

#NISurviveReviveThrive



Naomi Waite

Director of Marketing, Tourism NI



strategic overview

Good News! openness to Explore ideas right now for a holiday in Northern Ireland is growing

37%

Now open to exploring
ideas right now for a
Holiday in NI this year.

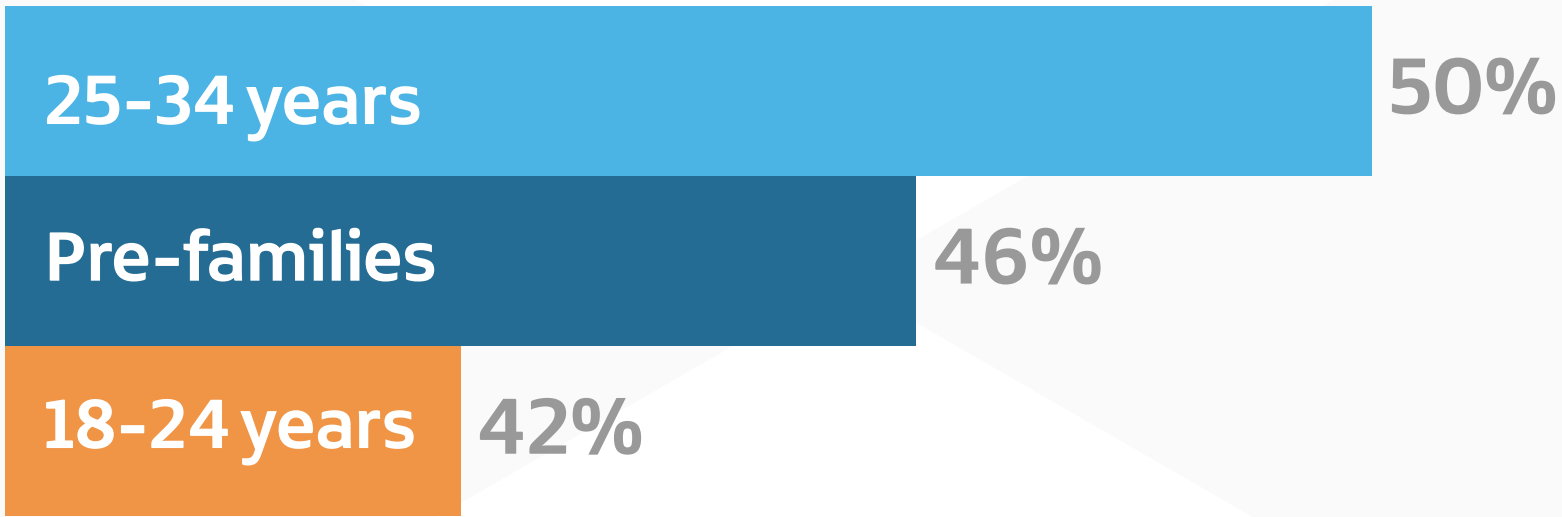
↑ UP 9%



Highest amongst younger
groups, however we have
seen a big jump amongst
Open-Minded Explorers.
TNI need to tap into their
openness.

	NI	ROI
Open to exploring for a holiday in NI right now	54%	37%
Intend to take a short break in NI	38%	9%
Intend to take a long break in NI	21%	5%

