

VISITOR INFORMATION PLAN 2024 – 2030



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1. PURPOSE OF VISITOR INFORMATION PLAN

1.1 Context

In 2010 the Visitor Information Plan for Northern Ireland was published covering the period from 2010-2020. Following on from the implementation of the Review of Public Administration and in the light of these changes, Tourism Northern Ireland (TNI) commissioned to conduct a mid-point review of progress and prepare an updated version of the Visitor Information Plan in 2016. The aim was for this Plan to be revised and finalised when a new NI Tourism Strategy was completed and approved, and ensure it supported a new experience brand which would be the focal point of TNI's marketing programme for the years ahead. In 2019 the new Northern Ireland tourism experience brand "Embrace A Giant Spirit" (EAGS) was launched, providing a new clear visual identity for all tourism marketing led communications and experience brand pillars and characteristics acting as a framework for the consumer facing tourism industry and all visitor information touchpoints.

The onset of the COVID-19 pandemic in 2020 radically impacted the tourism industry and visitor landscape. As we move firmly into a post pandemic tourism market, this is an opportune moment to review and refresh the Visitor Information Plan, reflecting the many changes which have evolved in both visitors and across the industry. Additionally, in November 2023 a draft NI Tourism Strategy was published by the Department for the Economy (DfE), enabling a vision for Visitor Information to be reflected against this draft strategy.

1.2 Strategic Aims

In November 2023, the Department for the Economy (DfE) published a draft Tourism Strategy drawing a clear line as to how tourism plays a role in delivering a better economy with benefits for all the people of Northern Ireland aligned to the following strategic pillars:

Innovative: We will build on our culture of innovation and creativity to deliver positive change. We will pursue excellence and world class ideas to make our industry more competitive and sustainable.

How Visitor Information can contribute: Innovation and creativity is often at the heart of visitor information, from its use of technology and digital platforms to disseminate information and through innovative ways of working with consumers and industry.

Inclusive: A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.

How Visitor Information can contribute: Central to visitor information is the dispersal of visitors across regions and all of NI, promoting the tourism and economic benefits to as many as possible.

Sustainable: We will build upon Northern Ireland's unique journey of regeneration. We will evolve our tourism ecosystem to be greener and sustain and invigorate our people, our place, and our natural environment. We inspire future generations to thrive.

How Visitor Information can contribute: By frequently servicing the domestic NI market, the visitor information centre network directly facilitates sustainable tourism through promoting a greener travel footprint and encouraging repeat custom.

Attractive: To inspire and energise others through our passion, enthusiasm, pride, determination, and Giant Spirit. Our spirit will set us apart and make Northern Ireland a great place to work, live, visit, and invest.

How Visitor Information can contribute: The human touch and personal service of Visitor Information Centres directly deliver the Giant Spirit of Northern Ireland and aligned to the

Embrace A Giant Spirit experience brand through the “Big-Hearted” nature of its welcome to visitors.

Collaborative: We collaborate widely in a spirit of true partnership. We nurture a shared vision and common clarity of purpose.

How Visitor Information can contribute: Working together across councils and tourism destination organisations as a Visitor Information Centre Network has collaboration at its core purpose.

Furthermore, following the restoration of the NI Assembly in February 2024, the Minister for the Economy outlined his vision of the economy against four key principles. Whilst these principles apply to the whole economic sector of Northern Ireland, they reflect the role tourism can play such is its impact across the economy, and by extension the role visitor information can play:

Good Jobs

How Visitor Information can contribute: through information, inspiration, and advocacy of visitor discovery, improving the economic benefit of the promoting the growth tourism sector across all of Northern Ireland.

Regional Balance

How Visitor Information can contribute: Central to visitor information is the dispersal of visitors across regions and all of NI, promoting the tourism and economic benefits to as many as possible.

Net Zero

How Visitor Information can contribute: By frequently servicing the domestic NI market, the visitor information centre network directly facilitates sustainable tourism through promoting a greener travel footprint and encouraging repeat custom.

Productivity:

How Visitor Information can contribute: By sharing and working together for common goals across all stakeholders, partners, and industry, for the mutual betterment of the tourism sector and in turn the productivity of society as a whole.

This is a snapshot of the role Visitor Information does and can play in achieving these key strategic themes. The purpose of this Visitor Information Plan is to re-examine, re-focus and re-imagine Visitor Information provision across Northern Ireland whilst re-framing the role it does and can in future play as an integral part of the Draft Tourism Strategy and DfE priorities,

1.3 Objectives of Visitor Information Plan

Alongside these strategic aims are the specific and measurable objectives which Visitor Information and the Centre Network will seek to deliver.

To deliver an agreed strategic and operational framework of Visitor Information provision to maximise visitor experience and positively benefit the tourism industry of NI financially and reputationally, by:

- Increase length of stay and maximise visitor spending within NI.
- Maximise repeat visits and recommendations.
- To make it easy for potential visitors to plan and book their visits to/within NI and to navigate around NI.
- To ensure the highest quality of personal visitor welcome and information provision at key gateways, destinations, and attractions.

-To enhance the reputation of Northern Ireland by promoting a welcoming, fascinating destination and a consistent sense of place.

2. CURRENT VISITOR INFORMATION OPERATIONS

Visitor Information operations can be placed into two distinct outputs:

1. Visitor Information Centres
2. Visitor Information Online Platforms

It is important that the information provided to the visitor is coherent and consistent across digital platforms and visitor information centres. Providing a seamless and consistent service is of paramount importance. In the Northern Ireland context this is made much more challenging because the remit for Visitor Information provision is a Local Authority function. Unlike our counterparts in Visit Scotland and Fáilte Ireland, where visitor information provision, including the management of Visitor Information Centres, is fully owned, and operated by the National Tourism Organisations (NTO's), VIC's in Northern Ireland are mainly owned and operated by the 11 Local Authorities (LA's). This makes the streamlining of visitor information services, be it VIC's or websites, a much more challenging task. It is essential therefore that Tourism NI provides leadership, both strategic and operational through the Visitor Information Plan (VIP), to encourage and empower LA's and DMO's to shape their visitor servicing policies and structures in a way that provides a seamless service to the visitor across Northern Ireland.

2.1 Visitor Information Centres

Current VICs in Northern Ireland:

39 VIC operations in total.

-7 are seasonal.

-1 is an unstaffed visitor information point.

-14 are operated outside of full council control.

Location

-24 are housed within attractions / other visitor buildings.

-10 are bespoke VICs.

-2 are within council buildings.

-3 are located at visitor gateways.

Belfast City Council: Operated with Visit Belfast

Visit Belfast Welcome Centre: Bespoke

Passenger Arrivals:

-Belfast International Airport

-Belfast Cruise Hub (seasonal)

-Belfast City Airport (unstaffed visitor information point)

Antrim and Newtownabbey

Gateway Centre at Lough Neagh Antrim: Attraction / Other Visitor Building

The Junction Shopping Centre: Attraction / Other Visitor Building (operated by SLA)

Causeway Coast and Glens

Ballycastle: Bespoke

Ballymoney Museum: Attraction / Other Visitor Building

Limavady: Attraction / Other Visitor Building

Giant's Causeway: Attraction / Other Visitor Building (Operated by National Trust)

Bushmills: Bespoke (seasonal)

Portrush: Bespoke (seasonal)

Rathlin Island Boathouse Museum: Attraction / Other Visitor Building (seasonal)

Cushendall: Bespoke (seasonal) (operated by SLA)

Mid and East Antrim

Ballymena Braid and Arts Cultural Centre: Council

Carrickfergus Castle: Attraction / Other Visitor Building

The Gobbins: Attraction / Other Visitor Building

Glenarm: Bespoke (operated via SLA)

Larne The Book Nook: Attraction / Other Visitor Building: The Book Nook (operated by SLA)

Lisburn and Castlereagh

Lisburn Linen Centre and Museum: Attraction / Other Visitor Building

Hillsborough Forest: Attraction / Other Visitor Building (seasonal)

Armagh, Banbridge, Craigavon

Banbridge FE McWilliam Gallery: Attraction / Other Visitor Building

Armagh County Museum: Attraction / Other Visitor Building

Ards and North Down

Bangor: Bespoke

Newtownards: Bespoke

Portaferry Exploris: Attraction / Other Visitor Building (operated by SLA)

Groomsport: Attraction / Other Visitor Building (seasonal)

Newry Mourne and Down

Downpatrick St Patricks Centre: Attraction / Other Visitor Building (operated via SLA)

Kilkeel Nautilus Centre: Attraction (Operated outside of council control)

Newcastle: Bespoke

Newry Baginbally Castle: Attraction / Other Visitor Building (operated via SLA)

Fermanagh and Omagh

Enniskillen Castle: Attraction / Other Visitor Building

Omagh Strule Arts Centre: Attraction / Other Visitor Building

Mid Ulster

Bellaghy Seamus Heaney HomePlace: Attraction / Other Visitor Building

Cookstown Burnavon Arts & Cultural Centre: Attraction / Other Visitor Building

Dungannon Hill of the O'Neill: Attraction / Other Visitor Building

Magherafelt: Council

Derry and Strabane

Visit Derry: Bespoke: (operated by Visit Derry)

Strabane Alley Theatre: Attraction / Other Visitor Building

Looking across the border at our Republic of Ireland counterparts, Fáilte Ireland operate 25 Tourist Information Centres (TIC's), which is the current status following a rationalising process which commenced in 2016, with a further number of TICs reduced to seasonal operations taking place recently in 2022. Additionally, they license a number of TICs which are subsequently operated by partners. As a result, these TICs have varying levels of operation and support as outlined below.

Tier 1: 25 TICs, of which 10 operate year-round and 15 seasonally, June through September.

Of the seasonal TICs, 4 are operated on Fáilte Ireland's behalf via an SLA.

Tier 2: 35 Community Tourist Offices (CTO's), which are licensed by Fáilte Ireland and operated locally. To qualify as a CTO, one must be first and foremost a dedicated visitor servicing or information operation.

Tier 3: 28 Visitor Information Points. These are information points located in visitor attractions, community centres, retail outlets, local pubs amongst others, which can vary quite widely in the quality of provision, with some very basic information services and others in effect providing a more enhanced service than Tier 2 CTOs. Due to these wide gaps in service provisions, these arrangements will be further reviewed with an anticipated rationalisation as a result.

Due to nature of how Fáilte Ireland operate and fund these Visitor Information services, it would not be fair to compare NI exactly to this tiered process, but learnings can be drawn.

