence thing, but you want fair play. Is that really what you are saying?

Colin Neill: That is really it. Tourism in Northern Ireland is really concentrated in Belfast and up the coast. We need a product that can encourage people on. We need to sustain businesses while we grow that tourism offer. We are 100% supportive of the Open. We want it to be an incredible success and, if we could even get some sort of guarantees from political parties that they would put legislation in place for us within six months or 12 months of a new Assembly, I am sure my membership would go, "That is a fair deal," rather than being totally ignored, and seeing someone else come in and everybody bending over backwards. I am sure, if you were in the same situation yourself, you would feel a bit annoyed.

Q85 **Lady Hermon:** Can we clarify your position on this, because it is very important indeed? The consultation that the Department for Communities had about changing the liquor licensing legislation for special events has now closed. What is your position on that? Are you in favour of that?

Colin Neill: No, we have come along the way and always said that it should be done as part of a wider Bill. That said, we are not out to damage the Open in any way, but for me to go back to my membership and ask, "Can we do something to help this process?", they need some



sort of reassurance that it is not cake tomorrow so they never see their turn.

- Q86 **Lady Hermon:** You appreciate it would be very controversial if the Secretary of State was to take through a piece of legislation to change the liquor licensing legislation in Northern Ireland, but was to find herself unable to take through, by the emergency process, legislation to compensate victims of historical institutional abuse in Northern Ireland.

Colin Neill: As we see it, there are a number of obstacles. There is the consultation, and none of us knows yet what the outcome of the consultation has been. There is the decision of the Department as to whether they take that forward to the Secretary of State, and then it is the Secretary of State. Does she, along with other things, want to bring that Bill here? Our part is in that small area. The call of the Secretary of State on any legislation on any topic that is brought here will be judged by her and, indeed, by you.

- Q87 **Ian Paisley:** Eimear specifically, in terms of getting young people to see tourism and hospitality as a career, what needs to be done to fill that gap? Instead of looking at accountancy, banking, being a lawyer or something else, how do they see tourism as the growth sector where kids should be encouraged to go?

Eimear Flanagan: There are a number of things. In many ways, that is where tourism is really playing catch-up. If you look at most people, they will end up one way or the other doing something similar to what their parents did and none of us has a background in tourism. I fluked a degree in Irish history in the 1990s, but I had something for my future. Certainly, there was no tourism environment at all.

If I was advising my 16-year-old self, which I would love to be able to go back and do, if I had known I would be doing this now, I would have taken a summer in a restaurant, another summer in a tour business and another summer in a hotel. I really miss knowing the inner workings of the hotel industry at this stage of my guiding career. There is stuff to do at the 16-year-old level that is in place there to make that happen.

As for the length of our season, we are very fortunate, in that the sun does not shine. The Dutch tourism strategy is built around the tulip season, which is six weeks and climate change is causing that to move. We are effectively running from Paddy's Day and Easter; in and around there it lifts, and it goes effectively to Halloween.

Our biggest way to get that as a year-round salary—so you could say, "That is a career; I am going to earn my livelihood from that"—is business tourism. Our biggest weakness on that, certainly breaking into the North American market, going back to a previous question, it is a direct flight into the north from North America. Americans will go to Derry from Belfast for their dinner and not see it as a long drive. Their sense of space in the island is massive and radically different to us as locals, but



to do an international flight, and then, jetlagged, go to a business conference an hour and a half north, you are really held back.

We have spent 10 years getting guiding training and professionalism to the position where it is today, but that is not endorsed by TNI. We have been trying to gain that and to change attitudes to guiding standards. It used to be a bit of a retirement job. Today our average age is probably in the mid-40s. Ulster University and Belfast Met have come on board. We have a 20-year tourism industry in Belfast and, for the first time, we are teaching tour guiding at the top level. I am doing it. I wanted to do it five years ago. It is difficult for me to take a day out of my business at this stage of my business to do that course, but I am formalising that qualification. The fact that that only exists now is part of the lack of a clear strategy and somebody accountable, ideally a tourism Minister down the line.

Q88 Jim Shannon: First of all, ladies and gentlemen, it is nice to see you. Thanks for your contribution and the hard work you have done over the years. In particular, if you do not mind me mentioning a special welcome to Joanne, my constituents are very pleased to have her here.

Mr Campbell: All politics is local.

Jim Shannon: I could be wrong, but I suspect the house you are now living in is one I was involved in getting the planning permission passed for many years ago. I am very pleased to have you here as well. I have a couple of quick questions. In relation to tourism, I am interested in the Northern Ireland Tourism Alliance. I have always felt over the years that perhaps the councils could work a wee bit more closely with the Tourism Alliance. Down where we live, Joanne, in our part of the country, B&B is a big thing. There are lots of opportunities for that, as there is across the whole of Northern Ireland.

I am just wondering what your thoughts are in relation to working better with councils. For instance, we are very fortunate to have Strangford Lough, to have Mount Stewart and to have the opportunities to bring people to our constituency and to our area, as other parts of Northern Ireland have as well. I am just wondering what your thoughts are. How could you and the councils work better together?