Highest amongst



Active
Maximisers
46%



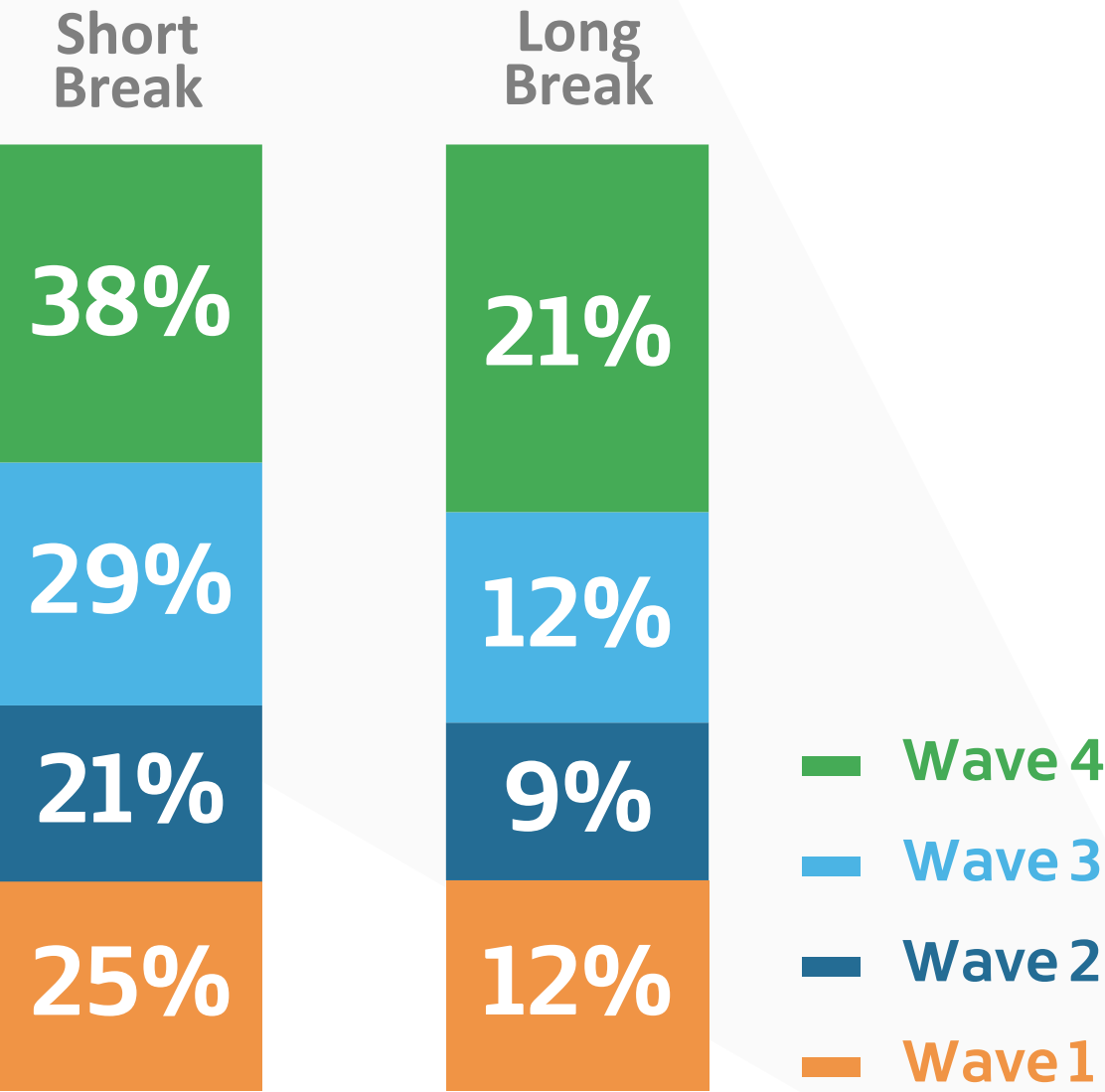
Open to
ideas
37%



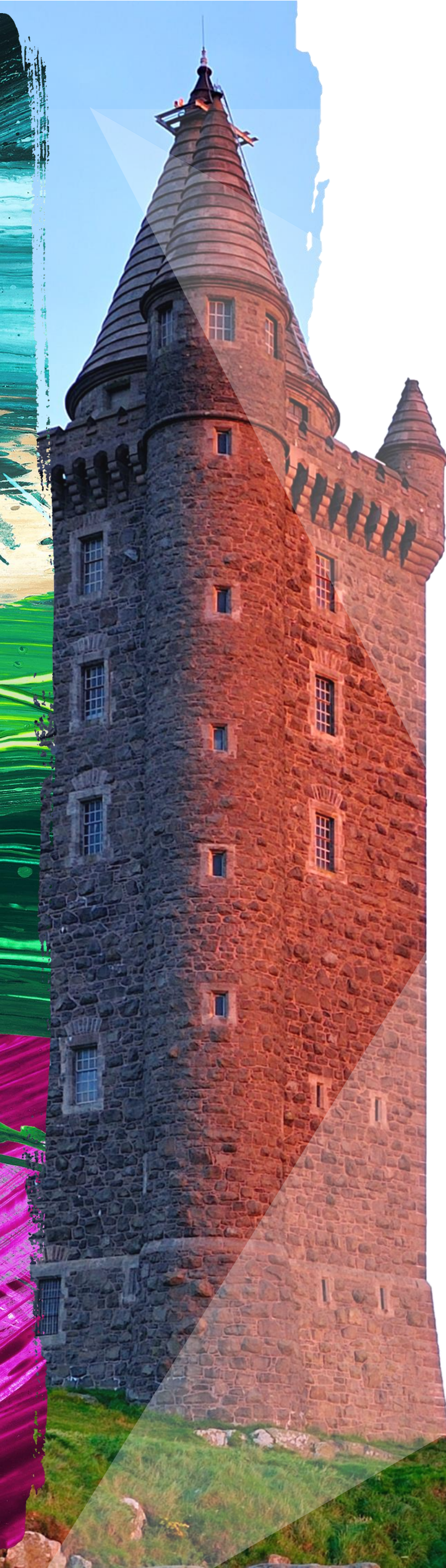
Open-Minded
Explorers
31%
↑15%

W3 36% 33% 16%

Intention in taking a break to Northern Ireland this year

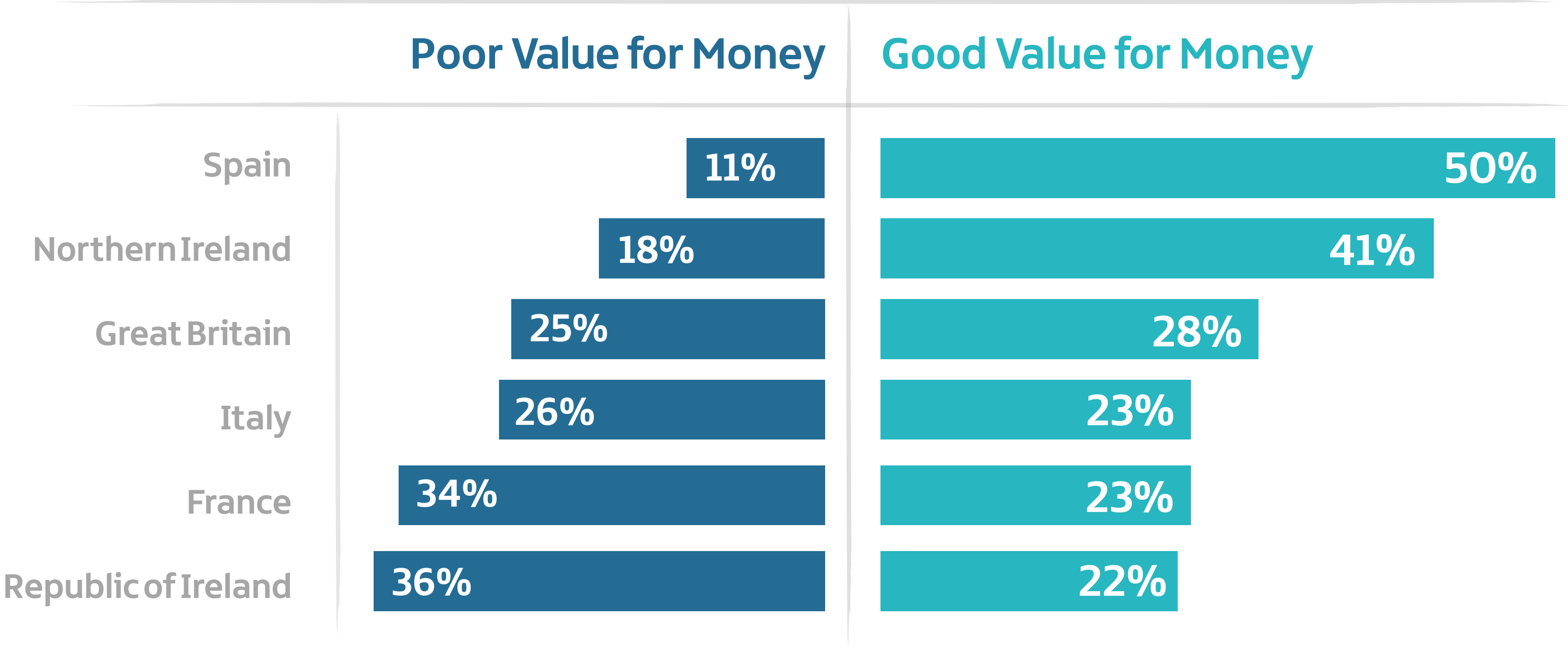


SOURCE: TNI Consumer Barometer April 2021



Perception of Value for Money in NI is relatively healthy

Value for Money





Motivations For Travel



Relax & Unwind

NI

63%

ROI

58%



Escape

54%

54%



Food & Drink

33%

33%



Fun

31%

32%



Children will enjoy

21%

16%



Bond with Family & Friends

21%

25%



Top reason for not visiting NI was **COVID-19 safety concerns.**

A pie chart divided into two segments. The larger segment on the left is magenta and contains the text '57%'. The smaller segment on the right is a darker purple and contains the text '43%'.

Of those who visited Northern Ireland since the pandemic began, **more than half** were visiting for the **first time** for leisure purposes.

☐ Yes
☐ No

Future of tourism in a post Covid world

63%

I am more likely to avoid tourism destinations where overcrowding from excessive tourism impacts negatively on local communities.

41%

I am making a conscious decision to fly less in the future due to its impact on the environment.

43%

I am more likely to choose tourism attractions/other tourism businesses with sustainable/eco-friendly credentials.

40%

Accommodation with green credentials is worth the extra expense.

40%

When I am planning holiday breaks in the future, I will consider the environmental impact of the trip.

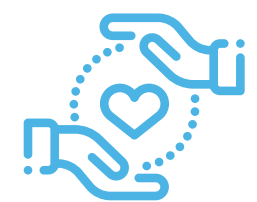
SOURCE: TNI Consumer Barometer April 2021



The challenge

As we reopen we need to **capture as strong** a share of **market and brand attention** for Northern Ireland as possible.

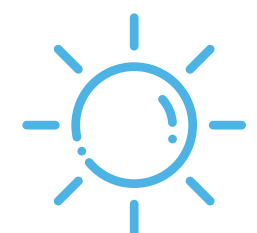
Barriers



Health and safety



Return to routine



Escape to the sun



Brexit uncertainty

How?

We need to **adopt a tailored strategy** for each market that inspires with the right messages, at the right time to the right visitor segments to **drive planning and booking**.

Drivers



Value for money



Ease & Flexibility



“Newness” or a sense of rediscovery and reconnection.