Looking at the most recent tiered level for Visitor Information as outlined in the 2016 draft review:

1 - Prime VICs: located at major attractions and gateways

2 - Visitor Info Hubs: delivered by Local Authorities in towns or cities

3 - Online Information and Social Media

4 - Local Community Info Centres: popular town and village tourism destinations

5 - Local Information Points: Information provision at accommodation, restaurant, bars and local businesses

The NI version is clearly wider in the scope of information provision, including digital and social as part of these tiers, not just physical centres or points, with ultimately more levels of tiering. A more streamlined approach could be adopted, previously NI operated off 3 tiers as below:

1 – Gateway

2 – Destination, which can include seasonal VICs.

3 – Local

This will be discussed in greater detail later.

2.2 Visitor Information Online Platforms

It was referenced in the 2016 mid-point review, that Northern Ireland was over-crowded in terms of destination websites. Adding to this sense of clutter were these individual platforms built and presented in disparate unrelated styles and content. Reaching over these was the discovernorthernireland.com (DNI) platform, often curating and replicating information and content published by councils and DMO's. Inspired by this situation, in February 2020, DNI re-launched on the Simpleview web platform and destination management system (DMS). This brought about a shared DMS, which any council or DMO could onboard to allow sharing of product listings between DNI and their website to connect to each other. This brought efficiencies in operations, with a singular product listing able to be published across both platforms, and potentially also to Ireland.com, operated by Tourism Ireland, via an API feed. Additionally, to the benefit of the consumer and visitor, such connected web platforms were presented on the same content management system (CMS) and therefore can be delivered in the same style and brand identity, providing a unified and seamless stream of information provision digitally.

Whilst this arrangement may suggest that repetition is prevalent across these platforms, the primary function and aim is to provide consistency of information and content, whilst ensuring the individual roles of each platform are fulfilled, as below:

Council/DMO platforms: All relevant tourism and economic generation activity, including those attractive and appealing to local residents.

Discovernorthernireland.com: Products, experiences and events which will deliver travel across regions and counties of NI, and from further afield, in particular Republic of Ireland.

Ireland.com: Promoting travel from international and GB audiences.

Currently 8 council/DMO partners have onboarded to the shared DMS:

Ards and North Down

Causeway Coast and Glens

Derry and Strabane (via Visit Derry)

Fermanagh and Omagh (via Fermanagh Lakelands Tourism)

Lisburn and Castlereagh

Mid and East Antrim

Mid Ulster

Newry and Mourne

To date, this shared DMS approach has been deemed a great success, both in efficiencies operationally, evoking a shared visual identity born from the "Embrace A Giant Spirit" brand and embedding the principle of collaboration at the heart of visitor information digitally.

The remaining 3 council areas: Antrim and Newtownabbey, Armagh Banbridge and Craigavon, Belfast (Visit Belfast), currently retain their own web platforms, with no shared DMS access, but they have access to upload product listings remotely.

The current contract for the provision of these DMS and CMS services expires in February 2025, which will provoke a natural full review of these arrangements contractually which may bring amendments to the current service provision and mode of operation.

The role of social media is secondary within the Visitor Information landscape. Its role is primarily as a marketing tool, providing consumer inspiration, interrupting their social media feeds. It though can of course provide and point to information as a supporting measure, but due to the nature of feeds and posts this can render such information hard to find, potentially buried beneath more recent posts. Also, the question of which social media platforms should be used can be a complex one. Therefore, a tourism destination web platform does present as a more sustainable and user-friendly approach to housing and surfacing visitor information and should be the primary digital platform.

3. CURRENT SITUATION ANALYSIS

3.1 The role of information

Information helps us to understand the world around us, it is both an enricher of experience as well as a functional means to an end.

Travel by its very nature takes us out of our routine, our rituals and sometimes even our comfort zone. So, information is the fuel that empowers experiences and makes them both possible and more enjoyable. However, the manner in which information is delivered can enhance or undermine the emotional experience overall. Information can be surmised into two macro types of information:

Enhancing: Any information that augments an experience beyond its practical or rational elements and enriches it: e.g. storytelling, participation, immersion, live interpretation

Facilitating: Any information that facilitates the experience in a practical way and makes it easier to focus on the experience itself, e.g. way finding, operational.

The customer's decision making 'journey' is less linear, more complex and iterative, as the ability to access and share detailed content increases. The established tourism model of Dream, Select, Plan, Book, Visit, Recollect and Recommend remains a very useful concept for planning information provision; but in practice, it is not so simple. For example, the Booking and Selecting stages can be concurrent, and planning can be undertaken in destination (the visit stage) for example.

Therefore, the role of information should be fluid and ubiquitous, fulfilling the needs and motivations of the visitor whether in market or at trip planning stage.

3.2 The role of VIC's and models of operation of Visitor Information provision

There is no denying that visitor information offices have been impacted by digitisation. Yet, as illustrated by Destinet; representing destination and regional tourism management in Germany, in their study on the future of tourist information; "Future.TI 2020", those who believe this puts VIC's at a disadvantage because of this are incorrect. In Tourist Information Offices (TIO's), visitors'

analogue and digital realities meld into one and can stand for an effective synergy of real-life and digital communication with visitors.

This is echoed through the NI Visitor Information Network, where a survey conducted across VIC operations amongst all councils, Visit Derry, Visit Belfast and National Trust in November 2023 ranked the VIC itself as the most important individual platform for providing visitor information. This is due to a combination of factors such as providing independent, trusted, expert advice. The same is also true from the 2022 UK TIC survey with 94% listing in person advice or recommendations as the key reason for visiting, the highest ranked answer.

Beyond this independent expertise, VIC's deliver a human touch with local knowledge, commonly answering questions such as "where would YOU choose to eat"? For those visitors who have already undertaken research, this local knowledge and expertise provides a platform for reassurance and validation to visitors, giving them confidence for their onward experiences or journey. VIC advisors may ultimately have the underlying aim of elongating stays, experiences and spend, but they transcend sales staff and provide a powerful ambassadorial "Giant Welcome" to their local area, aligned to the "Big-Hearted" brand pillar of Tourism NI's Embrace A Giant Spirit brand, reflecting the generosity and warmth of welcome to Northern Ireland, and by its people.

There remains a question and conflicting views though surrounding where ideally VIC's should best be located. Consensus exists that civic and council buildings are not ideally suitable. Ultimately such a move re-purposes existing buildings and are not designed to best serve visitors or meet their behaviour, movements, or demand.

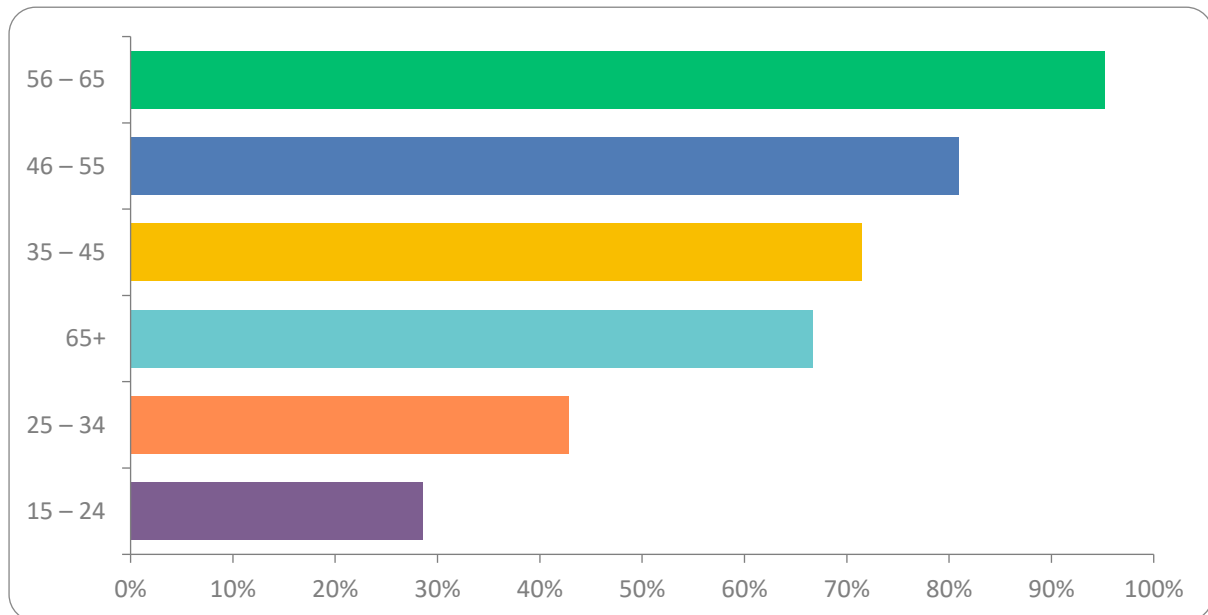
Preference for a dedicated VIC itself remains, but realism over budgets must prevail. Appropriate dual function VIC's should be sought and explored for the benefit of the visitor and an economically sustainable approach to delivering in person Visitor Information. The example of Carrickfergus Castle Visitor Information Centre is just one where such a dual purpose at Carrickfergus Castle has delivered benefits immeasurably. Serving visitors, boosting footfall and providing a successful and sustainable operation. Without such a move the Carrickfergus VIC would likely have closed. The converse is also true, Lausanne in Switzerland's experience of their VIC moving out of the train station due to construction work ongoing, just 132 metres away within 1-2 minutes walking distance of the train station has seen a drop of 43% in footfall, with much less spontaneous visitors despite a new bright, dynamic environment and much improved facilities. Looking at the positive though, ultimately this does bring an increased quality of welcome to visitors. In effect delivering quality over quantity.

Being mindful of footfall though is important. Unrestricted access does not always work for both parties. The example of the Giant's Causeway Visitor Centre is pertinent where at times of high footfall and visitor congestion, the provision of visitor information and visitor servicing meeting customer expectations can be challenging. In such situation visitors are directed to the Bushmills VIC, to best manage visitor footfall and a clear example of operations working in effective collaboration, in this example National Trust and Causeway Coast and Glens Council.

Success and footfall though are not the only barometer of economic sustainability and longevity. Liverpool Tourism Information Centre has recently enjoyed one of its best seasons in 2023, leading the visitor welcome for Eurovision and were subsequently nominated for Eurovision Experience of the Year for the Liverpool City Region Tourism Awards 2024. This also resulted in requests for similar to be provided to Labour Party conference delegates and for Grand National 2024. Additionally, they enjoyed their most successful cruise season in revenue generation. Yet, a threat of closure remains over their future. Located within Liverpool One Shopping and Entertainment complex, notice to their operations was served in November 2022, to which an extension has been granted. The TIC is now examining their future operating model and seeking opportunities for the private sector to contribute to the running of the TIC.