Dr Stuart: The first thing to say is that the councils are all associate members of the alliance, so they were very much part of the founding of it. We work with all the councils. In fact, we have a members' meeting on Friday, where all the councils will be represented. Each of the councils has its tourism strategy. They are investing in tourism. With everything, it is about how we join all that up. There is a lot of work being done now around clusters and there is a cluster down where we are as well. It is things like that that are really important and that the council can really support.

If we want to truly have a regional product, we are reliant on the councils working with Tourism NI to invest, whether it is in Strangford Lough, in



the Gobbins or in different areas, but then how do you join that up? If somebody is coming down to Strangford, how do you connect all that, so they can see the real trail they can go on around Northern Ireland?

One of the other things where the councils are really important is creating those jobs in those areas. There is real entrepreneurship and innovation within tourism, which is not really understood and recognised outside the industry itself. That is where the councils can be very supportive, but they see the importance of having this organisation that can help to bring together everybody who is in tourism, so that we can amplify and maximise the potential.

Q89 Jim Shannon: Do any others have any thoughts upon how better to work with the councils or how we can encourage councils to have a closer relationship? Do you think it is okay? What is your view?

Colin Neill: That is developing. It has taken a period of time with RPA for councils to settle down, but I honestly see them reaching out. You see the collaboration in the city deal now, and that is really to be welcomed, because it starts to cut out the boundaries. Tourists do not see the boundary, whereas I might think Larne is the best place on the planet and not Ballymena.

Ian Paisley: That is a disgraceful comment. *[Laughter.]*

Colin Neill: There are encouraging signs. We are on a journey. People are starting to wake up to tourism, but we have a long way to go.

Q90 Jim Shannon: The figures of visitors to Northern Ireland would indicate that. Cruise tourism is one of the things that Ards and North Down Council has taken advantage of, as indeed have other councils on the periphery of Belfast, I suspect. Can we develop that a wee bit more? Is it your thought that we can? Would anyone like to speak to that? Eimear, do you have thoughts on that?

Eimear Flanagan: I have a cousin who left Belfast a long time who cannot believe that any cruise ships go to Belfast at all, but from a start of one or two back in 1996 we have around 151 docking in Belfast today. It has a massive impact on tourism. There are numerous things Tour Guides can say about cruising. When we apply sustainability, we really need to put sustainability on to the cruise market. For a start, none of them spend the night in a hotel. There is massive growth in the industry globally, but whatever we are doing with cruise tourism should be done in the broader context of all tourism.

By their sheer scale, they can come into a city the size of Belfast and put a massive pressure on our tourism capacity, and yet at the other end cruise clientele tend to be higher end. They want the best service, even though they are often the people who are putting pressure on the quality of our service provision. There is more than Belfast in terms of cruise development. We would like to see a greater level of transparency in guiding work. Although they are currently run by private operators, it is



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very hard for new guides to get into the market. There is a lot, but the biggest thing I would say with cruise development is to wear our sustainability hat.

- Q91 **Jim Shannon:** When people on cruise ships arrive and get off the ships or boats, I understand there are going to be some changes there to make it more welcoming and not just a bare concrete harbour to jump out and get into. There is something there to be done. Maybe the harbour commissioners are looking towards changes there.

Dr Stuart: There is investment in a cruise welcome hub, which is being supported by Tourism NI. Some investment needs to be done, because they are on the ship, and then that experience has to be as high a quality when they come off.

The other thing about cruises is the opportunity for people to taste a bit of Northern Ireland, and then you want repeat visitors. You have people who come in on cruises who would then come and have a holiday in Northern Ireland. Usually you find that, when the tourists come off, they are on to a coach, off to somewhere and then back. It is about how to create a bit more stickiness and, because they are maybe just in for one day, you do not have that overnight for the evening economy.

The interesting thing will be Dublin Port's decision, which comes into effect in 2020, reducing the number of cruise ships coming into Dublin. How does Northern Ireland deal with the opportunity, but also the challenges, that that may cause?

Colin Neill: Credit goes to Visit Belfast. They have done a really good job on cruise tourism in Belfast. While they are not spending fortunes, I will get the figure wrong I am sure, but it is £50-plus, £54 or something, per head. If you scale that up to a lot of people, it is still a big spend.

There are other huge opportunities at the cruise terminal at Foyle Port. Then you start to get them visiting the Province twice, because they can do Foyle Port and come down. You start to spread that money. You start to take the pressure off Belfast infrastructure and the one road that goes to the Causeway. You come at it from different angles. It is a segment we should be in and a segment we should grow. It is a really useful barometer of how we are viewed, because if you are sold on the cruise market it is a bit like that expression: "Who would come on a cruise to Northern Ireland?" It is a sign of how you are being viewed in other markets.

- Q92 **Jim Shannon:** The other question I want to ask is to do with the air access. The statistics are quite clear: 8.5 million passengers are flown through the three airports. There was a 3% increase in the previous 12 months. People residing outside NI account for 41% of passenger flow. There is a lot of good stuff happening with that air access across Northern Ireland and further afield.

We need to be realistic about what we can achieve. To have one or



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possibly two air flight connections in the States is probably what we are aiming at. I will put it forward as a question and I would like to get your thoughts on it. Is there not a better way that perhaps we can work together with Dublin Airport? Let us be honest. I do not know how many cities across the States you can get access to from Dublin Airport, which we will never achieve or hope to even match in Northern Ireland because we do not have the population. How can we do it in a better way and a constructive and co-operative way?