**Northern
Ireland**



**Embrace a
Giant Spirit**

A small step to a Giant Adventure

A way to
overcome the
Barriers that hold us back as
a holiday destination

= Effortless
Access

A way to
accelerate the
Drivers of acceptance of the quality
of the NI holiday experience

= **Epic fun!**



The image is a collage of various family photographs. In the top left, a man, woman, and young boy are smiling together. In the bottom left, a man is carrying a young child on his shoulders. In the bottom center, a girl with glasses and pigtails is making a peace sign. In the bottom right, a girl in a yellow jacket is smiling. In the top right, a woman and a man are looking off to the side. A large, dark brown, textured shape in the center contains the title text.

Aspiring Families



A Small Step to a Giant Adventure

HILLSBOROUGH

Plan your getaway for when you can get away.

Get inspired

Don't let Armagh's size fool you! Northern Ireland's smallest county has a huge amount to offer, from magnificent estates to planetariums, all a short drive from each other. There's just as much to do and see in neighbouring county Down, so when it's good to travel again, why not visit both! Our visitors' safety is a priority for us, so when you do decide to visit this area, you can travel with total confidence. Look out for the We're Good To Go mark on all accommodation, restaurants, bars, as well as other attractions.

While the months might be colder, a visit to Hillsborough Castle and Gardens is still a thoroughly rewarding experience. Don your wellies and take to one of the royal residence's many garden paths – and keep an eye out for its spectacular collection of seasonal flowers like Cyclamen and Narcissus while you're there.

For a truly unique experience, visit the Hillsborough Castle and Gardens. The castle is a magnificent example of 18th-century architecture, and the gardens are a beautiful mix of formal and informal. The castle is open to the public, and the gardens are a great place to take a walk or picnic. The castle is a must-visit for anyone interested in history and architecture.