In Northern Ireland, looking at VIC footfall and enquiries there are reasons to be positive with 60% of Visitor Information Network reporting an uplift in enquiries in 2023, year on year. This is supported by statistics in Belfast, with VIC's operated by Visit Belfast up 28% on enquiries between April – September 2023, year on year. Specifically, the summer period of July – September recorded at 13% YoY uplift on physical enquiries at the Belfast Welcome Centre.

It is clear demand for VICs remains strong, but delving into this more, who is the demand from and for what purposes? The NI VIC survey clearly illustrates that VIC services are typically sought out by a 35+ audience, with those aged 56-65 the most frequent Visitor Information service user. Whilst being an “older” profiled audience, the below chart illustrates a broad-spectrum age range, and represents a strong basis, and a stereotypically higher spending audience.



This is also supported by research in other destinations, including the wider UK TIC survey which indicated that visitors are typically over 40 years old, with those aged 50-59 the biggest cohort. This is further supported by research in Germany, where it appears VIC visitors exhibit characteristics of a premium target group in many respects, not only is the proportion of guests with a higher income greater, but its research also demonstrates that those who find out more than average about the experiences on offer will ultimately be more active and open to different activities, thereby spending more time and money on tourism related activities. For this same reason, 81% of the NI VIC network typically see a VIC visitor of high economic value.

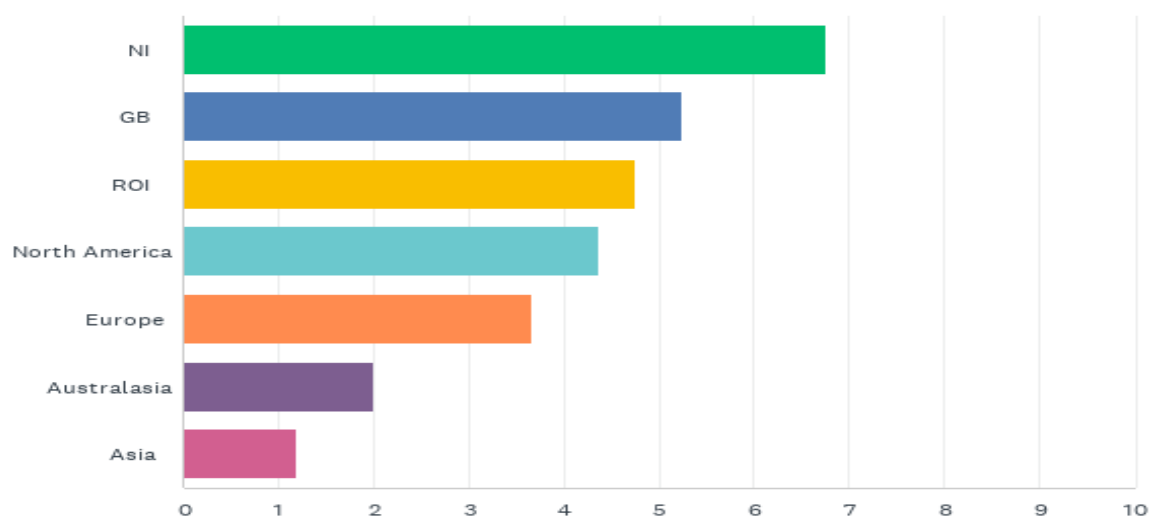
Attempting to specifically appeal to younger audiences could well be a target to grow visitors and income, but the investment to do so to attempt to change prevailing audience behaviour will be a high one. We shall discuss the use of technology later, but potentially investing in this arena to chase such a new audience, arguably does not represent a sustainable approach economically, with technology regularly advancing at a high rate of pace, and platforms of choice potentially falling quickly out of vogue whether be by virtue of declining credibility, or simply loss of favour for a “new platform”.

Furthermore, experiences in both NI and Germany clearly suggest that visitors to VIC's have specifically sought one out, therefore are delivering the fulfilment of an opportunity, in sales parlance they represented “low hanging fruit”. In digital marketing terms, months and years of data gathering or data purchasing can be invested to convert such “low hanging fruit” into web visitors or online purchase conversions. With 68% of NI VICs directly providing activity and attraction ticketing services, alongside the information and inspiration provision, the opportunity here is clear. This is echoed by Germany where consumer expectations of paid services indicate

where TIOs could tap in to earning potential. Tickets, visitor passes, tours and activities offered by the TIOs, travel tickets as well as tickets for events and souvenirs are indispensable for many visitors and indeed 100% of the NI VIC survey stated visitors expect retail offerings at a VIC.

This experience has been echoed in Great Britain, with many expanding on this principle through levying charges for printed information, with several TICs encouraging the sale of information leaflets as an additional way to generate income. Doncaster TIC provides maps for free but sell leaflets and guides and York TIC's adopting the same principle but opposite approach by providing leaflets for free, but they sell large A3 maps for a £1 charge.

Considering where VIC visitors are typically coming from, referring to the NI VIC Survey, domestic NI visitors appear to be the most frequent visitors to VICs. This clearly points to the domestic day tripper and staycation still being prevalent in 2023, and pointing to the role VICs can play in delivering a sustainable tourism industry and promoting repeat custom amongst the local market.



This is also an approach taken by Bologna, to promote tourism as socially sustainable with inclusivity of the local community in tourism operations is a priority for Bologna TICs. These figures also somewhat reflect the experience of the UK TIC Network, with the majority of TIC's reporting that over 50% of their visitors are local residents.

These figures though reflect the overall position across the board covering all VICs, in each of the NI and UK survey. Looking specifically at the Visit Belfast Welcome Centre it points to a very different picture with NI visitors only making up 9% of visitors in 2023 from April – September 2023 period, and North America being the biggest proportion at 30%, followed by GB at 25%. These results are somewhat skewed with out of state visitors more likely to participate in the Welcome Centre survey, but clearly each VIC can tell its own story, which points to the wide cross section of visitors they service. Further to this, with 36% of all in person visitor queries at the Welcome Centre across the April – September 2023 period, being enquiries beyond Belfast, "Gateway Enquiries", the role they play is one of promotion of the regional dispersal of visitors across NI. The current position, and potential of VICs delivering an inclusive and sustainable tourism market is clear to see.

Despite such positivity prevalent across the board by VICs in the visitor service and tourism industry benefit they bring; public spending and budget pressures will continue to put their role in focus as illustrated by Liverpool and recent TIC closures in England, such as Chesterfield and Eden Vally Cumbria.

This though has been put into sharper focus by a recent announcement in March 2024 by Visit Scotland that their network of 25 Visitor Information Centres (known as iCentres) will close over the next two years, operate as usual until the end of September 2024, after which will begin a phased programme of closures between then and the end of March 2026. This is aligned to Visit Scotland's digital-first strategy and will subsequently focus resources on targeting digital channels to influence visitors at the planning stage before they leave home, with the aim to inspire and influence where they go, when they come and what they do.

The financial pressures of the public sector, including tourism operations, are clear to see. Therefore, demonstrating effectiveness, footfall figures, ticket, and revenue figures by VIC's will be vital going forward to evidence this value outside of anecdotal visitor feedback. Footfall counters are one method of delivering this but can be difficult to source and commonly used CCTV versions are often cited as inaccurate. But emerging tech, such as artificial intelligence (AI), can mitigate these discrepancies. One such example is in GB is Winchester TIC who use such an AI overhead footfall counter with camera and find this to be very accurate. A higher investment level though is required to avail of this technology, but the benefit and validation this can bring in evidencing the VIC service, should be very much considered.

In addition to this data led measurement approach, VICs and local authorities are encouraged to actively extend their reach of visitor information provision by establishing additional visitor information points in their locale. This could be in partnership with the private sector, for example in popular restaurants, bars, or visitor attractions. Alternatively, it could be via free standing information devices, such as digital kiosks as utilised by Visit Belfast in visitor congregation points, or a less technical method as used by Fáilte Ireland through their Self-Service Kiosks located in high footfall visitor locations, which display printed literature and a map of the local area with highlighted attractions and activities, alongside a promotional visitor information video.



Outside of VIC's putting their best foot forward to showcase their effectiveness via evidence and data, are there additional methods where the potential benefits of VICs can be leveraged by consumers? Looking at the NI VIC survey, the belief amongst the network regarding reasons why VIC's or Visitor Information services are not used as much as they could be was overwhelmingly believed to be a lack of awareness of the full offering and value which VICs can provide, with 81% believing this. This suggests that potentially a public awareness campaign through PR, social media and possibly wider advertising could be beneficial and challenge this barrier and preconception. An initial test campaign could potentially be rolled out in the local NI market, which an appropriate evaluation process to establish impact and any attitudinal changes or responses.

3.3 Branding and visual appearance of VIC

From the VIC survey, we can see there is a general satisfaction in the quality of visual design, branding and condition of the VIC's, with no one ranking these below average. Albeit 50% believe the visual design and branding is merely average so there appears to be definite scope for enhancement here. Tourism NI developed VIC brand guidelines in line with Embrace a Giant Spirit, in early 2022, but to date have been limited in ability to offer assistance or support in the roll out of these guidelines. This was addressed in Q1 2024 with collateral and branded material provided to VIC's, but maintaining and reviewing this approach to best examine cost effective, sustainable approaches in assisting VICs to best deliver these assets in line with these principles would be highly recommended.

Previously, TNI have assisted VICs and local authorities in the provision of uniforms. Such initiatives pre-dated the EAGS brand, so there could be scope to re-visit this in line with the new brand identity. As a general trend though with uniform and dress codes loosening which has been exacerbated by the onset of COVID, lockdowns and working from home trends, high levels of investment would not be recommended, and would not meet expectations or demands of visitors. Just like the VIC's though, a greater consistency in approach would be recommended, therefore, branded polo shirts, and an alternative long sleeve or over layer option would be welcomed should VICs and local authorities be willing and happy to use such an approach. Additionally, accompanying branded accessories, such as lanyards would also be welcomed.

3.4 The role of digital platforms

As we live in an increasingly digitised society with the use of the internet ubiquitous and integrated into many facets of everyday life, more than nine in ten (92%) UK adults use the internet at home or elsewhere. Accessing information, education, entertainment and social connections can all occur online, reflecting the ever-blurring nature of 'life' and 'life online'. Itemising the UK nations, of note Northern Ireland has the highest rate of internet usage at home and have the lowest rate of those defined as "narrow internet users" (Ofcom, 2023).