Colin Neill: My view would be that it is both. We need to create the direct flights into the north and then maximise what we can achieve that is coming through Dublin. I have a chequered career history and was involved in urban regeneration and stuff. If you go into a shopping centre, the first shops are where you get the money. If someone comes in through southern Ireland, they have spent a degree of their money before they come north, and they may decide they have seen enough. The ideal situation is getting as many people as you can to come through Belfast, but do not ignore the huge opportunities that come through Dublin.

Q93 **Chair:** Is there anybody working on looking seriously at just getting one decent, big, wonderful airport in Northern Ireland, rather than three competing with each other? Is there anybody doing any work on that? I know there are some people who would like it.

Janice Gault: They are three private companies.

Chair: I know that, but I mean in this structure of tourism and Government.

Janice Gault: You would have to effectively close the three airports if you wished to do that, and that is not something that is being looked at. It would be one large airport and no small airports, but I do not think it is being looked at. They are private companies.

Q94 **Chair:** I know that, but, if we had a blank sheet, would we not say that one airport in Northern Ireland somewhere would be better, with good structural links and all that?

Dr Stuart: I am not aware of any discussions and this is where we have to appreciate the size of Northern Ireland. Even if we had one airport, I cannot see how we would develop it to the scale that we would need if we were not to rely on the likes of Dublin Airport. Going back to the question, we also have access via London Heathrow, so long haul flights can come in there and then come into Belfast. APD really hits us, because you are then into domestic flights, so that is something.

When people come into Dublin, they more or less have made up their mind on their itinerary, so we have to have better relationships with the tour operators and the inbound operators. Tourism NI and Tourism Ireland facilitate a lot of that for our industry in Northern Ireland, so that their itinerary is decided. We could work with the airport with regard to



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making the experience of getting the bus or the transport option up to Northern Ireland a bit more of a quality experience. It is a great service that we have, but you have to go outside and different things. There is probably something around that.

Also, then, it is the links from Dublin to Belfast and beyond, so that there is no perceived border on the island, so it is seamless for people when they come up. I do not have enough information yet, but one of the things I am looking at is the way we manage visas and all that type of thing, because the Chinese, Australian and New Zealand markets are ones that are quite interested in Northern Ireland. It is how we make the whole thing a good experience for visitors.

Q95 Jim Shannon: More than one airport can have the international flavour. I am ever mindful that Dublin has the advantage that, if you are going to America, you can get tourism clearance at Dublin or at Shannon, so there is an advantage there that our other airports do not have. That is a factor for some people. Having done it both ways and having experienced the custom clearance on the far side, it took almost 90 minutes or thereabouts to get cleared, whereas you can do that in—let us be honest—20 minutes at Dublin at the very most, and that is because you are in a queue and you are always moving. It is a bit like Disneyland: if you are always moving, you think you are going somewhere.

I have one last question and it is in relation to hotels. I would like to get your opinion, perhaps collectively, on whether you think there is enough hotel accommodation in Northern Ireland to respond to the tourism potential that we have. I think our tourism can still grow. I have always been of that opinion and I believe that to be the case, but are we in a position to do that? B&B is okay for those who want B&B, but many others want to have hotel accommodation.

Janice Gault: We have increased our hotel numbers by roughly 22% or 23% in terms of rooms. We have 55 different projects in various different states of planning, consultation or whatever way they are. We have had a massive influx of hotels just at the end of a big spin-off. The last big spin-off we had was between 2006 and 2008. It does represent a significant investment.

If you want to have more hotel product, my suggestion would be to set up a framework within which hotels flourish. We have to trade 365 days a year. We meet a pretty strict criterion in terms of licensing and there are other platforms that are simply not adhering to that. Everybody wants a hotel for a lot of different reasons, not alone that it is somewhere social in the centre of a town. It brings life. It brings people who are going to stay. All of that is very important.

One thing about not having a laid out strategy is that we often concentrate on the bulk of visitors we want as opposed to who we want. That is an important thing. The big news at the moment in our industry is rationality and seasonality, which really means taking people to different



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regions at times outside the peak. All businesses can really benefit from that, particularly us.

In your manifesto, there is the dream of 3,000 bedrooms. Since that was published, we have created 1,800, but if you want more hotel bedrooms, there has to be better support for this industry. I had two hoteliers who spoke to me last week, one from out of state and the other a local person, and both of them are very reticent about investing further because they cannot get people. They said, "We cannot get staff. We are a bit unsure".

There is also limited recognition, in that, if you go to a school and talk to the teachers, for example, there is nothing of our industry on the curriculum, so nobody understands what they are coming into. I had a conversation with a very senior civil servant, who was mesmerised to find out that people in the hotel industry earned £70,000 or £80,000 a year. We are an industry that pays well and offers you the opportunity to proceed up the ladder. There are about 5,000 businesses in tourism and, much as hotels may be the backbone of it, they support a lot of other businesses. If you are in the tourism industry and you start off as a chef, you can by the time you are 21 or 22 effectively have your own business. Hotels are important, but we have spent a lot of money building additional hotels against a background of really very little assistance. That is the way it has developed.