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Titanic Belfast

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Peace Bridge

Derry ~ Londonderry

A Small Step to a Giant Adventure

discovernorthernireland.com #EmbraceAGiantSpirit

Northern Ireland

Embrace a Giant Spirit

Fermanagh and Tyrone

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Get inspired

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Marble Arch Caves

Co. Fermanagh

A Small Step to a Giant Adventure

discovernorthernireland.com #EmbraceAGiantSpirit

Marble Arch Caves

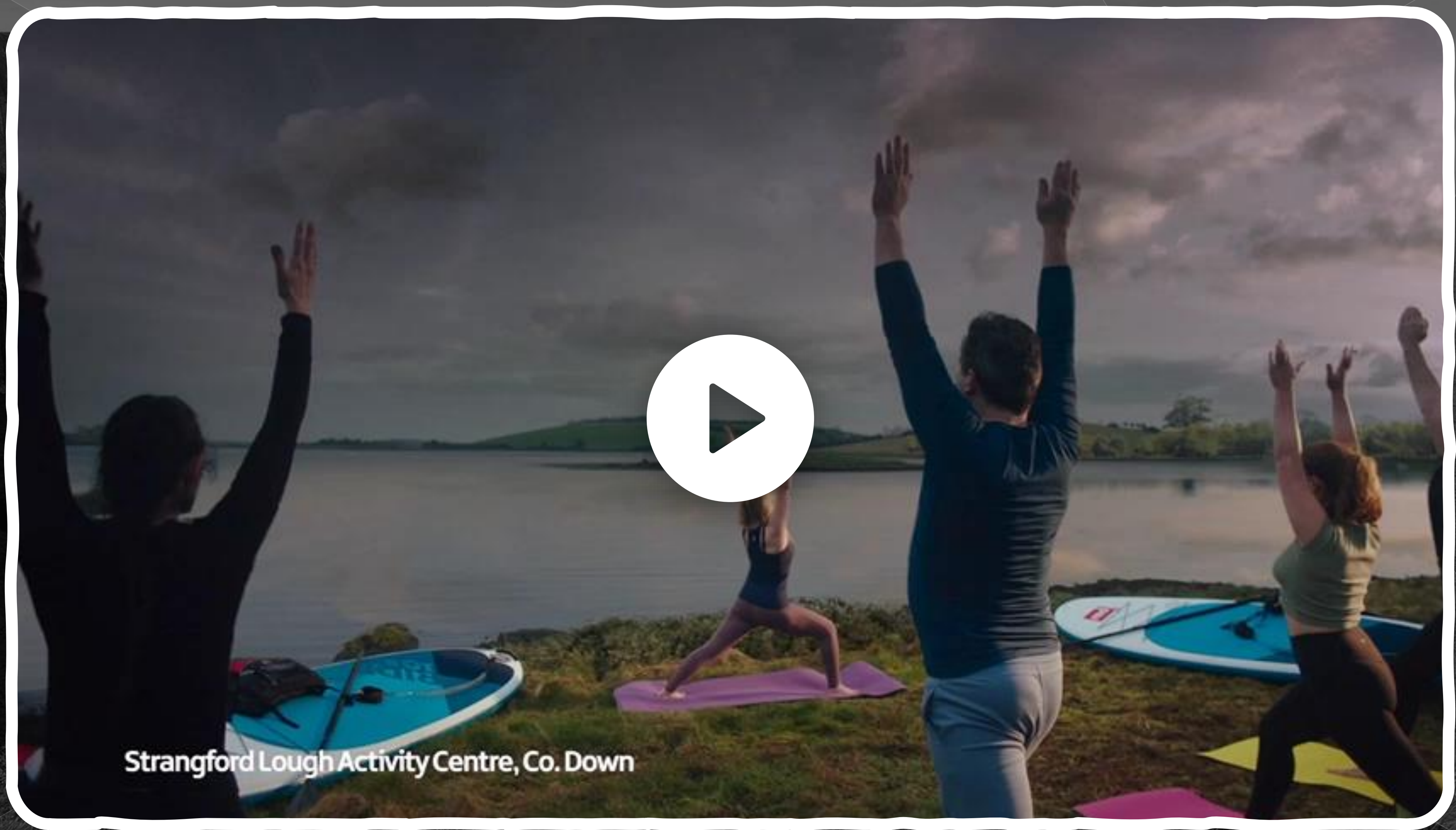
Co. Fermanagh

A Small Step to a Giant Adventure

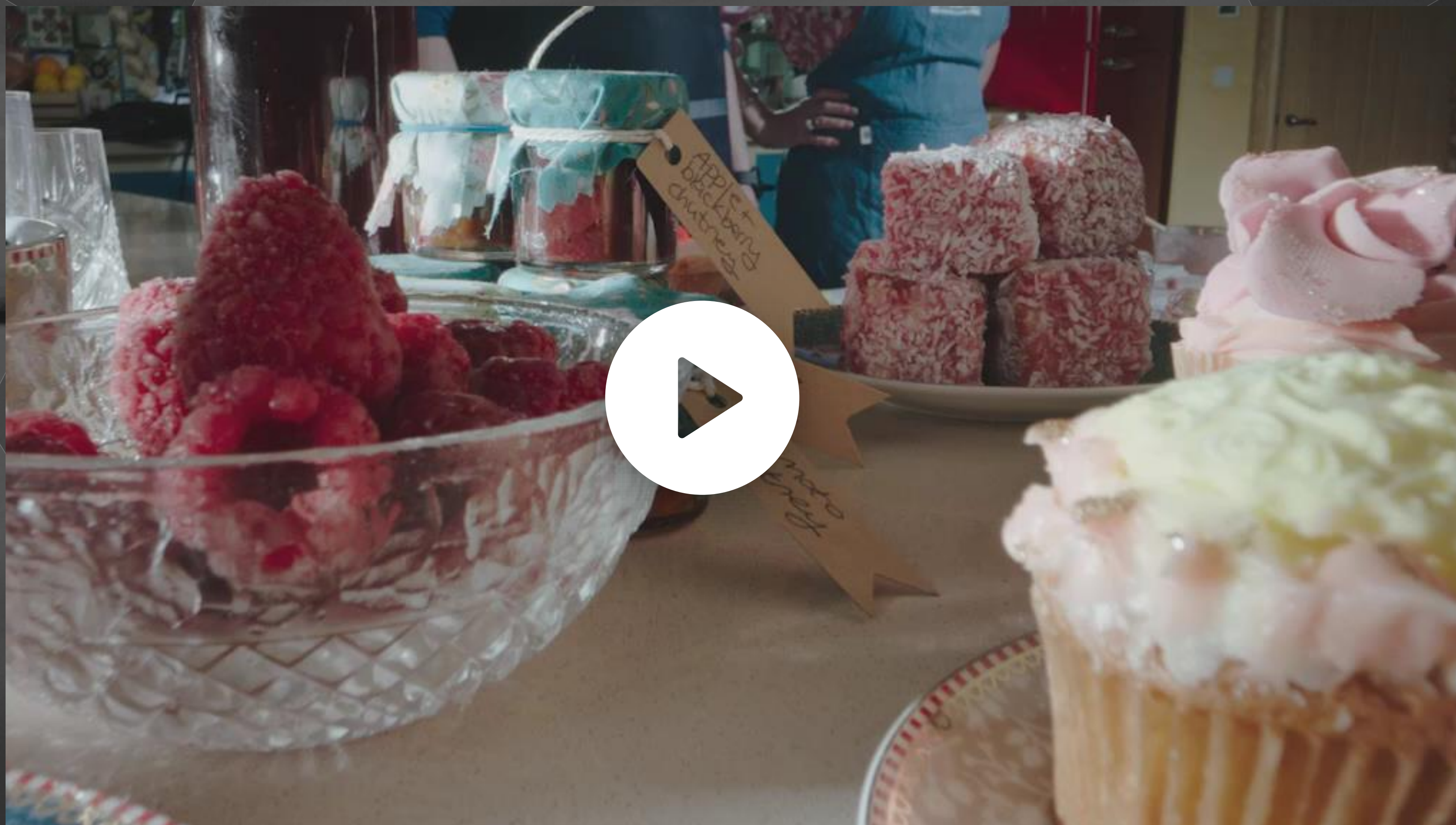
discovernorthernireland.com #EmbraceAGiantSpirit

The image is a collage of outdoor adventure photographs. The central part features a woman with long red hair, wearing a green cardigan and blue jeans, sitting on a log and smiling while holding a piece of bread. To her right, a man is sitting on a log, and a small campfire is burning. In the top right corner, a group of people are standing on a wooden walkway overlooking a body of water. In the bottom left corner, two people are riding mountain bikes on a trail. The background is a dense forest with bare trees, and a bright sun is visible in the upper left corner, creating a lens flare effect. Overlaid on the center of the image is the text "Natural quality seekers / open-minded explorers" in a white, hand-drawn, brush-stroke font.

Natural
quality
seekers /
open-minded
explorers



Strangford Lough Activity Centre, Co. Down



Unlock the Walled City and Beyond

Book your next giant adventure at discovernorthernireland.com

Unlock the Walled City
The **Unlock the Walled City** walking tour offers you a fascinating look at 400 years of stories, events, and experiences within Ireland's only completely intact walled city. Get to know the people behind the place, as you visit tour highlights such as the Tower Museum, St. Columba's Cathedral and across the Peace Bridge to the Walled City Brewery.

Cutting Edge Helicopters - Giant's Eye View
Soar above the coast and soak in majestic views from the sky. **Cutting Edge Helicopter Tours** will give you an eye for perspective on what truly means to sight-seeing.

Lough Neagh Stories - Lough Neagh Eel Fishing Experience
Lough Neagh is the largest freshwater lake in Ireland. It's also the largest wild-eel fishery in Europe. On the **Lough Neagh Stories Tour**, you can join Gary and Anna Marie, the husband and wife duo who have seen generations of stories about eel-fishing on the Lough. Learn about this Bronze Age tradition, through the very people who keep the heritage alive today.

Bakehouse NI - Digging for Gin
Join Bronagh at the Bakehouse NI for an afternoon creating your own bottle of gin, infused with delicious ingredients you've foraged fresh that day. **Digging for Gin** is perfect for small groups and guides you through the process of making Gin on as well as baking traditional Irish bread. Best of all, you take home what you make - yum!

Roe Park
Step out of the city and into the relaxing surroundings of the **Roe Park Resort**. With rooms overlooking its stunning 35-hole golf course and a luxurious spa on the grounds, you'll find it easy to unwind and pamper yourself. All the elegance of a country house estate, nestled in the gorgeous surrounds of the Roe Valley Country Park - sounds like pure bliss.

Palace St Apartments
You'll rest easy in your 5* luxury, self-catering townhouse. The **Palace Street Apartments** are situated within the old walled city, giving you doorstep access to all the comforts and excitement of a city break.

Plan your trip for when the time is right at discovernorthernireland.com

Information correct at time of print. Check with providers to ensure they're available before booking. Always follow current COVID-19 safety guidelines before planning your trip. #discovernorthernireland

Your giant guide to short breaks in Northern Ireland!

Seeking a break or a badly needed escape? Craving adventure? A giant getaway is always just around the corner - and super easy to plan. Inside we've packed in lots of ideas and great value offers to get you moving in the right direction. From short break inspiration, activities, places to stay, amazing events and more. So, open up and take a small step to a giant adventure.

discovernorthernireland.com



Where's an enchanting place for ?

Castle Coole Estate, Co. Fermanagh.

You're a small step to a giant adventure at discovernorthernireland.com

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Where's the best place to ?

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Surround yourself with breathtaking views

Book your next giant adventure at discovernorthernireland.com

Strangford Lough Activity Centre, Co. Down
Strangford Lough is a natural wonderland, offering a range of activities for all ages. From kayaking and canoeing to stand-up paddleboarding and water skiing, there's something for everyone. The centre also offers a range of land-based activities, including golf, tennis, and horse riding.

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Get lost in a natural wonderland

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Get lost in a natural wonderland

Great Value Short Breaks from £25

Hillsborough Castle
You never know who you might bump into at Hillsborough Castle & Gardens, the official residence of the Royal Family when they visit Northern Ireland. Immerse yourself in the history of this Georgian castle as you explore every nook from the Throne Room to the State Dining Room.

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Holidays worth sharing

Strangford Lough Activity Centre, Co. Down

Start your giant adventure today at discovernorthernireland.com

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Holidays worth sharing

Blessingbourne Estate, Co. Tyrone

Start your giant adventure today at discovernorthernireland.com

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Where's the best place to ?

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Holidays worth sharing

Tower Museum, Derry-Londonderry

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Holidays worth sharing

Ulster Museum, Belfast

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Social Instagrammers / Active Maximisers





Primary Audience NI **Aspiring Families**



MORNING

TV, radio and
social check in

UTV - Good Morning Britain
Cool FM - Breakfast Show - **34%**
Facebook - **73%**
Instagram - **47%**

RADIO & OUTDOOR

LUNCHTIME

Reading newspapers/sites,
browsing social and messaging.

WhatsApp (**67%**), Facebook
Messenger (**62%**) Belfast
Telegraph (**28%**), Daily Mirror
(**28%**) & Belfast Live (**26%**)

EVENING MEDIA STACKING

Watching latest dramas
and news on tv and online

60% watch UTV regularly
46% watch Channel 4 regularly
34% watch ITV2 regularly
VOD (**69%**), YouTube (66%)
Netflix (**59%**) - Browsing on Social.