This was reflected in the NI VIC survey in which websites were ranked as the 2nd most important visitor information service, behind VICs. The context of the best role of these web platforms must be understood though. Looking at the discovernorthernireland.com statistics, we can see that web traffic is not growing, but declining since 2021. This is not necessarily a surprise in the context of the wider market and consumer behaviour, with increasing noise and clutter across the web and social media increasingly an aggregator of information and content. Attracting attention and traffic has never been as difficult. Dwell time though is increasing, standing at 2 minutes 25 seconds in 23/24, rising from 1 minute 13 seconds in 22/23 and 1 minute 4 seconds in 21/22. Referring to Visit Britain evaluation metrics, they consider a visit of 1 minute + as a "quality visit", therefore DNI is over indexing in performance here. This may be a reflection on content within DNI itself, but it does point to a quality over quantity approach in delivering information on digital platforms. As a priority the best quality and curated information should be presented, making the best use of the opportunity and potential conversion to those who have visited as opposed to

directing resources and energy into gaining traffic. Easy to digest, discoverable information and inspiration should be prioritised over volume of visits. With the objective of continuing to maintain and build on the dwell time of visitors, thereby increasing the likelihood of engagement, interest and converting from a web visitor to a physical visitor.

This is not to say that web platforms should not be used as a database of information and products. This is a perfectly valid and appropriate use, especially in the absence of detailed guidebooks or brochures. A ubiquitous housing of products remains an important trade and industry service, acting as a voice and one stop shop for all tourism offerings. Such an approach is being transitioned away from by other National Tourism Organisations such as Visit Britain, Visit England and Visit Scotland, and is currently being reviewed by Visit Wales, but with a smaller geography and tourism industry in comparison to these national entities, and whilst seeking to assist providers without a clear digital product footprint, this remains an important role of visitor information across Northern Ireland. Priority though should remain on inspiration, and presentation of information, which aligns to both Visit Scotland's and Visit Britain's approach.

Whilst delivering this content and database approach, it is important to not simply just replicate existing information and services. As described previously the local tourism authority, Tourism Northern Ireland and Tourism Ireland platforms all serve different purposes and audiences so replication here is minimised. The same should be approached in content and the serving of this. For example, Tourism NI has been exploring the concept of developing a mobile app, or a mobile map-based app. Whilst certainly a practical and beneficial development, ultimately it was deemed no more than "somewhat beneficial" with the same, or similar, information and services already available from map apps, such as Google Maps, and of course DNI.

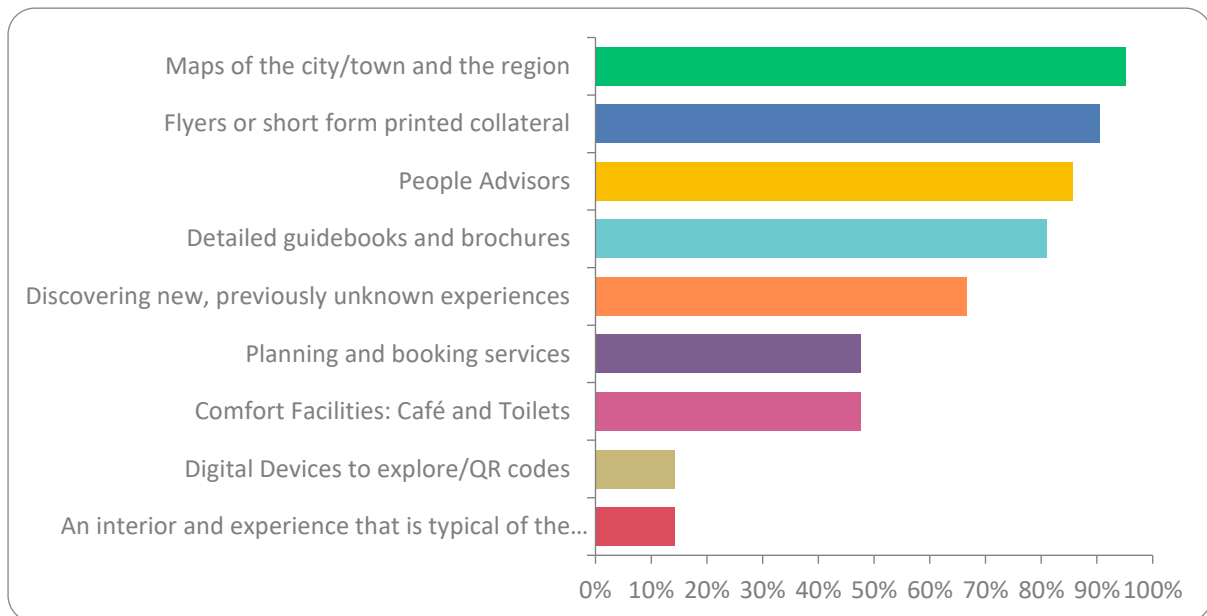
Whilst the role of in person VICs and digital platforms are distinct in their own manner, they should complement each other in the information and services they each provide. Not least from the experiences in Germany who concluded that those which visit a TIO also use digital channels in part much more frequently than those who do not visit a TIO, for example various apps, the destination's own website and Google Maps. Therefore, understanding and delivering a clear role and expectation of each channel will bring benefits in the visitor experience itself and the resulting impact. Such TIO visitors are clearly engaged heavily in the destination and present a huge opportunity. Therefore, the view in Germany is that the TIO is the central place to combine various information with various communication channels on a specific location. The TIO must position itself: on the one hand, by maximising the emotional and inspirational attraction of personal contact, and on the other hand by steering and choreographing the digital outreach programme.

Looking further into the role which web platforms can provide in servicing visitors and complementing VIC's, acting as a retail shop is commonly a role or consideration. Albeit through a limited sample base, but long term this does not represent a successful or sustainable venture in a digital sense. Both Visit Derry and Visit Belfast have stated great successes in store, within the VIC, but this is not translated into digital success. For Visit Derry, Derry Girls merchandise remains in demand online, with this product's clear global reach and demand, but this is not consistent across all online sales products. Recruiting for or allocating dedicated resource for online store management is also required as a further investment to maximise results and customer service.

A similar position is also echoed in GB, with both Lincoln and Winchester TIC's reporting positive in centre sales results yet Visit North Lincolnshire's experience of online retail is one of difficulty in managing effectively aligned to a low volume in sales. Furthermore, their experience in relation to product sales point to the most popular being those which are mostly attached to an event or season and 'expire' when this season or event passes.

3.5 The role of literature

Looking at the NI VIC survey, it is clear that printed literature plays a very important role in delivering the expectations of visitors. Maps of the city/town/region ranked as the highest expectation, followed by flyers/short form collateral, with detailed brochures/guidebooks ranked 4th.



The same is apparent from further afield, with the UK network reporting that collecting literature is the 2nd highest reason to visit a TIC and results from German surveys point to that for the visitors, it is the basics of a TIC that are of primary importance, including literature stands with brochures and flyers, maps of the city/town and the region.

Looking at statistical evidence from Tourism NI across 23/24, the NI Visitor Information Guide Map was distributed at a volume of just over 60,000 copies to meet visitor and VIC demand, and approximately 20,000 printed items in total were collected by rail passengers travelling from Dublin to Belfast from the TNI managed Connolly Rail Station leaflet stands.

This also reflects experiences of Fáilte Ireland who continue to invest heavily in producing 13 regional map guides, in 5 languages, and 24 town and city maps, as well as an Ireland map. The example of Causeway Coast and Glens, Mid and East Antrim and Derry and Strabane Councils in producing a Causeway Coastal Route Map could be considered as a blueprint to develop additional regional map guides in a collaborative spirit to increase the promotion of regional dispersal to visitors.

The demand for literature as a basic and primary information service is clear, the challenge is how this demand is met sustainably.

One such approach in GB is that of Visit North Lincolnshire, with their local authority having determined a “no print zone”. This precipitated the need to identify what brochures and print material is truly required. Walking and cycling guides have been in huge demand, for which a small charge has been levied, approximately £1, rendering them profitable as well. They are also available online in pdf format. Such an approach both meeting demand and in turn profitability will be further investigated with an aspiration for similar approaches to be rolled out to other local TIC's.

Similar sustainable approaches have been adopted by other destinations such as Bologna, where maps are printed on demand only, as opposed to being freely available, and in Riga where QR codes are provided for city guides only, with no printed versions available.

Lausanne perhaps adopts the most interesting and interactive approach, where guide maps are handed back in various allotted locations around the city, with attractions and trade made aware of this to help support the carbon footprint objective of the initiative. They also in fact encourage visitors to make notes on the maps and these are passed onto new visitors who are encouraged to do the same, leveraging word of mouth and peer to peer recommendations, most commonly delivered digitally, in a more analogue model.

Another initiative adopted by Lausanne is where leaflets are laminated, such those in exhibitions where are then easily handed back are re-used sustainably. If a visitor wishes to take one away, they can request a paper copy on return.

3.6 The role of technology

The role of technology and new devices in delivering visitor information is a very interesting debate. On one hand these new technologies can in themselves be a visitor attraction whilst presenting the VIC and the tourism region as a cutting-edge dynamic destination. Augmented reality (AR) and virtual reality (VR) are becoming frequently used tools for immersive travel experiences, allowing individuals to virtually explore destinations before making a commitment. Furthermore, VR and AR experiences could deliver greater accessibility to all, providing a taster, or close to similar, experience for those with accessibility needs who typically may have greater difficulty in enjoying experiences physically. Obviously though they would not cater across the full scope of accessibility needs, such as visual impairment. We must also be mindful, that tourism, and Tourism NI is a human experience brand, one that should be enjoyed in the physical present, aligned to the “Big Hearted” experience brand pillar.

Looking at the VIC survey, technology and devices regularly ranked poorly, with digital information devices only deemed a key service delivery expectation by 14% within the VIC survey. Looking at VR and AR devices specifically, these were most commonly deemed “somewhat beneficial” and only 35% deeming them a key service to meet visitor expectations.

This also reflects the view in Germany, where demand for digital elements at VIC's were far down a list of expectations, for example interactive touchscreens, films on screens and other digital experiences all well behind to desire for a personal point of contact at a counter.