- Q96 **Jim Shannon:** The reason I ask the question, and I am not sure you will have an answer to this, is that there has been some indication in my own constituency, where there have been a number of applications, of interest in building hotels, perhaps another one in the Newtownards area for example, but it never ever got anywhere. I always wondered whether it was because people were uncertain or whether it was because they did not think the potential was there. I think you are saying the potential is there, but the uncertainty is in relation to jobs and those who can perhaps work through the hotels, if I am getting it right. Is that correct?

Janice Gault: A hotel is not a fast return on your money. It is about a 30-year investment. If you take your hotel and you build it today, you will turn money on it at an operating level, but if you were to put £5 million in the bank, although interest rates are currently very low, you maybe would not be taking the risk and there may be a better return. A lot of people are nervous about investing in more hotel product at this moment in time.

- Q97 **Mr Campbell:** There was a reference made at the start of your presentation, I think by Colin, that tourism generally is looked upon or regarded by Government as a bit of a twilight industry or twilight zone. Certainly, that has been my experience.

I would like to hear each of your views on a proposition I have put both to Invest Northern Ireland and to the NIO. Take the Open in six weeks' time. There are two-plus factors there that do not apply to any other



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event anywhere else on the island of Ireland in this year. One is the scale of it, with 200,000 people. The other is the number of high net worth individuals who will be coming to the Portrush area, some of them for the first time. My view is that not sufficient work has been done; I would like to hear yours. While most of those people are coming for three, four or five days to enjoy the golf, because some of them are high net worth individuals, has sufficient advantage been taken of their presence to see what economic opportunities would flow from that? That is on the Open, but is that applicable to any other events and have they been maximised?

Dr Stuart: I am probably not the one who has the most knowledge about the Open, to be honest, but when you get people in, you want to be able to take that opportunity, particularly when they are high net worth individuals. They will be treated from a VIP perspective on the hospitality side of things, in order to meet the right people in Northern Ireland to talk about different opportunities.

Our tour guides are meeting with a lot of high net worth people coming into Northern Ireland, and it is about that story-telling and tour guides being able to give that broader perspective as well. Eimear, maybe you want to come in on that.

Eimear Flanagan: I suppose that is one of the misperceptions I had coming into the industry. I went into the hiking and there is definitely a misperception that backpackers want to sleep in hostels. I can assure you they most definitely do not. They want to stay in Bushmills Inn if they are hiking the Causeway Coast.

There is high spend, especially from the American market. They are very keen to spend. They deal with money in a different way than we do. There are a lot of chauffeurs and driver guides. I got myself a tour bus last year, but spent months trying to get myself a licence to trade. Part of our broader perspective is how much everybody needs to be in tourism and every department needs to be looking at what they are doing through the lens of tourism long-term. The impact of the Open is, in the long term, what happens after we showcase the Causeway Coast to this market.

There is a higher market than you would be aware of already in Ireland, and they travel round Ireland. They are chauffeur driven round Ireland. There are a lot of private businesses based in the south that are coming to the north. We are younger in everything we do in the north. We are just younger and newer, and sometimes southern-based tourism businesses are just more established. They have good contacts in America. That is growing; it is growing all the time. I see helicopters all too often over the Causeway Coast, so there is definitely a premium end.

The big money area of business tourism is incentive travel. I was honoured to host a SITE fan trip 18 months ago or so, and that is the international body for incentive travel. They had come to an event in



Dublin and TNI funded a trip up north. We have absolutely world-class music, food and drink. We can compete there, but most people working in tourism know nothing about that level of business tourism. We shoot ourselves in the foot sometimes with showcasing this great stuff.

Q98 Mr Campbell: If I could just interrupt you, this is what I am aiming at here. I would fully expect that 99% of the people are coming specifically for the golf. That is what they are coming for. They come on the Wednesday and stay until the Monday or whatever. Have opportunities been taken to get some of those people who are here for the first time, who are high net worth individuals, to come back again? It may not be about the golf, but they have enjoyed the experience. The red carpet has been put out for them and they have really enjoyed themselves. They have been to places they have never been to before and then they come back with an eye to business and driving an economic generator of their own, whatever business they are in.

Do you detect that being taken advantage of, whether it is in Belfast, Londonderry or wherever else? People are coming, they are going to the golf and they have been targeted by Invest NI, because they are operating in a business that may well develop in Northern Ireland and they have an insight into a business opportunity. Invest NI are going to say, "We are going to get this guy back here after he comes in July."

Janice Gault: There are a couple of things within that. First, on the visitor mix, quite a number of the people who are coming to it are not in the group that you suggest. Also, some of them are not coming for five days. They may only be coming for one or two days. That is not to say that that is not an opportunity. A number of them are being invited by sponsors and the sponsors have paid significant amounts of money to have these people's time. If I am buying three Rolexes a week, I assure you that Rolex is very keen to sell me a fourth. Therein lies part of getting those people there and then bringing them back afterwards, where they have seen Northern Ireland is great.