OUTDOOR

Dropping kids off to school,
shopping, travel to work

Adshel - **44%**
Bus Externals - **42%**
Billboards - **37%**
Petrol Stations - **27%**

AUDIO

Radio and Spotify
at home, in-car

Cool FM - **53%**
Spotify - **48%**
Downtown Radio - **31%**
Q 102.9 / Q101.2FM
/ Q97.2 - **31%**

Unmissable TV Campaign



sky | ADSMART

**1,350
ratings**

Across **12 weeks.**
live from 3rd May

**1.2 million
impressions**

on Sky AdSmart

80%

of the **NI population** will
see the advert on
average **10 times.**

NI TV Plan 2021/22

Return to Market 2021

Aspiring Families, Natural Quality Seekers & Cities

- Mon 3rd May – Sun 13th Jun.
- 6 Week Heavyweight Campaign
- UTV, C4, Good Morning Britain
- Staggered launch of creative
- Segments modelled on Sky Adsmart using Experian data – SI edit
- Escapism content



1,200
Ratings



360,000
Imps



83.6%
1,277,400 Adults



14
Frequency

Summer Campaign 2021

AF (Schools Hols-40%) & Cities. (35%) and NQS (25%)

- Mon 14th June – Sun 29th Aug.
- 11 Weeks
- 100 ratings per week
- 'Always on' approach
- Dial up Family audience edit for the Summer Holidays



1,100
Ratings



380,000
Imps



82.5%
1,260,590 Adults



13
Frequency

Autumn Campaign 2021

NQS (50%), Cities (50%)

- Mon 13th Sept – Sun 21st November
- 10 Weeks
- 120 ratings per week
- NQS audience are most likely to take an Autumn break to higher weighting



1,200
Ratings



350,000
Imps



83.6%
1,277,400 Adults



14
Frequency

Spring Campaign 2022

Equal Rotation of edits – Market Research Dependent

- Mon 17th Jan – Sun 27th March
- 10 Weeks
- 120 ratings per week



1,200
Ratings



350,000
Imps



83.6%
1,277,400 Adults



14
Frequency

ROI Tv Plan 2021/22

Summer Campaign 2021

Active Maximisers (Sky Adsmart/Sky/VM2) (40%), Open to Ideas – City Creative (40%); OME – 20%

- Mon 21st June – Sun 29th Aug.
- 10 weeks
- 80 ratings per week plus Sky AdSmart and Sky Game Of Thrones takeover



800
Ratings



500,000
Imps Sky Adsmart

1+
coverage

82%
3,024,980 Adults

4+
coverage

56%

OTS - 11

Autumn Campaign 2021

OME (40%), AM(30%), IR-Cities (30%)

- Mon 13th Sept – Sun 21st November.
- 10 weeks
- 80 ratings per week
- OME audience are most likely to take an Autumn break - higher weighting



800
Ratings



350,000
Imps Sky Adsmart

1+
coverage

79.4%
2,925,000 Adults

4+
coverage

54.6%

OTS - 10

Spring Campaign 2022

Equal Rotation of edits- Market Research and Performance Dependent

- Mon 24th Jan – Sun 20th Mar.
- 8 weeks
- 75 ratings per week



600
Ratings



500,000
Imps Sky Adsmart

1+
coverage

77.2%
2,841,000 Adults

4+
coverage

47.4%

OTS - 8



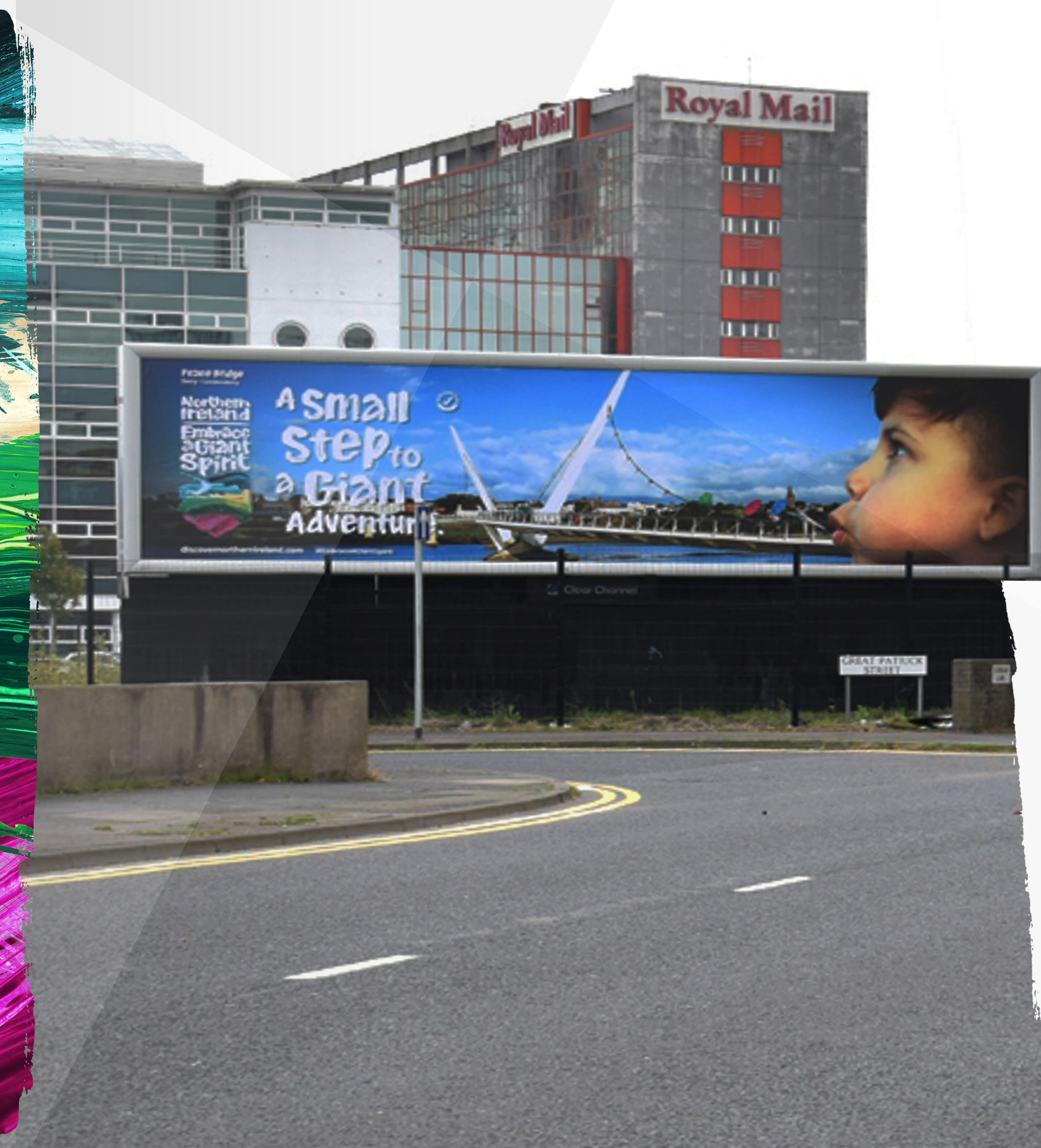
Catch up TV Un-Skippable

- 1** 76% of **BVOD** viewed on the TV set-no loss of creative impact.
- 2** 79% of **Social Instagrammers** and 69% of the **Aspiring Family** audience watched BVOD in the last week
- 3** **Love Island will be on air from end of June** - currently 880,000 registered NI users on ITV Hub. (monthly streams rose from an average of 1.2m to 4.5million when on air in 2019)
- 4** All 4 -422,000 registered users in NI and we will target by the **key interest** categories of our audiences
- 5** **Sky Go** – Euros will be on air from 11th June -11th July.