But this is not the universal experience, Visit Derry VIC has had great success and engagement from VR headsets and has an objective to develop more content in line with this. Further afield, since opening in 2018, Albany Visitor Centre in Australia has become an attraction in its own right due to its free, three-minute VR experience, where visitors can experience parts of the region they can't access any other way – such as swimming with great white sharks. Additionally, they embed the local community within this process, partnering with local universities' VR research teams to help create the content. So, it is not a one size fits all.



Additionally, there is strong anecdotal reporting that such devices and tech prove great engaging successes at conferences and trade shows, providing a visual experience taster of the tourism offering, beyond that which a brochure, for example, could not provide.

Of all the tech devices, Information Kiosks were ranked the highest within the NI VIC Survey in terms of the value and demand they present to visitors to VICs. Despite that, evidence suggests that kiosks are best utilised when the content is optimised for this regard. Accurate data is not available covering the TNI Information Kiosks, but linked to this kiosk functionality is an itinerary planner which shows that only 0.09% of all page DNI.com views are in relation to viewing a bespoke user build itinerary, at just under 5,500 page views a year. This includes the itinerary planner hosted within DNI as well as 13 Kiosk locations. This points to a requirement to review the current functionality and enable accurate usage tracking to establish a true picture. But reflecting on usage levels of Visit Belfast kiosks screens, recently refreshed from both a hardware and software viewpoint, based on available information provided, they have on average been used 1,389 times in the Welcome Centre between April – September 2023. This compares to 187,039 walk in visits during the same period, therefore the kiosks are used by under 1% of all visitors. This also compares unfavourably to the demand for printed material, with approximately 2,000 printed NI tourism information items picked up by consumers from Connolly Rail Station, on a single month basis.

It is clear that staff and people are key and the most important service and investment at any VIC. This reflects the experience of Lausanne, who do not have any digital screens and focus on the people first approach. This would appear to be the unanimous conclusion, VICs should focus primarily on the physical, with information digitally as a backup, as an alternative during times of congestion, or an engaging novelty. The key is balancing the correct investment and how could these digital information and tech initiatives be delivered affordably? One potential suggestion is avoiding the use of hardware to minimise costs and ensure that such platforms are available and optimised to run on smartphones, for which VIC visitors can be pointed to. This may even increase usage by potentially increasing accessibility via the familiarisation of their personal device. This echoes the experience in Germany where the recommendation is that the emotional and inspirational attraction of personal contact should be aligned by steering and choreographing a digital outreach programme, in particular by directly linking into the visitor's smartphone.

4. LOOKING FORWARD

4.1 Strategic Overview

Looking forward, the role of visitor information remains paramount within the visitor experience journey and within the destination marketing mix. As we move towards an increasingly digitised society it could be easy to believe the traditional VIC as part of this mix is increasingly irrelevant, as is reflected in the digital first strategy of Visit Scotland. This though is not the case, and Visitor Information and tourism providers must be careful of eroding or contradicting the core basis of their purpose, in how they operate, which is to encourage and promote the enjoyment and personal enrichment of physically experiencing a destination. But the perceived traditional role of the VIC though may no longer have validity. Now it can also be a catalyst for change in developing partnerships with the local community, business and partners, and used as a vehicle to drive tourism and change, a lot more than just providing information.

Using the experiences of Germany again, there is a growing requirement of TIOs to inspire visitors, with much existing unexploited potential, which could be promoted above all else by addressing visitors in a more emotional way through storytelling and new forms of presentation. The prerequisite here is to start viewing TIOs as more than just offering functional services.

What is clear, is that in the past, VIC's were essentially a place where you could book a room and ask questions, whereas nowadays they are multifunctional service centres where digital and analogue services are interconnected and where ever evolving visitor trends and expectations have to be satisfied. Visitors expect a broad spectrum of free services from a VIC as standard and as new service options and offers increase, so, too, do visitors' expectations. This is, however, by no means a disadvantage of the VIC, rather it can be a blueprint for its enduring success. Looking again at Germany, they have identified 5 competencies to be delivered by TIOs:

- Visitor and service competency
- Brand and product competency
- Selling competency
- Storytelling competency
- Digital competency

They add, these competencies must be implemented using a modern service and space concept appropriate to the destination with corresponding media technology and mediation as well as optimised processes.

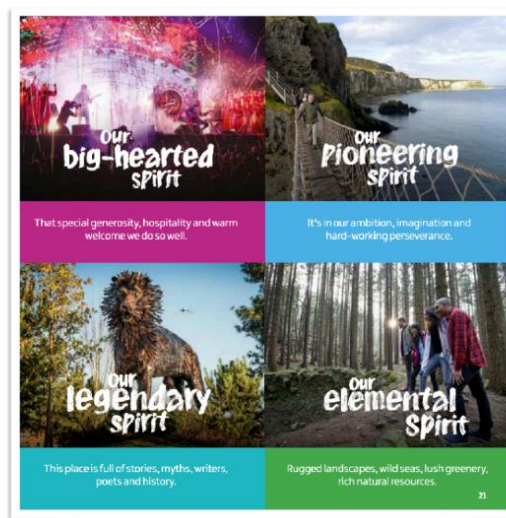
Reflecting on the Constellation Model, as presented by David Peacock from Simpleview, on the topic of "The Future of Tourism" at the City DNA Expert Meeting in November 2023, one such suggestion is of a destination and VIC examining and applying, or creating, their own unique DNA, reflecting the essence of the destination or people, which can be reflected and applied throughout the VIC.

Compelling examples include Vancouver Island positioning itself as a social enterprise, striving to ensure that tourism and travel is a force for good across businesses, communities, culture and the environment, prioritising sustainability, authenticity, and social responsibility. Similarly, Queenstown in New Zealand and its pledge to be carbon zero by 2030 will see the tourism industry focus on decarbonisation, promoting biodiversity, and becoming a world leader in green tourism, as well as supporting the community's social and cultural life.

Creating a destination or VIC DNA though does not have to be so ambitious, or daunting. An existing example embedding a destination DNA into the physical VIC is an Oak Tree exhibit within Visit Derry VIC, inspired by the Irish translation of "Derry", which is taken from the word "Doire" which means oak wood. This helps embed the character of the place and its DNA within the VIC, physically and emotionally. Bringing uniformity and consistency to this process and behaviour can be applied by using the existing EAGS brand characteristics to provide this as illustrated below.

Every VI touchpoint should be imbued with a 'human touch.'
Personal, personalised, authentic, engaging and helpful.

Grounded in stories. Content that brings people deeper into our key stories in a way that enriches their understanding and enjoyment.



Our can-do attitude IS expressed in how and where we connect with our visitors. Content and formats that are surprising, progressive, fresh, intuitive, modern & multi-platform.

Helping our visitors to feel they truly belong in our landscape. Equipping them with the knowledge and perspective to navigate it with ease and experience it from the best point of view.

This existing framework can act as the inspiration to provide and evoke a unique DNA and subsequently visitor experience via VICs and visitor information.

All this feeds into and helps promote the increasing global trend of the rise of slow travel and experiential tourism, which emphasises a deeper connection with local communities. Travellers are opting for longer stays, immersing themselves in the day-to-day life of their chosen destination. This shift fosters cultural understanding in turn also promotes sustainable tourism practices and provides economic benefits to local communities.

Taking all this on board, and understanding the services that are currently delivered, and looking to the future, one of greatest barriers to re-framing and helping to unlock the potential and enhancing the perception of VICs and visitor information could be the name itself, "Information". This suggests possibly a transactional service, one which reflects the service that once was delivered, but not necessarily currently, and not one which looks to future visitor expectations. Repositioning VICs, or rebranding them, could point to a more enticing prospect.

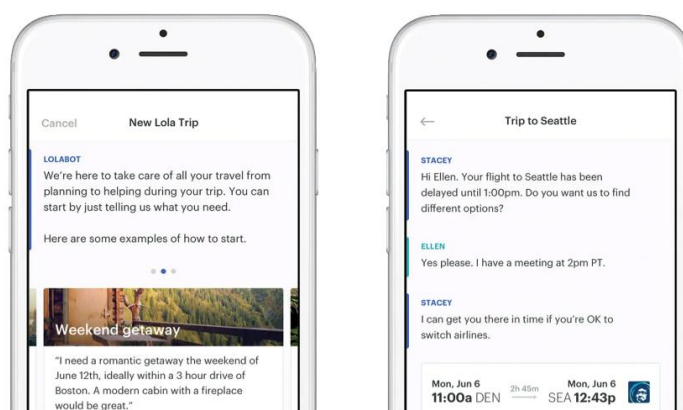
There is somewhat precedence for such a move, close to home with Fáilte Ireland recognising this shift and defining their equivalent services as delivered by the "Visitor Engagement" team, as opposed to "Visitor Information".

4.2 Innovative and Future Technology

Looking to innovative uses of technology, advanced artificial intelligence, can be used to enhance personalised travel recommendations, making every journey tailor-made for the individual preferences of the traveller, or simply a seamless, hassle-free visitor experience.

This hassle-free solution is perfectly demonstrated by "Lola", which aims to revolutionise the concept of travel agents by making trip booking as easy as texting a friend. The company, which was started by Kayak founder Paul English, with a small team of travel bookers, will rely on super-powered AI algorithms that will help them manage as many as hundreds of clients at once.

Here's how it works: after setting up an account—and providing credit card details—Lola users can simply message a representative through the app, whether they need a simple round trip to Chicago or want to plan a weeklong hiking expedition through Indonesia. While a traditional booking or information site would make you type in dates, preferences, and countless other parameters, Lola promises to simplify the process by letting users make requests in conversational language: You might type "need a flight to O'Hare next weekend" instead of punching info into little boxes. This clearly points to the AI potentially having the ability to make information truly instant, intuitive and inspirational.



Another example demonstrating the extent and ambition to which this can provide an enhanced visitor experience is that of the Illinois Holocaust Museum & Education Centre, where AI was used to create a more emotional visitor experience. Here, the world's first permanent 3D interactive hologram exhibition uses voice-activated AI and hologram technology to enable holograms of holocaust survivors to answer visitors' questions directly. The effect is profoundly moving. High-definition holographic interview recordings paired with voice recognition technology enables Survivors to tell their deeply moving personal stories and respond to questions from the audience, inviting visitors to have a personalised, one-on-one 'conversation.'