I do not know how much of an opportunity there is to interact with them when they are there, but it is up to us to grasp that opportunity and say, "I went to the Open in Northern Ireland and it was great," and "I went to Portrush and that was a really nice place. I am interested in"—whatever it is. The Open is very strictly controlled as a brand, and access to the people who are invited to it is pretty strictly controlled as well. The R&A is very conscious of that but, for us, the opportunity is after the Open. With people with a specific interest in things, who maybe have been there, we have the opportunity to follow up after that.

Secondly, we have the opportunity to go after other golf competitions that may be of interest to high-end sponsors. It is not primarily about golf; in fact, a large number of people who would be at the Open are, I suspect, going to the Open because it is the Open, not necessarily because it is golf.



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Colin Neill: I do not have a lot of engagement with Invest NI, but I would like think it will be doing all it can to interact with the high-end sector of the audience. Again, the benefit in Northern Ireland for the Open is that the accommodation is not all in Portrush, so people are staying in Derry/Londonderry, Belfast or, indeed, all round the Province. That is a great way of exposing other regions to them. They are travelling back to the cities. I know there has been a bit of work done to try to extend people's stay beyond the golf, so I would hope that Invest will see the opportunity and have a few targeted individuals at least that they would think worth—

Dr Stuart: The other thing is the visibility of Northern Ireland, and people watching the Open, not even being here. The fact is that we can hold the Open. You will see the golf course and the gorgeous scenery et cetera. I have previously been involved with foreign direct investment in technology and the knowledge economy and, when people are coming in, part of the sell to them is the tourism piece because they want people to have a good quality of life. They want to have things that they can do. The fact that we are holding the Open shows that we are secure. We are a good place to be. Then it is a follow-up with them. Invest NI can use the fact of the Open being here and the success of it. That then also acts as a hook to lead on to that foreign direct investment and the economic piece.

Q99 **Bob Stewart:** Ladies and gentleman, you are in the business of selling Northern Ireland, right?

Dr Stuart: Absolutely.

Q100 **Bob Stewart:** So why the hell should I come to Northern Ireland on holiday? What is your unique selling point? I do not like golf and I am not very keen on TT, so what is the unique selling point that you would say to me for me to bring my family to Northern Ireland, which I have, by the way?

Colin Neill: Food and drink.

Q101 **Bob Stewart:** Drink is fine. The food is good. But what is it that would make, say, Europeans want to go to Northern Ireland from, say, Germany?

Colin Neill: Our food and drink is world class. It absolutely is.

Bob Stewart: You have your whiskey.

Colin Neill: It depends how you spell it. Beyond that, it is the people. Northern Ireland is unique in that, with the greatest respect to other destinations, tourism is quite new to us, so we are real. We have not laid on that plastic façade for tourism. What you see is real. The experience is real. It is really up to us to try to keep that because other tourist destinations—

Q102 **Bob Stewart:** Forgive me; I am playing devil's advocate, because I know



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I would go to Northern Ireland for a holiday.

Colin Neill: I know you have been before.

Q103 **Bob Stewart:** I used to have the Bushmills distillery in my area, a very nice area. I am coming, so how do I come? You would come on a ferry, in a car, from England, Scotland or Wales. You can come on an aeroplane or you can get off a ship. Where is the biggest market? Where do you get the most tourists coming from: ships, ferries or aeroplanes?

Colin Neill: Flights. GB is our largest market, so it is flights. That is why the air passenger duty is so key.

Q104 **Bob Stewart:** That is the reason we have Londonderry and two airports. The international airport is Aldergrove, is it not?

Janice Gault: Yes.

Q105 **Bob Stewart:** Then there is George Best. Do you go from George Best direct to the continent?

Dr Stuart: Yes.

Q106 **Bob Stewart:** How much comes up from Dublin or Shannon? You are part of a package.

Colin Neill: It is over 70%. That is of our out-of-state visitors, not GB, obviously.

Dr Stuart: Some 50% access Northern Ireland via the Republic of Ireland. When you then look at the individual markets, 75% of visitors from North America come through Dublin, and 66% of those from Europe enter through the Republic.

Ian Paisley: It is important because some things are worth saying about the airport. The facts are stubborn things. The combined passenger throughput of Belfast International and Belfast City makes the two Northern Ireland airports the second busiest airport location for GB passengers in the whole of the United Kingdom. To the idea that they are little pesky airports not doing a lot, take Aldergrove on its own: it is the third busiest UK airport for GB passengers. To the idea that it cannot compete with Dublin, it can. Its problem is that Tourism Ireland markets Dublin Airport around the world. It markets Shannon Airport around the world. It does diddly-squat for any Northern Ireland airport.

Bob Stewart: I do not blame it doing for that. We have to end. Thank you so much. I am a convert. I want to come to Northern Ireland with my family. I have been to Northern Ireland with my family and I have come on a ferry. The fact of the matter is that you have to get that USP out. What is the unique selling point of Northern Ireland? You have to overcome the Republic's selling point too.

Q107 **Sir Desmond Swayne:** Dr Stuart, you implied that Northern Ireland was in want of a tourism strategy.



Dr Stuart: Yes.

Sir Desmond Swayne: Were you to have one, what should it look like?

Dr Stuart: It is about setting out that ambition for growth. We have all come behind the ambition that we want to double the size of tourism by 2030.