650,000

Impressions
10 weeks





“Make a
Statement”
outdoor

82% NI Population will see the
campaign - Frequency 11

Radio Much more than audio:

- Bauer network has a **weekly reach of 731,000** and Cool has a **social following of 994,000**
- **Radio partnership** across Cool, Downtown and Downtown country
- **Bespoke 'Summer of Fun' programme** of activity which **will include:**
 - 1** 30 sec 'Family Fun' travel inspiration ideas -27 different edits, creatively rotated across 12 weeks.
 - 2** Series of Presenter video diaries pushed across social Pete and Family, Melissa Riddell and Kirsty Phillips. (Facebook and Insta-stories)
 - 3** On air and social competitions for listener engagement
 - 4** Instream – 500,000 imps across their digital audio platform
 - 5** Regional outreach through Q Network

Digital Juggernauts



Press Publishers exploit their print and digital following

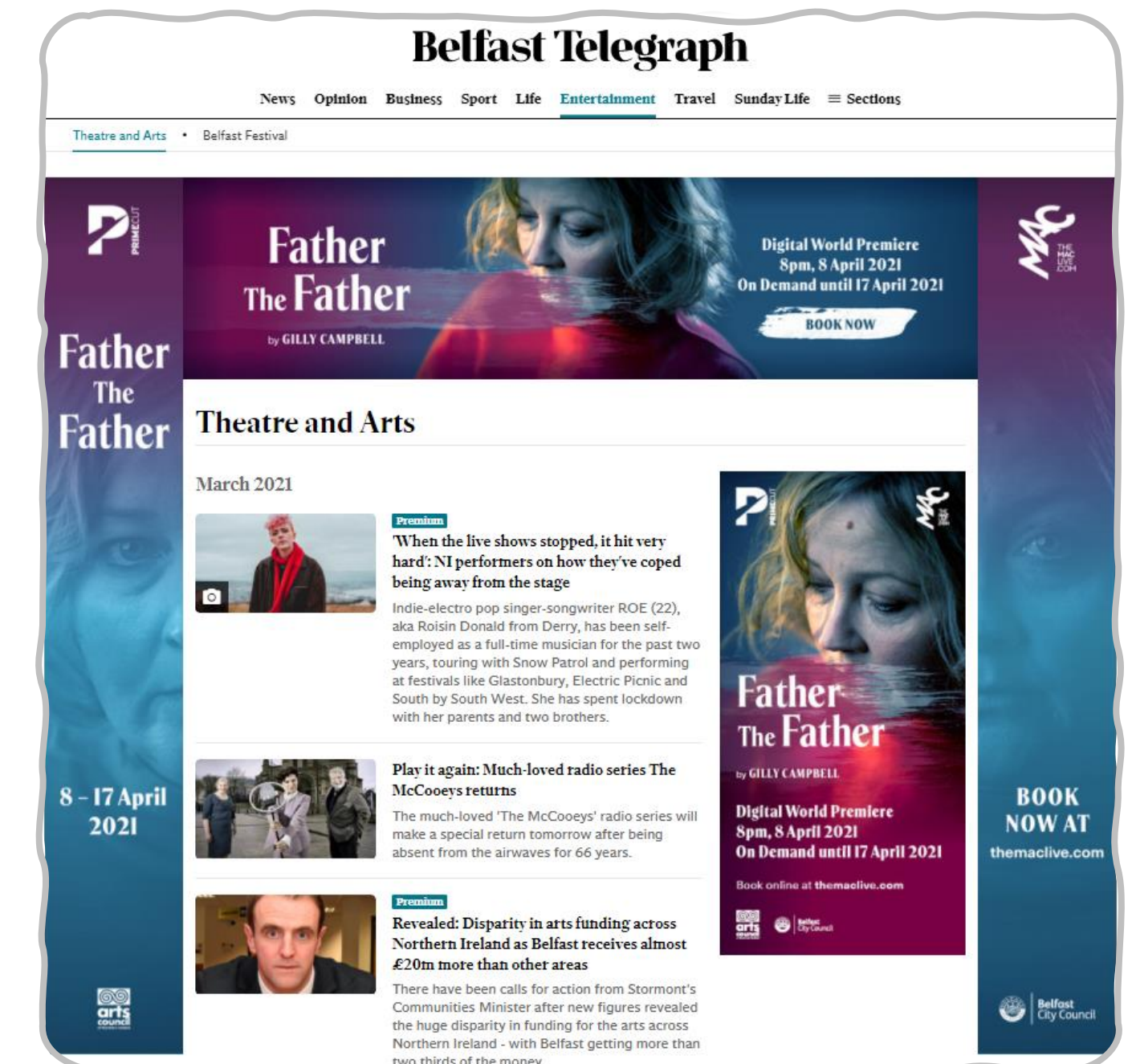
Dial up the **Hidden Gems** and
Segment Passion points



- Series of **FP Advertorials**
- **Weekend Mag** - NQS and AF audience/Daily Mirror/Irish News Weekend/Newsletter



- Live as **Native content** with digital display and social drivers

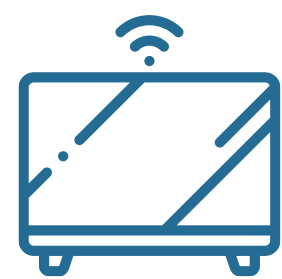


- Contextual **Takeovers**
- **Theatre and the Arts** –NQS
- **Travel TO**
- **Food and Drink** -AF



ROI Media strategy

TV and VOD in ROI



The **power of TV**
in the ROI market



Love of the outdoors,
nature and culture



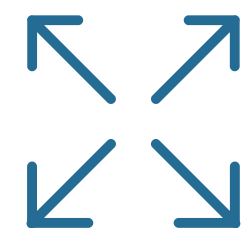
Target **Escapism**
content



Virgin Media 1
Channel Ident
Takeover for 1 week



Open Minded
Explorers



Amplify
with **VOD**

1+ **80%**
coverage Of All Adults

4+ **50%**
coverage Of All Adults





TNI Game of Thrones sky Takeover

- 1 The **most popular** programme in Sky History
- 2 Sky Atlantic is the home to **Game of Thrones** and **perfect contextual placement First in break spots** on Sky Atlantic on any viewing of Game of Thrones – currently airing every Sunday and Thursday
- 3 **All Catch up** Viewing of Game of Thrones
- 4 **Guaranteed first in break**
- 5 **66% Share of Voice** on all catch up Viewing
- 6 **3-month Ad domination**