Live Chat has been adopted by Visit Belfast to instantly help potential and incoming visitors via the Tawk platform. Travel advisors answer all Tawk enquiries personally, providing instant 1 to 1 advice virtually, with around 100 enquiries per month. Barriers though do exist and understandably so. During busy periods in the VIC, it can be difficult to respond straightaway and this facility is only available during opening hours, albeit 7 days a week. In the absence of this, an enquiry form is made available along with a notification that the service is offline. Generally, most enquiries are singular in nature and only require one reply, but occasionally some queries require more research, so this is followed up once ready via email.

There is no substitute for the personal touch but in this era of instant gratification, AI technology could be used to bridge these operational gaps. In particular, there has already been widespread adoption for the purposes of powering chatbots on social media platforms, as well as instant messaging apps. Used in this way, AI can respond to questions and provide valuable information to customers, even when a customer service rep is not available. Customers demand faster and faster response times on online platforms, and artificial intelligence allows businesses to deliver times that would be impossible for humans.

One such example is that of Vienna Airport, who have launched an AI chatbot service, named "Bebot". The solution is targeted to business travellers and is available on mobile or desktop to all users of Vienna AirportCity's on-site Wi-Fi or the widget installed on the website with the aim of providing information on facilities and directions to ensure a seamless, easy and enjoyable visit.

Could this also be used in a VIC setting, where digital distribution of information could be powered by AI? Such as staff providing tailored digital information to visitors, curated by AI, based on personal interests, which would then be shared digitally in a preferred format, thereby

significantly reducing the need for visitors to walk away with printed collateral and more efficiently serve their inspiration and information needs.

This all points to the role future technology, in particular AI, can innovatively play in truly elevating the information gathering process and visitor experience. These advancements should be keenly monitored and investigated with a view to adopting those which truly impact positive on the visitor, or in delivering visitor servicing operations, which can be implemented in an economically sustainable manner.

4.3 Accessibility and Sustainability

Both accessibility and sustainability have been referenced prior to this point, due to the increasing prevalence they are playing across the tourism industry. They though are increasingly in danger of becoming undefinable “buzz words” in tourism parlance, with confusion abound from the industry as what each actually means. This is evident in the recent experience of Visit Britain and their self-certification Accessibility Guides, whereby Visit Britain provided the information and guidance surrounding accessibility offering, allowing industry to subsequently produce an Accessibility Guide, with assistance from Visit Britain. This self-designation process was fraught with irregularities and mis-categorisation, but not necessarily through any malicious motivation, merely confusion and lack of true understanding. The was similar to findings in relation to the presence of online accessibility listings as patchy and inconsistent. Resultantly this process is being re-imagined, led by Visit England with an ambition to bring together a consistent approach across UK and Ireland. In 2023 a new Accessibility Toolkit was subsequently launched, and an independent steering group established in 2024, involving all National Tourism Organisations across UK nations and Republic of Ireland and key accessibility stakeholders. Led by Access and Inclusion UK to best understand how to enhance the provision of accessibility information by facilitating a more consistent approach across the industry in describing key venue accessibility information when promoting tourism products via a two-tiered process:

1. Clear, consistent user-friendly accessible information database, which is filterable, covering accommodation, experiences, tours, events, food and drink.
2. Further information delivered by robust, factual, and detailed publicly available accessibility guides.

Both these information streams provide different tasks and are not envisaged to be viewed as one or the other with each tier of information delivering a unique role, one providing ease of discovery and the other providing required detailed information to enable decision making.

Tourism NI is engaged in these refreshed processes and guidance initiatives and will continue to lead and inform the NI industry as best practice surrounding these alongside ensuring that DNI details the relevant information to consumers.

Outside of this ongoing process, the source of accessible information is widely varied, such as Tourism for All, a UK based accessible travel charity has a hub of information, although has a very limited database NI based providers. Also, Euan's Guide, which is primarily based on User Generated Content and peer review.

For Tourism NI's part, they have updated and pointed to accessibility information published on AccessAble via DNI. Such published online information is freely available to the public and is the largest provider of accessibility information across the UK, with a good representation of NI based providers, of which over 150 are listed on DNI. Existing partnerships are currently in place with AccessAble on behalf for Belfast City Council and Visit Scotland, and they have been commissioned by Visit England to lead on producing new, detailed Accessibility guides, the second tier of this refreshed approach to deliver accessible information.

Great strides in the development and implementation of accessible tourism products have taken place across Northern Ireland, but information is key, and how this is surfaced and made discoverable. This is the key role which Visitor Information can play both digitally and in person,

with Visit Belfast taking steps to publish their own digital Accessibility Guide to address this need. A confident and consistent approach across the board to segmenting, categorising, and presenting this information though will be a huge benefit. Not only is this a vital service provision but brings with it the potential to grow the tourism industry from a new, to date unrealised audience, with research from Wheel the World suggesting there is huge tourism revenue potential of £500 billion globally, with the market currently representing £77 billion across the world.

A similar position is that of sustainability and green credentials, with the industry increasingly aligning itself with environmentally conscious practices meeting visitor demands of increasingly seeking destinations and services that prioritise conservation efforts, encouraging responsible tourism that leaves a positive impact on the planet. What does it in fact truly mean? Many view it holistically as much beyond merely environmental concerns but incorporating social, economic, equity, diversity, and inclusion, as well as the distribution of the benefits and proceeds of tourism and its contribution to civic life. This is certainly the view of the United Nations World Tourism Organisation who detail their sustainable development goals as below across 17 principles.



Looking at the NI draft tourism strategy sustainability is a key principle, listed as key target. It too adopts a wider view beyond green environmental initiatives stating tourism role is “supporting a greener and more sustainable economy”.

Similar to accessibility, there are numerous schemes and providers around green and sustainable credentials. With this in mind, Tourism NI has adopted the role of partnering with Fáilte Ireland and Tourism Ireland to develop and deliver a new “umbrella” all-island sustainability assurance programme to recognise the sustainable credentials of tourism businesses and provide visitors with trusted information using an all-island “mark”. The programme aims to support those businesses who are committed to sustainability and just starting their journeys, as well as those tourism businesses already participating in nationally and internationally recognised sustainability certification and accreditation programmes, such as Green Tourism, Sustainable Travel Ireland. It is anticipated that the All-Island Sustainable Tourism Assurance Programme will be operational by H2 2024, at which stage tourism businesses will be invited to sign up. Please note that All-Island Sustainable Tourism Assurance Programme is a working title.

Visitor information's role in this principle will be multi-faceted pointing visitors to

- sustainable accredited business via visitor enquiries
- proactively pointing visitors to sustainable accredited businesses
- consideration of and promotion of sustainable approaches for visitor dispersal
- highlighting and advocating the scheme to trade and industry.

4.4 Strategic Position of Visitor Information meeting Draft DfE Tourism Strategy

With the recent publication of the Draft Tourism Strategy by DfE, this is very timely in line with this refreshed Visitor Information Plan and the opportunity to align the plan with the strategy. On reviewing the strategy, it is clear that visitor information does and will play a significant role within the successful delivery of this 10-year vision. This is despite that "Visitor Information" is not mentioned and Tourism Information Centres referenced just once, this possibly harks back to previous point that "information" should possibly be re-named and certainly re-framed.

Referring to the below diagram illustrating drivers for growth within the tourism sector, the experiences are underpinned by Visitor Information as part of this mix:



Targeted Marketing: is delivered via visitor information, personalised, 1 to 1 marketing, the apex of all marketing and advertising ambitions.

Experience Brand, "Embrace A Giant Spirit": is and will be key to how visitor information is presented and delivered.

Digital Innovation and Enhancements are at the heart of visitor information currently from "live chat", information kiosks, VR experiences and shared DMS consumer web platform.

Enabling Regional Spread and Season Growth: is delivered through effectively enabling the discovery of information and adding value in answering visitor information enquiries.

What is required, alluded to previously is a shift in perspective of visitor information across stakeholders and the sector. To enable this, the below clearly outlines the strategic role and delivery that visitor Information can bring in realising the 10-year vision and can act as a strategic framework moving forward.

Theme		Measures & Objectives	Indicators of success
Attractive	To inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit.	Ensuring authenticity, distinct appeal through the “Big Hearted” personal service of VIC’s and visitor information, inspiring visitor discovery and enhancing the perception of Northern Ireland as a destination. Key Objectives: Personal service of information and visitor experience at the highest level, evoking the Giant Spirit brand in behaviour alongside unified visual representation.	Helping and inspiring visitors to have quality, memorable and authentic experiences, making Northern Ireland renowned as a unique and prime location providing a clear brand and reputation of having a big-hearted, pioneering, legendary and elemental spirit.
Innovative	We will build on our culture of innovation and creativity to deliver excellence and world class ideas to make our industry more competitive and sustainable.	Innovative solutions to providing visitor information and adopting digital methods where appropriate of benefit to the visitor or delivering service efficiencies. Key Objectives: Delivering new methods of working and servicing visitors, enhancing their experience.	Capitalise on new and emerging technologies to develop solutions to tourism industry challenges.
Sustainable	We will build upon Northern Ireland’s unique journey of regeneration. We will evolve our tourism ecosystem to be greener and sustain and invigorate our	Encouraging environmentally sustainable behaviour of both visitors and industry and making Northern Ireland a sustainable year-round tourist destination. Key Objectives: Advocating the Sustainability Accreditation scheme to visitors and industry.	Support a greener, more sustainable economy.

	people, our place and our natural environment.	Through information, inspiration, and advocacy of visitor discovery, improving regional dispersal and seasonal growth of the tourist offering.	
Inclusive	A tourism ecosystem that brings opportunities for all, with lasting and positive economic and societal benefits to our communities throughout all parts of Northern Ireland.	Improving and advocating regional dispersal across Northern Ireland through visitor information to develop an inclusive tourism sector across all regions of Northern Ireland whilst supporting and enhancing the local community through tourism and VIC/Visitor Information activities. Key objectives: Through community and stakeholder engagement ensuring VIC/Visitor Information acts a community hub bringing societal benefits to residents. Through information, inspiration, and advocacy of visitor discovery, improving regional dispersal and a more inclusive tourism sector across all of Northern Ireland.	Contributing to a more inclusive economy across the whole of Northern Ireland benefiting from tourism.
Collaborative	We will collaborate widely in a spirit of true partnership, nurturing a shared vision and common clarity of purpose.	Collaboration across all stakeholders, partners and industry, working together for the mutual betterment of the tourism sector and in turn society as a whole. Key Objectives: Ensuring 360 collaboration across tourism agencies, local authorities, local government and industry to share knowledge and support to deliver best possible visitor services and visitor experience.	Collaboration will be embedded within the Sector, Government, and key strategic partners to bring benefits to the whole of Northern Ireland.