Q108 **Sir Desmond Swayne:** That is an ambition, not a strategy.

Dr Stuart: No, it is an ambition but it is how you set out the strategy to get there. It is about understanding where our markets are, the people we are trying to attract, and then setting out the environment that we need. There is going to be investment, so do we need another world-class attraction? We have some at the moment but we could probably do with another one. It is about that investment. It is about how we ensure that we can get people around Northern Ireland. That is around our infrastructure and our planning, and the skills we need.

If we are going to be double the size, this means we are going to need at least another 25,000 people in the industry, so new jobs. We know that about 2,500 people a year are going to leave the industry, so we need to have people who want to come into the industry and we need to make tourism more attractive. We have to show that there are career paths, that there is flexibility within the tourism business, and that you can build a professional career. It is about identifying each of those things that we need to have, so that we are in the best place to achieve that vision. That is where taxation comes in, as well as the legislation and regulation within tourism.

It is also about ensuring that we are sustainable. If we are suddenly going to double, how do we manage the capacity within some of our key attractions? So much needs to go into it but we need to have that ambitious strategy. People outside tourism need to see that this is what we believe we can do. Then the strategy has to set out how that all works. There has to be a focus, if we have an Executive back and if we have that Minister for Tourism who can bring all the different aspects together, including the council, so we have this one strategy where we are all moving in the right direction.

Q109 **Maria Caulfield:** To go back to some of the infrastructure that you have talked about, in terms of rooms, if there is an Assembly back up tomorrow and a tourism strategy was being put together, what is the need? We have talked a lot about hotels but there is B&B and self-catering. What is the occupancy rate at the moment? If tourism was to increase, how much extra capacity is needed in terms of rooms, whether in hotels or B&Bs?

Janice Gault: Currently there are about 26,000 bedrooms in the regulated market, which is bed and breakfasts, guesthouses, guest accommodation, hotels and campus accommodation. Occupancy in hotels is generally done in two different ways. It is done by a commercial called



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STR, which is the world leader. Our occupancy last year was about 73% in hotels. In the other sectors, it is much more difficult to work out categorically what the occupancy is. The reported figures suggest it is somewhere between 35% and 37%. Part of that is slightly skewed because some of those products do not open all year round. A number of them do not see the opportunity or do not wish to open all year round.

Q110 Maria Caulfield: In those figures, which are quite low, for the non-hotel rooms, is there a need for more accommodation? Is it that it is needed in certain areas and that it is not distributed to where the need is?

Janice Gault: If you have a very busy summer, every weekend is full, and then during the week you are empty. It is that sort of market. Our market has grown dramatically. There has been dramatic growth, particularly in the hotel sector, where the supply is well ahead of demand at the moment, but that will right itself. Generally, once a market reaches 75%, there is a desire to expand it. Tourists now look for quite a different type of experience. Bob has spoken about coming to Northern Ireland. People will quite often come and stay in a hotel the first time for a night, and then they will move on and stay in guest accommodation or something else. In our experience, people want to immerse themselves in local life. Particularly if they are from the continent, that is what they want to do. That is an important thing for us to recognise.

It all really, I suppose, boils down to this issue of the strategy. We need to be very clear on what type of visitor we want, when, in reality, we want them, what we have to offer them and how we are going to go about getting them.

Q111 Maria Caulfield: We have different types of accommodation now coming online, like Airbnb. How does that fit in to the sector?

Janice Gault: Airbnb is a platform. Airbnb has everything on it from, currently, some hotel bedrooms through to self-catering and staying in your own house. The legislation within Northern Ireland states that, if you provide tourist accommodation, you have to be certified and licensed.

Q112 Maria Caulfield: But Airbnb is happening in Northern Ireland.

Janice Gault: It is, yes.

Dr Stuart: They produce reports. We do not have very detailed reports but up to June 2018, for that year, there were over 4,000 listings in Northern Ireland. That generated about £55 million in spend. The thing with Airbnb is that, as Janice said, it is very hard to know when people are not providing that all the time. People can come in and out of it. It is something that we need to consider. There is an increase in individual travellers who go on and want to create their itinerary and find their own accommodation, rather than going through tour operators. The challenge we have is that we have so little data on tourism in Northern Ireland that we can analyse in that depth to really understand where the gaps are.



Q113 **Maria Caulfield:** Why is that?

Dr Stuart: Again, it is very disparate. For me, coming in and even trying to get the economic figures around tourism, it is difficult because it is all around the visitor numbers and overnights. It is all really good information but does not get down into the detail. We still do not have official figures for 2018. They will not come out until June. That is really difficult for business within tourism. How do you plan? How do you really look at the trends? With the strategy, if we are going to focus on Russians living in London, or the German market, how do we help our tourism businesses plan for that?

Q114 **Maria Caulfield:** Who should be responsible for pulling that information? As Desmond said, if you want to pull a strategy together, you need that information from the start and then to measure progress going forward.

Dr Stuart: At the moment, our stated data is primarily produced by NISRA, which is the Northern Ireland statistics. Tourism NI would then produce some information but we certainly are not getting our information as quickly as they would get it in the Republic, for example, through their agency, so I definitely think there is something around trying to give us more information in a timelier manner.

