

Belfast Tourism Forum

Malone House
30th June 2011

FOCUS TOPIC

Market focus from Tourism Ireland:

HOW CAN BELFAST PERFORM BETTER?

The GB market

- Why has it declined?
- What is being done to address this?
- How can Belfast grow both leisure and business trips, what is our competition,
- How can we improve the product to support Tourism Ireland, how can the city in general support Tourism Ireland
- What Tourism Ireland are doing to promote 2012 as this is a key agenda item for the next 6 months.
- What you think we should be doing more of to attract GB market.

- GB Market Context
- Competitor Landscape
- Belfast within 2011 Tourism Ireland activity
 - TV; Radio; Newspapers; Online; Social Media
- Tactical price led activity
- 2011 Trade Promotions
- 2012 and Titanic
- Shared Decision making - TRT / MPG

Market Context & Intelligence

Mixed Messages



Middle Britons to forgo holiday abroad

More than a quarter of middle-class families will remain in the UK for their annual holiday this year citing financial pressures, according to Experian

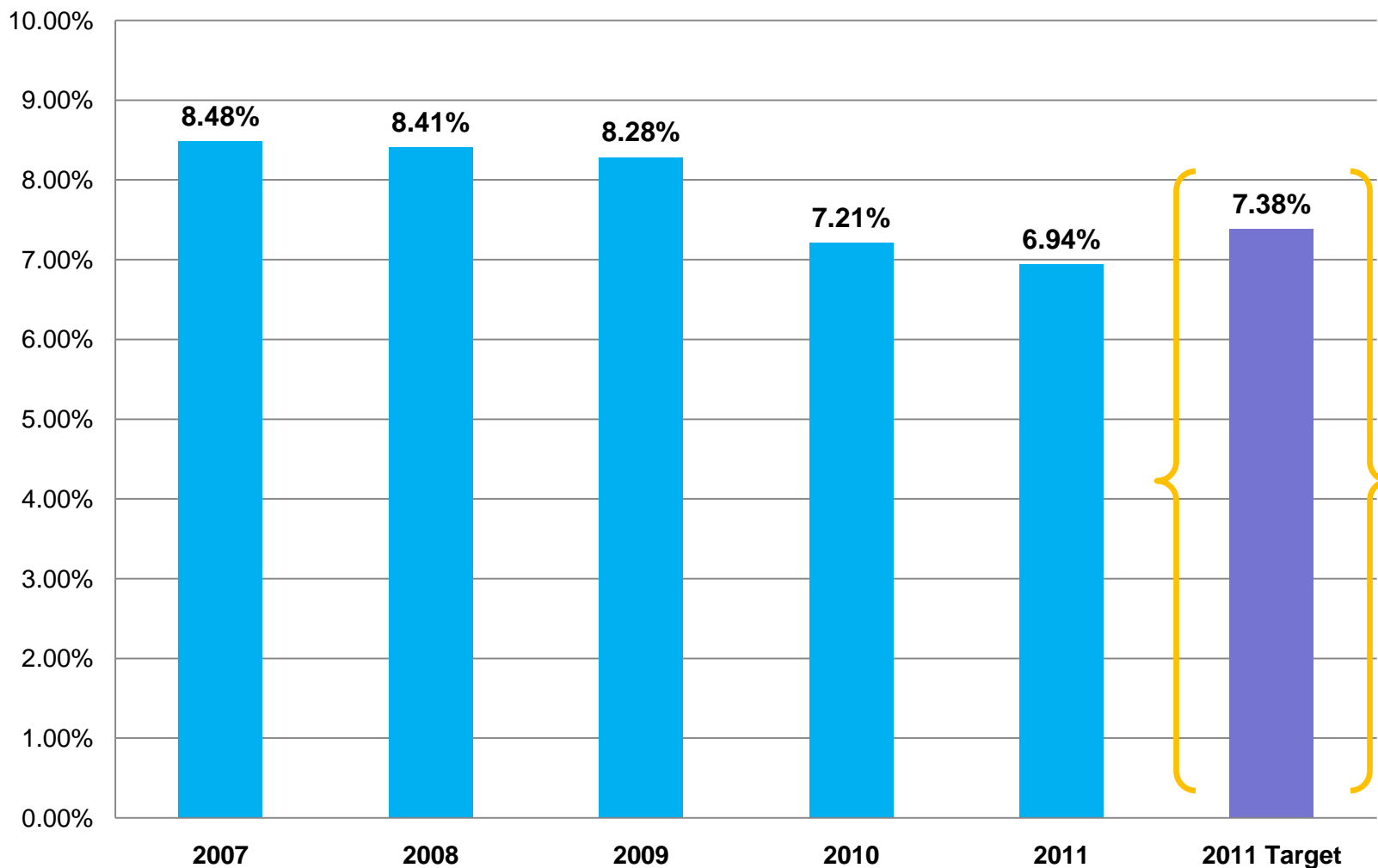
Consumer confidence rose by five points in March after the Index reached its lowest ever level in February
Nationwide Report