Following the publication of the Draft DfE Tourism Strategy and the restoration of the NI Assembly in February 2024, the Minister for the Economy outlined his vision of the economy against four key principles. Whilst these principles apply to the whole economic sector of Northern Ireland, they reflect the role tourism can play such is its impact across the economy, and by extension the role visitor information can play, as outlined below.

Theme		Aligned DfE Draft Tourism Strategy Theme	Role of Visitor Information
Good Jobs	Creating good jobs	Attractive and Inclusive	Ensuring authenticity, distinct appeal through the “Big Hearted” personal service of VIC’s and visitor information, thereby making Northern Ireland renowned as a unique and prime location, delivering a buoyant, unique tourism environment promoting inspiring and rewarding jobs. And through information, inspiration, and advocacy of visitor discovery, improving the economic benefit of the tourism sector across all of Northern Ireland.
Regional Balance	Prioritising projects that promote regional balance, to ensure everyone, no matter where they live, should have the same opportunity to earn a living.	Inclusive and Sustainability	Through information, inspiration, and advocacy of visitor discovery, improving regional dispersal and seasonal growth of the tourist offering to develop an inclusive tourism sector across all regions of Northern Ireland whilst supporting and enhancing the local community through tourism and VIC/Visitor Information activities.
Net Zero	Reaching Net Zero by 2050	Sustainability	Encouraging environmentally sustainable behaviour of both visitors and industry and making Northern Ireland a sustainable year-round tourist destination.

Productivity	We can improve our productivity by using dual market access to grow domestic and attract highly productive investment. Investment in skills, research and development, and innovation will also drive better productivity.	Innovation and Collaboration	Collaboration across all stakeholders, partners and industry, working together for the mutual betterment of the tourism sector and in turn the productivity of society as a whole. Innovative solutions to best provide visitor information and adopting and ensuring both in person and digital services work harmoniously together for the benefit of the visitor and tourism operations, resulting in a more productive tourism economy.
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4.5 Gaps and opportunities in services and support for VICs and Visitor Information

It is recognised that the Visitor Information Network cannot move forward in isolation, support is required in offering services and improved operations. With stringent budget restrictions currently in place, across all public services, the realistic ability to supply this is somewhat tempered, but outside of this Visitor Information Plan, there are opportunities which should be explored and considered further, or when the opportunity arises, as well as recognising the ongoing support which is currently taking place.

As discussed in a number of instances a key pillar in successful visitor information is the personal service provided, particularly in person at VICs. Such a service, is ranked 2nd in the NI VIC Survey in best meeting visitor expectations, defined as "concierge service", but this is also clearly aligned strategically to TNI and the draft DfE Tourism Strategy.

A key pillar of the Embrace A Giant Spirit brand is "Our Big – Hearted Spirit", reflecting the generosity and warmth of welcome to Northern Ireland, and by its people. Visitor Information and VICs are instrumental in delivering this.

Further alignment is evident in the "Attractive" theme of the draft Tourism Strategy, defined as "To inspire and energise others through our passion, enthusiasm, pride, determination and Giant Spirit". This links directly to the service of Visitor Information and VICs.

This therefore points to a clear benefit in ensuring this "Big-Hearted" brand quality is delivered clearly and effectively by all Visitor Information touchpoints and suggests the provision of adequate training in customer service. The NI VIC survey also supports this with 75% deeming this extremely useful.

Expanding this principle further, referring to the draft Tourism Strategy, it states that the experience brand underpins the drivers for growth in NI tourism, which suggests that opportunities and the holistic delivery of this brand via Visitor Information is key to maximising impact. Therefore, understanding this, training, and tools to best deliver "Our Legendary Spirit" via visitor information through grounding information in stories, thereby enriching visitors understanding and enjoyment. This suggests that support and assistance in Storytelling would be valuable. This is also echoed by the NI VIC Survey, with 65% stating this would be extremely useful.

Such immersive story telling skills, and customer service, not only provide benefits to visitors, but also to empowering and enriching staff themselves helping galvanise recruitment and retention for the industry, aligning to Tourism NI "Make It Here" campaign initiative ongoing in phase 3 in 2024 and aligning to the "Inclusive" strategic theme.

Currently, Tourism NI is investing in developing and testing a pilot training scheme covering customer service, aligned to the "Embrace A Giant Spirit" brand, operated in conjunction with Belfast Metropolitan College. Should this pilot be successful opportunities will exist for VIC staff to avail of such an accredited course.

Outside of this, TNI support in educating and informing VIC's of the brand is vital. Such support has been provided in the 23/24 financial year alone through 4 regional experience brand roadshows, and online seminar, a recording of which is available on tourismni.com. Despite this, ongoing review of support and engagement should be provided.

Beyond evoking the characteristics of the experience brand, on a more basic level is the physical branding itself. Reflecting this, in 21/22 VIC brand guidelines for VICs was produced, but budget pressures have prevented these from being effectively utilised. Small steps to address this position has taken place Q1 2024 and this position should be continued and enhanced moving forward.

In the online environment, the physical brand identity has been supported through the connected DMS, where the 8 connected councils/DMO's reflect the experience brand via their tourism web platforms. Outside of this, Antrim and Newtownabbey Borough Council have taken

significant steps in reflecting the experience via their own tourism brand and on their online platform.

Accessibility and Sustainability has also been discussed within this document and it is recommended that ongoing support and guidance is provided in regard to this to the Visitor Information Network. As both of these initiatives are in their infancy this will be reviewed ongoing.

Previously TNI had provided a Mystery Shopper Quality Assurance Scheme on behalf of VICs, to monitor and evaluate performance and customer service level of VICs. Such a scheme has been disbanded due to budget constraints. Whilst undoubtedly beneficial, as this document has discussed, due to ongoing budget pressures, it would be highly unlikely that such a scheme would be reinstated. Further to this, a Visitor Satisfaction Survey as provided by TNI complied via the Survey Monkey platform and accessible via a web link is available to all VICs, which allows for ongoing tracking of service at no additional cost.

Also, previously TNI had provided a contribution to the Visitor Information Network uniform as agreed by the VIC Uniform Committee. With staffing and roles changing significantly in recent years, no such Uniform Committee remains. Although aligned to the physical VIC Embrace A Giant Spirit branding aspirations, low level support should be offered in this regard in relation to branded Polo tops, badges and lanyards. As dress codes increasingly become less formal and that the behest of either individual employees or organisations, Tourism NI should adapt to this approach reflecting wider society and exercising best use of public funds in providing a consumer centric service.

4.6 Visitor Information tiering system

Feedback from the NI VIC survey was clear in the view that tiering Visitor Information/VICs was deemed to be required and the 5 tiering roles identified in 2016 draft visitor information plan should be reviewed.

In conducting this exercise attention was paid to the role Visitor Information and VICs play within the tourism mix, the core purpose of this tiering; for local authorities to confidently understand the level of required support and referring to the Fáilte Ireland categorisation.

Whilst using Fáilte Ireland as a basis is useful and prudent, there is no direct correlation between both NI and ROI VIC operations, so nuances at a minimum must be applied. The clear and simple categorisation by Fáilte Ireland is an interesting and possibly refreshing approach delivering the result of avoiding needless complication, grey areas or ambiguity.

Despite Fáilte Ireland either fully operating TICs, or funding or supporting them, and TNI not having a direct operational control over NI VICs, with all operated by or supervised by local authorities or designated DMO's, there is perhaps a greater level of consistency in NI VIC operations, which renders VIC classifications not entirely simplistic.

Based on the discussion above, and echoing the feedback that such tiering was best utilised to define operations, there is no need to define digital and social platforms, they are a mandatory inclusion within the visitor information mix and do not require to be tiered.

As is demonstrated within the Tier 1 classification by Fáilte Ireland, seasonal VICs should not be rendered with any disadvantage in tiering. Simply because operational reasons or a prudent use of budget leads to seasonal operation does not necessarily reflect a lower footfall location, as is evidenced by Bushmills VIC in their support and service to Giants Causeway visitors.

Therefore, it is recommended the new classifications are as below, moving to 3 tier system, akin to Fáilte Ireland and that of 2010 Visitor Information Plan.

Destination: these are located in key visitor congregation points or are VICs housed within key tourist destinations/facilities. They service the tourism honey pots.

Quantity: 6: 16% of VICs

Visit Belfast Welcome Centre / Belfast International Airport / Belfast Cruise Hub (seasonal) / Giant's Causeway (Operated by National Trust)/ The Gobbins / Visit Derry

Regional: The largest group, comprising 60%, these provide regional connectivity for visitors across the VIC network. These will be key to delivering the Inclusive strategic theme.

Quantity: 23: 60% of VICs

Ballycastle / Ballymoney / Limavady / Bushmills (seasonal) / Portrush (seasonal) / Rathlin Island (seasonal)/ Ballymena / Carrickfergus / Lisburn / Hillsborough / Banbridge / Armagh City / Bangor / Newtownards / Downpatrick / Newcastle / Enniskillen / Omagh / Seamus Heaney HomePlace / Cookstown / Dungannon / Magherafelt / Strabane

Local: Operated by service level agreements with external partners and overseen by local authorities or are Visitor Information Points managed or hosted by staff external to Visitor Information. These continue to play a valuable role in promoting the dispersal of visitors but are also key to delivering the Collaborative strategic theme on a local community level.

Quantity: 9: 24% of VICs

Antrim Gateway Centre/ Antrim Junction / Cushendall / Glenarm / Larne/ Portaferry / Groomsport / Kilkeel / Newry

Belfast City Airport has been left off this tiering list as it is a uniquely unmanned visitor information point as things stand within the network.

Of great interest is the planned developments at Carnfunnock Country Park, due to open to the public in March 2026. The £6 Million project will include construction of a new visitor centre which will include a reception, shop space and café overlooking the coastline. The new developments will also incorporate visitor information with the aim to enhance and attract visitors to elongate their stay and experience more. A cycling facility will create an attraction for older children and investment in the existing adventure play area will promote inclusive and accessible play. Additionally, infrastructure work and a new maze viewing platform will improve accessibility throughout the site. Such investment is any exciting development and TNI welcome's the future key role Carnfunnock will play within the Visitor Information Network.