ROI Radio

Segment Focussed
Frequency Builder

Media sponsorship

Competitions

NI Travel Show



newstalk

Partners

RTE



RTE 2FM

Digital Audio

audioXi



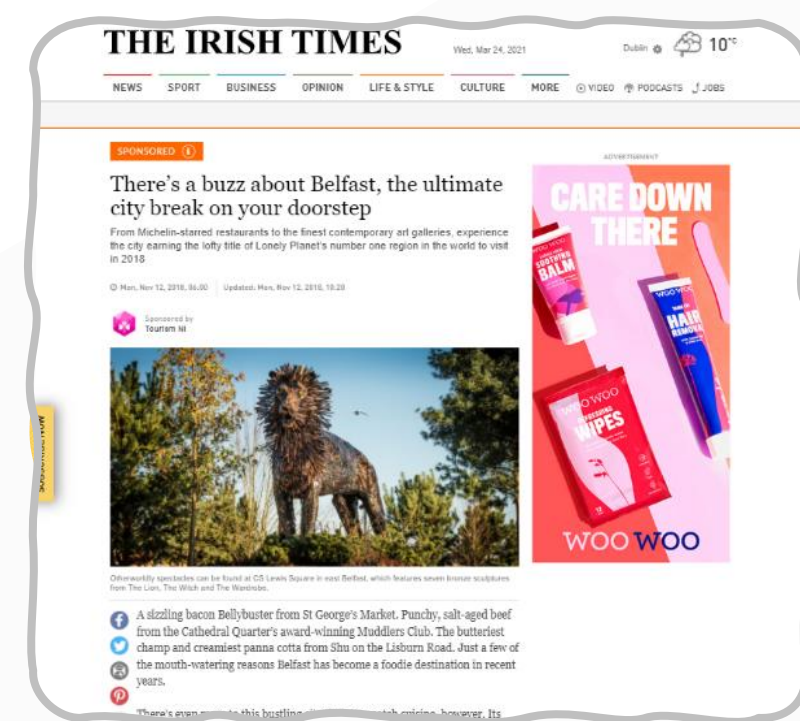
TODAY fm

Irish Times Media Partnership

6 month programme of activity in print and online. Replicated with Irish Independent Group.