Q115 **John Grogan:** I have a few questions, following up what some of my colleagues have mentioned. Unlike Bob, I do like golf. I just regret that there is no free-to-air live coverage in the UK. There is in the States, which is good, but the highest viewing figures will probably be the BBC highlights of a million.

There is something coming up, is there not: the football World Cup? Windsor Park, as I understand it, is part of a bid from Ireland and the UK. Would that not be tremendous in 2030: the biggest joint sporting event that there has ever been between the UK and Ireland? I just mention that in passing.

On licensing, which has come up, I am sympathetic to the idea of change. You are suggesting fairly modest changes: it is basically Friday and Saturday nights, 104 days a year. In our brief, we have an intriguing sentence about how you were quite close to it before the Executive collapsed. Was the consensus beginning to be formed in Northern Ireland among the different political parties? If the Assembly came back, would it be done in the next year? Would you be confident?

Colin Neill: There was consensus coming together. The Bill that was introduced was a modest Bill but it had pretty much finished Committee stage, and there was a lot of discussion between us and the parties on changes, improvements and balances. This is not about selling as much alcohol as we can get off the shelves. We sell an experience today. It sounds strange but nobody goes to the pub for a drink. If you want a drink, you buy it in a supermarket and sit at home. You go for that experience but it needs the right time. I am confident that, if the Assembly had stayed, we would have had a Bill within months. I do not



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claim that we would have got all we had asked for, but it would have been a significant step forward. I think there is a will among the parties, which is why I mentioned this earlier: if we could even get a commitment from our parties, saying, "Once we are back, we will do this in a timeframe for you", I honestly think it could be done within a year without any trouble.

Q116 John Grogan: Civilisation would not come to an end if you could stay in the Crown until midnight or 1 o'clock. At least in the pub I know best, opposite where we stay, it would not. It is inhibiting compared with other destinations.

Tourism Ireland was one of the six areas of co-operation, which have not been mentioned yet today, in the Good Friday agreement. Do you have good co-operation with Tourism Ireland? The figure is that 50%, 60% or 70% of European and North American visitors coming to the north start in the south. Is it working?

Janice Gault: It is our only route to the international market. Our members believe that the sum of the island of Ireland is greater than its individual parts. We need to do some work on developing a Northern Ireland proposition, which is underway. It currently accounts for about 61% of our spend, which is the big thing. It has been in existence for a large number of years, and to reinvent it would be quite difficult.

The other side of it is that Tourism Ireland is about selling what is there, and there is a big argument to be made for a better look at both the capability and the product development in Northern Ireland, which would sit under the realm of TNI. In order to do that, we would need to significantly readdress the issues of budget. We are very good at building things in Northern Ireland. We are particularly good at developing it, but we tend to miss the opportunity by not having the appropriate funding to promote it.

We are about to do an eight-week all-Ireland food fest. This year, it will be primarily focused on the domestic trade; next year, it will be focused on the international market. We have a number of DOP products—Armagh apples, Comber potatoes and some other things—that we could really promote very well but, unless there is an appropriate level of funding, that will not be possible to do.

Colin Neill: The only thing I would add to Tourism Ireland is specific targets. If you do not have a target, you cannot measure performance against it. Then it is about as much co-operation as possible between Tourism Northern Ireland, Tourism Ireland and, indeed, Fáilte Ireland, so that we all get the maximum benefit.

Dr Stuart: We have seen that increased co-operation between those three organisations. Going back to Janice's point, we have reduced our spend with Tourism Ireland for promotion, whereas Fáilte Ireland has significantly increased it. When you are going to promote properly, it



requires a level of funding. Tourism Ireland brings to the table the resource it has across the globe and its support of the Northern Ireland Tourism Alliance. It has put in additional resource to have Tourism Ireland here strategically in Northern Ireland, working with the industry as well. With anything, we could always do more with regard to promotion, but it is about getting the branding right. We look forward to Tourism Northern Ireland launching the new experience brand for Northern Ireland and that collaboration to make sure we are amplifying that message.

Q117 **John Grogan:** My final question is on so-called "Troubles tourism", which has not been mentioned yet. Does that help deal with legacy issues and so on? Do you have any comments on the general issue?

Eimear Flanagan: Political tourism has been an interesting one from where we came from. To give political tourism its due, those working in the Falls and Shankill Road in the very early days of tourism were among the first to see the broader tourism for the city of Belfast. Belfast City Sightseeing's early roots come directly out of that tourism, although I do not know whether anybody said, "Let us attract people on the world stage to this." Having guided over 1,500 tours of Belfast, for the demographic around the world who grew up watching Belfast on their television screens, there is a lot of brand awareness in a negative way, but they are utterly fascinated seeing west Belfast today.

We do have a bit of a perception that our peace wall is a peace wall. I do not know how people come to that conclusion but I look forward to the day where our political tourism can maybe evolve into a peace wall that will be in celebration of our story.

Tremendous work has been done on the ground with cross-community groups and with ex-prisoners in terms of taking and training tour-guiding skills. One quote I had from a review of the experience was that it "resulted in some unusual friendships". There was also a missed opportunity, though. Without blaming anyone, at a political level, we were not able to harness the economic opportunity of political tourism and see it as a way to attract people in or a story to tell. The living history of it, like you would get in Berlin, is history.