In previous iterations of tiering systems, stringent operational policies accompanied these in relation to operational hours and service provisions. Such instructions are outdated in the current climate, with VICs and local authorities having to tightly manage budgets. Ultimately every VIC should seek to deliver the best possible visitor service and act as gateway to information and inspiration, across all Northern Ireland whilst delivering expert hyper local knowledge within their locale. The strategic aims as detailed above should be echoed by all VICs, clearly delivering the tourism strategy to 2030 and delivering as many of the service outputs, as detailed below, as possible.

4.7 Recommendations for a Visitor Information Framework

The strategic position of Visitor Information has been outlined aligned to the draft Tourism Strategy and the priorities of the Department for the Economy. Peeling this away into practical deliverables and objectives are outlined in the below ambitions and expectations.

Role of VIC

Key Draft Strategy Theme Delivery: Attractive

Key DfE Vision Theme Delivery: Good Jobs

Expert: Excellent product information, confidently answering visitor queries and an ability to inspire and educate. Hyper-local knowledge surrounding the immediate locale, promoting “hidden gems”.

Inclusive: Act as a forum to encourage and facilitate regional dispersal of visitors across NI, working in collaboration with the VIC Network to fulfil knowledge and services were required.

Concierge: Ability to plan and book onward travel, tours, or experiences.

Giant Spirit: Delivering the personal “big-hearted spirit” and visual EAGS branding to physically represent this and connect VICs in the eyes and minds of visitors. TNI to provide training or guidance in relation to brand pillars and appropriate branded collateral for VIC display, alongside available options for clothing VIC staff.

Immersive: Ensuring the VIC evokes its own character and “DNA” representing the area, the location, the people, or its history. This can be distinct to the VIC or inspired by the Experience Brand characteristics of “Legendary”, “Pioneering” and “Elemental”.

Community: Ensuring the VIC serves, engages and collaborates with the local community, stakeholders, including local tourism trade. Placing VIC and tourism in the heart of local society.

Success: Investment or development in process or tools to accurately demonstrate footfall or visitor enquiry numbers is essential against a backdrop of VIC rationalisation and digital first approaches,

Consumer Identity: Reviewing and amending the terms “Visitor Information and Visitor Information Centre” to accurately reflect services provided and meet consumer expectations.

Corporate Identity: A new 3 level tiering system to be adopted and referred to as above.

Role of online visitor information

Key Draft Strategy Theme Delivery: Collaborative

Key DfE Vision Theme Delivery: Regional Balance

The presence of a consumer destination web platform is a mandatory essential and a minimum requirement in expectation from visitors. These will inform visitors prior to arriving in destination allowing them to plan, be inspired and build excitement for their journey and experience. Such platforms and indeed any online initiative, must also be mobile optimised as the key platform for web access, with 76% of all online time spent via a smartphone (Ofcom, 2023), and in destination planning and information.

DNI, as referenced previously covers all of Northern Ireland and to best manage resource and the user experience through avoiding clutter as best as possible, will focus on information and products which will encourage travel across NI, from one area to another.

Local authority tourism websites, obviously cover that local area only, but can also serve and promote local tourism to residents of the local authority with limited travel required.

Tourism NI will continue to commit to collaboration and efficiencies in the delivery and presentation of web-based information. The upcoming procurement review of this service provision in 24/25 will naturally review this current practice and process by TNI and all current 8 local authority partners.

Role of Information Kiosks

Key Draft Strategy Theme Delivery: Innovative

Key DfE Vision Theme Delivery: Regional Balance

A key technology providing information and located often within VICs. These though must not be seen as an alternative to personal advice, but should be designed to deliver an overflow, when access to personal advisors is not possible, or can be used for discovery while waiting. Additionally, they can be used in locations and areas VICs do not reach and operated as a sustainable approach to information outreach as an alternative to literature, particularly offsite to VICs, where stock levels can be difficult to monitor and manage.

Is there a method where AI can be integrated into their operation? This is to be monitored and explored.

Role of interactive technology

Key Draft Strategy Theme Delivery: Innovative

Key DfE Vision Theme Delivery: Productivity

This is an interesting debate in the role interactive tech, primarily VR material at VICs with conflicting reports and views. They though clearly have the ability to entertain and inform whilst inspiring discovery across a region. Their use and investment are encouraged, but quality, engaging content must be used, and such devices must be located where they can be easily found. Additionally, visitors should be pointed to and presented such devices by advisors, alongside explanation and narrative of locations to ensure they truly act as a discovery and sales aid, as opposed to a fleeting novelty. It must also be noted that such devices will likely require ongoing technical maintenance, or repairs, and as technology or user expectations change should be updated the best reflect this or risk impacting a negative effect and perception by visitors.

As AI technology advances and becomes increasingly available and economically viable this should be investigated and monitored on an ongoing basis, seeking to deliver innovation to the visitor information experience. This should be on the basis of potential use of visitor experiences or more intuitive, efficient delivery of operations and visitor information, with an AI powered chat bot possibly the most obvious example to keep in mind, alongside how this technology can also compliment the personal service in a VIC setting.

Role of print

Key Draft Strategy Theme Delivery: Inclusive

Key DfE Vision Theme Delivery: Regional Balance

Printed literature is clearly highly valued to visitors and VICs are keen to meet this demand. Naturally this should be realised and provided but provided in an economic and environmentally sustainable manner. Such material should provide an easily digestible guide and window to

tourism activities, negating the need for the production of lengthy of costly brochures. TNI will continue to support in the provision of a Northern Ireland wide printed visitor guide, also in multiple foreign languages. The production of additional regional map guides, such as that produced for the Causeway Coastal Route in collaboration with TNI, Causeway Coast and Glens, Mid and East Antrim and Derry and Strabane Councils should be considered and explored, with the strategic theme of collaboration to promote increased regional dispersal for the benefit of visitors and the tourism industry at the heart of such initiatives.

A sustainable visitor centric approach must also be adopted. Hosting such guides or maps online would be a mandatory requirement, but more is needed with the choice of such an initiative at the behest of the VIC or local authority, but suggestions could be:

- Printed material only provided on request and not on show, with QR codes pointing to digital copies, supported by VIC advisors advocating digital copy approach to visitors.
- Printed material is charged for, digital versions provided free.
- Return locations for re-use are placed appropriately in key locations around the council.

Sustainability

Key Draft Strategy Theme Delivery: Sustainable

Key DfE Vision Theme Delivery: Net Zero

VICs and visitor information including web platforms must provide adequate and accurate information on sustainability measures and accreditation taken by tourism providers. Clear guidance to be issued following launch of all Ireland scheme with the aim this sustainability mark will be presented and easily discoverable on all tourism web platforms.

Accessibility

Key Draft Strategy Theme Delivery: Inclusive

Key DfE Vision Theme Delivery: Productivity

Similarly, to sustainability, VICs and visitor information including web platforms must provide adequate and accurate information on accessibility measures and accreditation taken by tourism providers, reflecting an inclusive tourism market across NI. Clearer guidance to be issued from TNI following Access and Inclusion UK review. As a current measure, VICs and Visitor Information should refer to AccessAble information and point visitors in person and digitally to this freely available resource to consumers and support the discovery of any of their own local authority initiatives in this arena.

Ongoing Review

These recommendations require ongoing commitment and monitoring from all Visitor Information Network partners and Tourism NI and should be reviewed on a quarterly basis with reasonable adjustments or corrective action taken where appropriate and possible, whilst being mindful of external uncontrollable factors such as available budget.

By the end of year three of the implementation of this plan, the mid-point, an interim review will be conducted evaluating progress and outlining any necessary adjustments and reflecting any consumer, industry, market or strategic changes impacting on the plan.

Actions to be taken

Role of VIC

Delivering Attractive and Good Jobs

As referenced and discussed, is the naming convention/brand of VICs and Visitor Information an enticing prospect to consumers? Is it even an enticing prospect to industry and stakeholders? The impending closure of all iCentres in Scotland is possibly evidence of this.

Referring to the Constellation model, developed by the Barcelona / Cataluña TIC Network and the City DNA TIC Group, the 3 core pillars of a TIC are: Knowledge, Skills, Trust. Is "Information" an accurate banner for these pillars?

Reflecting on this, first party consumer research and review into the name and brand will be commissioned to best reflect consumer needs and expectations, accurately framing existing services, and inspiring a forward-looking direction.

Additionally, budget will be provided for appropriate EAGS branded collateral to assist in delivering the personal "big-hearted spirit" and visual EAGS branding to physically represent this and connect VICs in the eyes and minds of visitors.

Role of print and sustainability

Delivering Sustainability and Net Zero

The use and demand of leaflets/printed collateral from consumers is not going away. This is supported from research, feedback from VICs, and statistically we can see that every quarter, approximately, 15k NI Visitor Information Guides are distributed and 6k items are picked up from Connolly Station.

Additionally, when supplying information to visitors, a digital solution is not always possible or preferable due to non-smart phone owners, and mobile data/roaming charges to international visitors.

Therefore, a preferred solution from both a visitor and corporate viewpoint is an agreement of a sustainable leaflet approach.

Consumer research and review into the best and most appropriate solution will be commissioned, alongside a wider recommended approach to sustainability approaches which will resonate with consumers and visitors.

Once agreed this could pave the way, in collaboration with the TNI Regions and Investment Team, for the production of additional regional map guides and marketing material, such as produced for the Causeway Coastal Route in collaboration with TNI, Causeway Coast and Glens, Mid and East Antrim and Derry and Strabane Councils. At the heart of this initiative will be the strategic theme of **collaboration** to promote increased **regional dispersal** for the benefit of visitors and the tourism industry.

Accessibility

Delivering Inclusivity and Productivity

Tourism NI have participated in the UK and Ireland Accessibility Information Steering Group, led by Visit Britain/Visit England to establishing a consistent core checklist of accessibility information to be referred to by all tourism providers across the UK and Ireland. This has now concluded, alongside first party industry and market research, with approximately 30 features and criteria

agreed, which will be reviewed before finalising. This will bring not only consistency across the industry but also consistency and clarity to visitors and consumers, whilst promoting better and more confident holiday planning. Tourism NI will make available these listing features within the DNI DMS, and subsequently within the DMS of all web partner local authorities, as part of the specification within the upcoming destination web tender. A further programme of industry engagement and consumer comms will subsequently roll out across NI and in conjunction with Visit Britain.

Role of online visitor information

Delivering Regional Balance, Attractive and Collaborative

As referenced above, online visitor information will be enhanced via a consumer website contract procurement exercise in 24/25. This process will leverage improvements in functionality and user experience through dynamic content and AI. The collaborative infrastructure of shared listings with partner local authorities will be maintained across the 8 partners, with scope to expand this collaboration.