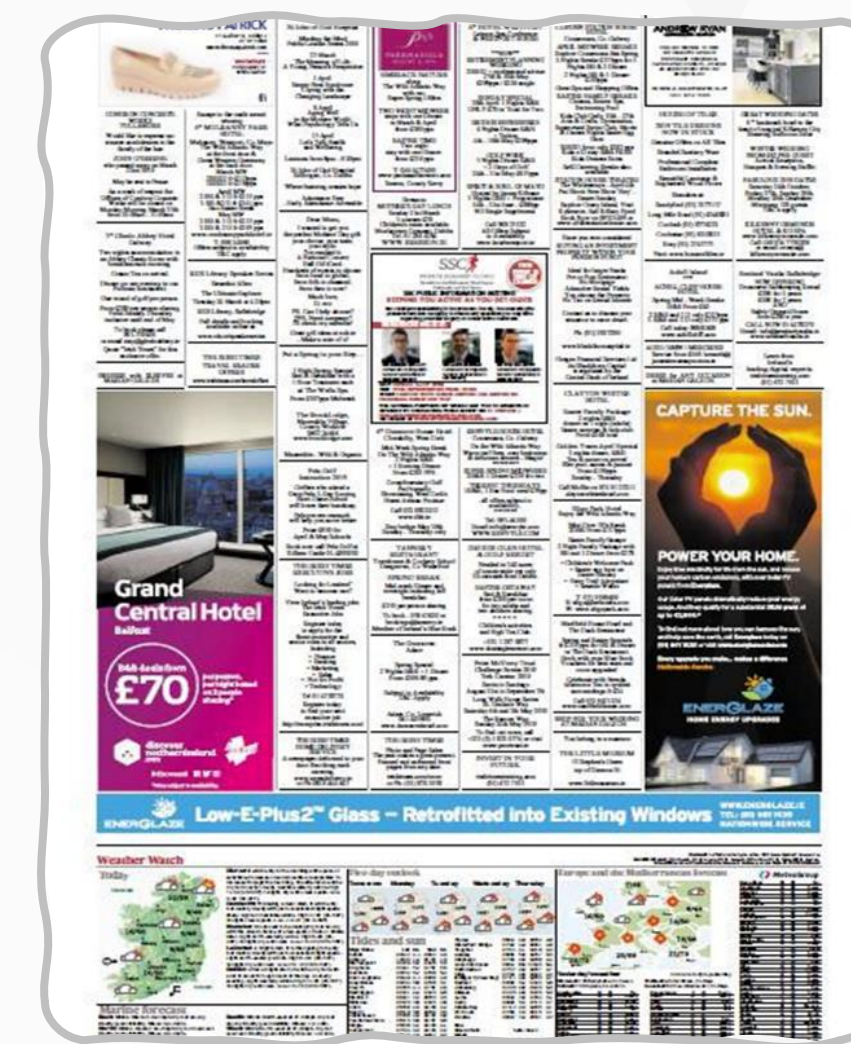
Travel Takeovers



Native Content Series pushed on social



DPS Advertorials

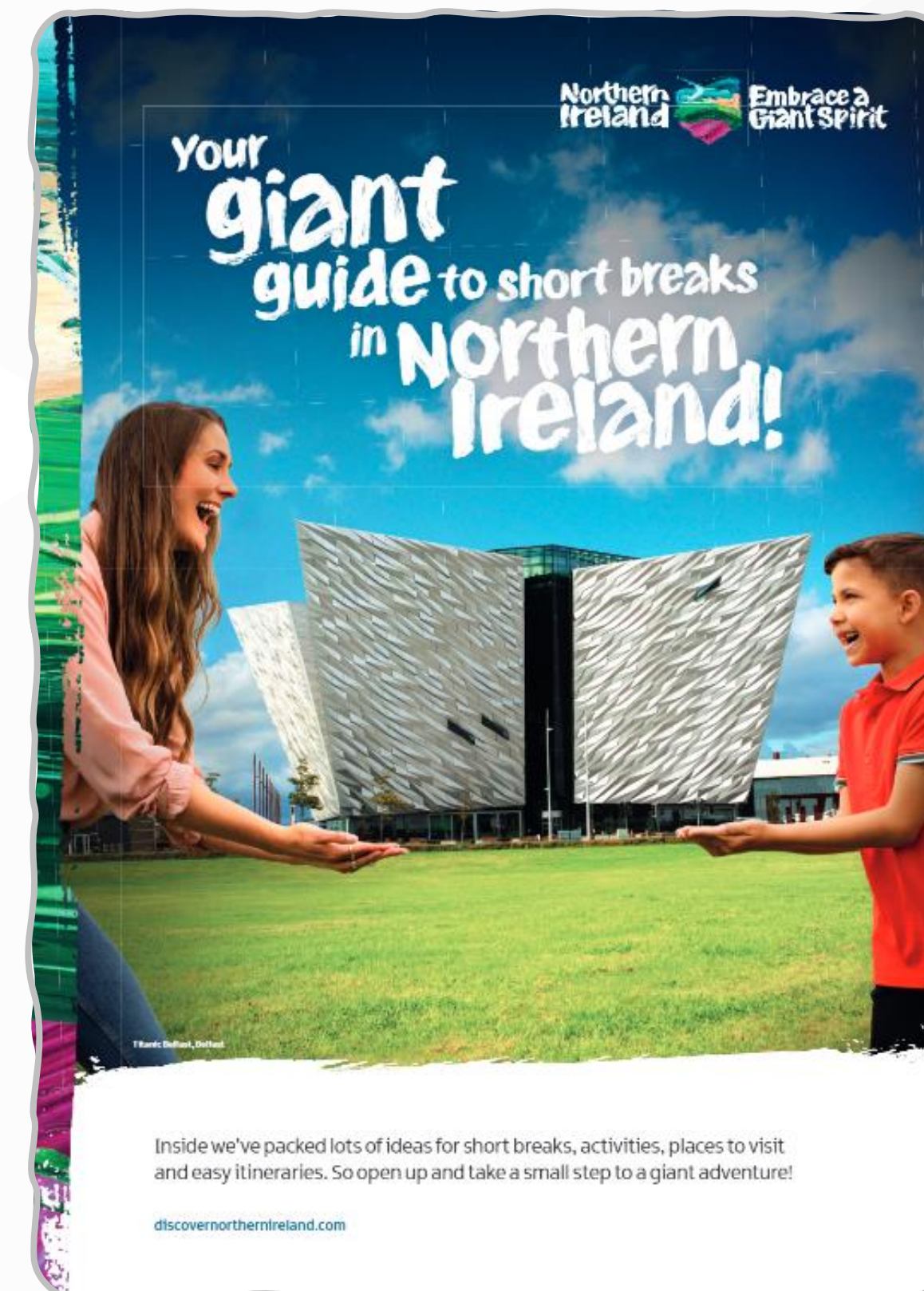


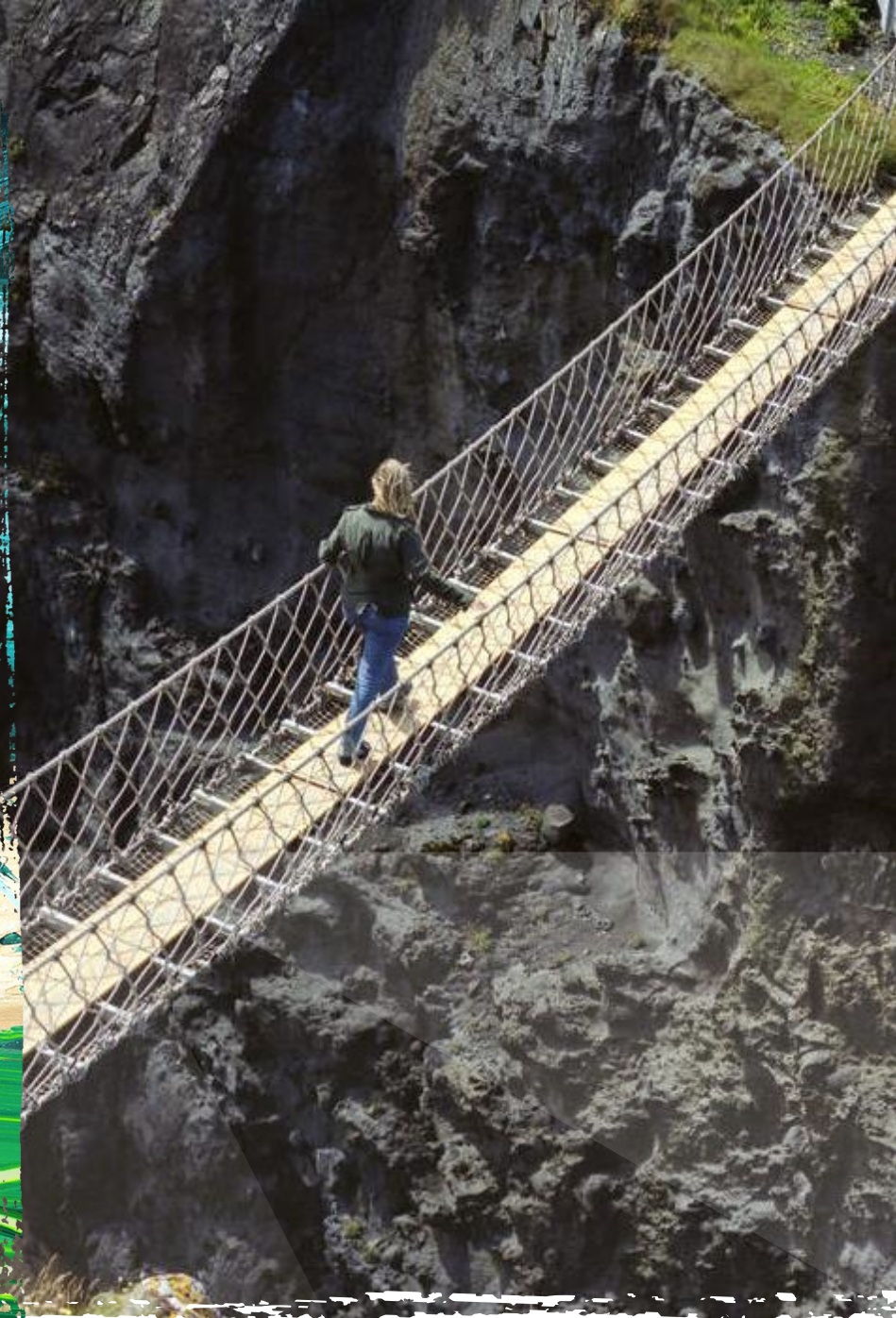
Classifieds VFM message



NI & ROI Bespoke Supplements

- 1 2 x 24 page supplements -
422,000 inserts
- 2 Tactically timed in June before the summer holidays to capture the **Aspiring Families** audience at end of September in the lead up to half-term.
- 3 **Telegraph** **SUNDAY Mirror** **DAILY Mirror**
SUNDAY THE IRISH NEWS News Letter
- 4 Bias towards weekend papers – segment paper purchase sees over 25% uplift and longer dwell time – **Lazy Sunday morning read.**





Inspirational
Travel



Inspiring
spokespeople
and **storytellers**



Broadcast
focus



Well-known
personalities to
tell the NI story



We're Good to
Go Messaging

PR APPROACH

The background is a collage of three photographs. The top-left photo shows a smiling couple on a boat with a coastal town in the background. The top-right photo shows a man in silhouette taking a picture with a camera. The bottom-right photo shows a couple standing on a balcony at night, looking at a smartphone. The text 'Digital & Social Media strategy' is overlaid in a white, hand-drawn font across the center.

Digital & Social Media strategy

NI/ROI Return to Market campaign

YouTube

All Segments

YouTube will be utilised to **reach users throughout the funnel to drive brand awareness** as well as reach users that are lower in the funnel indicating **higher intent**.

- **Affinity target** - (upper funnel)
- **Custom Affinity** - (upper funnel)
- **Custom Intent** - (mid funnel)
- **In Market** - (lower funnel)
- **Remarketing**

Display

SI/AM

Spotify advertising will be utilised to help raise awareness of the campaign through a different media output.

This will include **targeting users based on specific 'Interests** e.g. Travel' as well as 'Real Time Context e.g. Holidays'.

Social

All Segments

The Social activity will connect with users based on a variety of different targeting techniques. This includes:

- **Demographics** per specific segment (Aspiring Families 35-44 etc)
- **Interests based on online content** users have engaged with in the past including 'Hotels, Staycation' etc.
- **Online Behaviours** including 'frequent travellers', 'frequent international travellers',
- **Custom Audiences:** Lookalike audiences & Remarketing including both Page and Post Engagers
- **Social** will also be used to help where appropriate.

Display

All Segments

Display will be utilised to reach users in the mid and upper funnel based on predefined online behaviours.

- **Custom Affinity** - (upper funnel)
- **Custom Intent** - (mid funnel)
- **In Market** - targeting users that are within a 30 day purchase pattern for Travel.
- **Remarketing** - target users that have visited the DNI site but not yet converted.

These campaigns utilise **relevant segment demographic targeting** to bring the relevant creative to the relevant segments.

Search

All Segments

Search will be live in both the ROI and NI markets to capture high intent users that are actively searching for relevant keywords.

This transcends the segments within the markets as this activity focuses on the users search and the intent behind their search.



'we're to good to go' campaign

some channels:



Outdoor



Radio



Press



Digital

cities



Belfast-NI



Derry~Londonderry-NI

We will continue to respond to the changes in market dynamics

Ongoing data, research and insight will help us to **respond to change** and **evolve our plans**.



ROI Market Taskforce - **Research being undertaken** and **new learnings** will be used to refresh plans.



NI Market Review – we will continue to deepen **industry engagement**.



Ongoing Effectiveness Measurement will allow us to mine performance data to **optimise activities**.



#NISurviveReviveThrive

survive revive thrive



tourism
northernireland