One tour that stood out particularly dramatically for me was a few years ago, in the dead of winter. It was a city tour. I had two groups of school students from the north and the south of Ireland, and we did the whole of the city, which included the west. I also had five or six over-55-year-old American tourists. At the end of me doing the whole story of Belfast, I realised it was the 17-year-old kids on the island for whom this was maybe boring history, and yet it was the 55-year-old-plus international spending market who were fascinated by the experience.

It will change. We have all got older. The story is longer ago. We are probably able to deal with it better. I would encourage that we do, because the story will never go away. The root cause of the issue will be



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like the race issue in America. It will be re-managed but will likely always exist. We cannot ignore it at a strategic level, and we have done. We have the Giant's Causeway and so many world-class products, so why would we talk about our period of conflict? However, it can fit into the tourism experience. The international visitor is fascinated. Terminology that is highly politically weighted—Northern Ireland, the north, Derry, Londonderry—means nothing on the international stage at all. There we go; that is my political tourism spiel.

Q118 Lady Hermon: Eimear, I can say this as a compliment. We can understand why you are a tourist guide, and that is meant as a compliment. It has been very interesting evidence from everyone this morning, fascinating actually. Because you work at the coalface in this industry and reflect to us the views that we need to hear and have not been able to hear because there has not been an Executive and there has not been a committee at Stormont taking evidence from you, it is very refreshing to hear from all of you today. I know that progress is being made in the absence of an Assembly.

The last time we took evidence about tourism, one of the keys was air passenger duty. It has been mentioned and we moved on very quickly, but how transformative would it be to tourism in Northern Ireland if this issue of APD could be dealt with by the British Government? The answer is "huge".

Colin Neill: All the research says "huge". That and VAT are the two huge catalysts that would change how we perform. Belfast International Airport tells me that, if domestic APD was done away with, it would expect an extra 2 million visitors or people travelling through, whichever is the right term. It would just transform that.

Q119 Lady Hermon: This is domestic APD coming from Great Britain.

Janice Gault: Long-haul APD has already been dealt with.

Q120 Lady Hermon: It has been, and that was dealt with very easily and very successfully. Then, of course, we lost the direct international flight.

Janice Gault: Part of the APD issue is a selling issue as well. It shows that you are serious about air travel, and that is where Dublin Airport has really capitalised. They have shown that they are very serious about air travel and about air connectivity. Many people forget that Dublin is acting as a hub. On an awful lot of North American flights, people are not staying in Dublin but going straight to Europe, so they are using their APD as a means of getting people through the airport. They are maybe getting a smaller spend on them but it means that it makes a larger aircraft more economically viable. That is one of the problems with airlines now. Airlines look at an aircraft as an asset and they just put it where they can get the most money out of it. The type of aircraft that we had on the route from Belfast is not really economically viable unless you can really pump the front end of the plane, which I think has about 24 seats.



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Dublin has used APD as a methodology of really setting itself up as a hub, with eight flights a day to the Middle East, flights to Turkey and now direct flights to China. It is using that as a way of driving itself as a hub and as a route into Europe. For us, APD would be a really good piece. Our biggest market is GB, so it would make us more competitive and perhaps more attractive to come to. It would also give the airports an opportunity to go to the airlines and say, "Listen, people are serious about this. We do want to have a flagship carrier here that is able to drive business through this airport." Unfortunately, when APD was looked at before, it was slightly too late. Had it been earlier, we may have got one of the big carriers that would have used Belfast as a hub.

Dr Stuart: The other thing for Belfast, particularly with the GB market being so big for us, is that we just do not have alternative ways for them to get here. I know there is the ferry, and it is such an easy connection in terms of time. It is quicker to get to Belfast from London than it would be to get to Manchester on the train, but we are, as I say, making it more difficult and more costly through APD, so it would be transformational.

Q121 **Chair:** That has been a really interesting session and it has covered a wide area. Finally, on my point about Northern Ireland being very small, do any of you ever worry about some of the beauty and wonderfulness of the quietness and peacefulness of parts of Northern Ireland, the more and more we have coaches and people having to book and go round in dozens to see it? Is part of our strategy, when we get it, going to be about how you balance this? Otherwise we spoil what sometimes people are coming for.

Janice Gault: Sustainability is one of the key things that we will have to look at, which is why it is not the amount of tourists we have, but who we have and when we have them. Parts of Northern Ireland were full last year. The Giant's Causeway was full. Other countries have managed that journey very well. It is part of being hard to get. If you are hard to get, you suddenly become much more attractive. New Zealand is very good at managing where people go to and ensuring that people have a really good experience and want to come there, and that it is economically sustainable, viable and really beneficial.

Dr Stuart: That is why the figures are really important. We talk about visitor numbers but, as you said, it is not about visitor numbers but about where the spend is economically. The National Trust is leading on some work particularly around Giant's Causeway. With over a million visitors last year, how do you manage that capacity, keep that heritage in the right way and ensure that the tourist has a good experience? That report will come out with recommendations about management, but the whole tourism product management is critical and needs to be part of any strategy.

Chair: Thank you all very much indeed. It has been very useful and I am sure we are going to make great use of your evidence.