Growth continues, but unemployment and inflation continue to rise and consumer confidence is still falling.
2011 GDP Forecast: + 1.8%

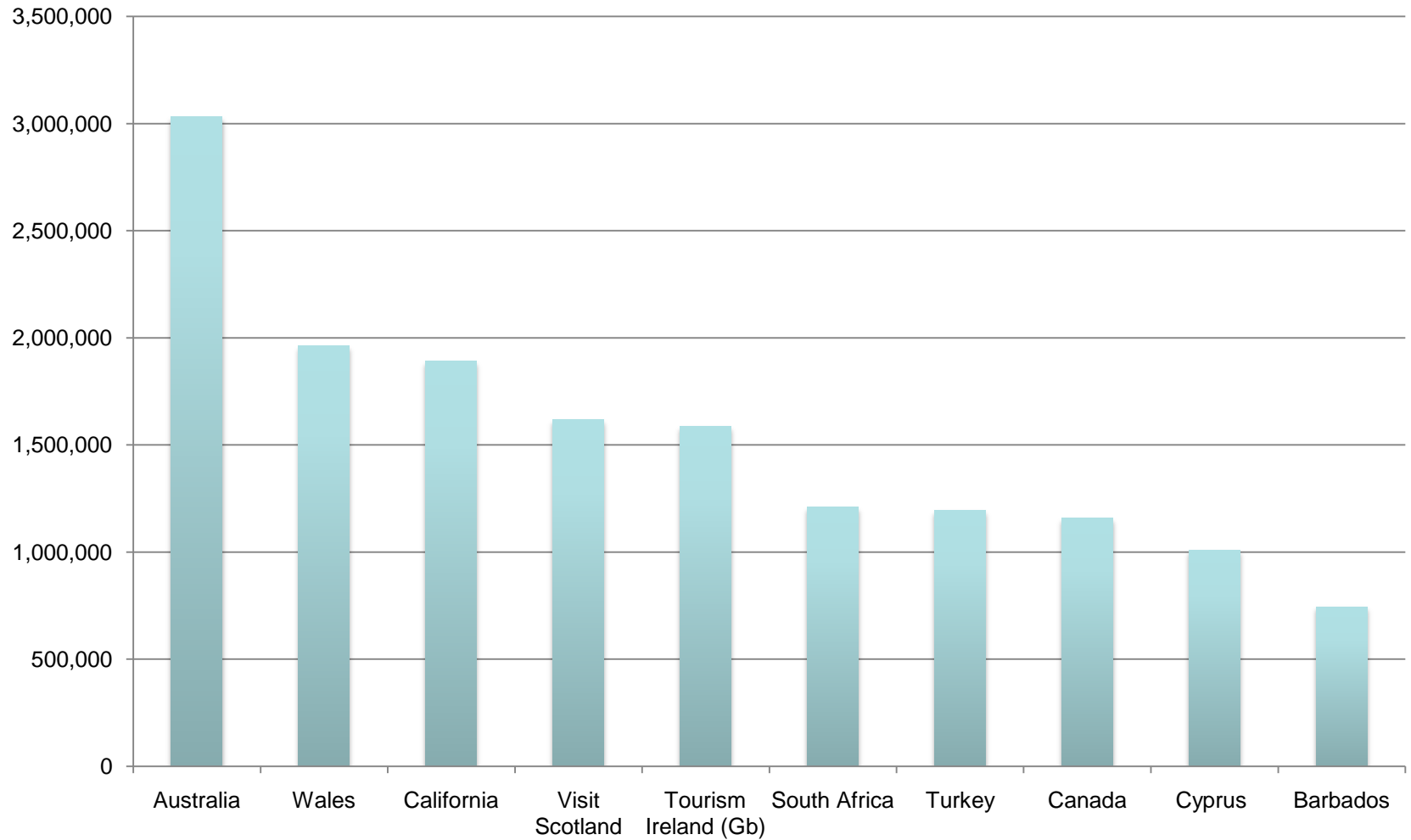
‘Although the recession is officially over, many consumers remain cautious given the economic environment and measures by the government to tackle the deficit’

The island's share of the GB market to Europe

The island's share of the outbound market to Europe

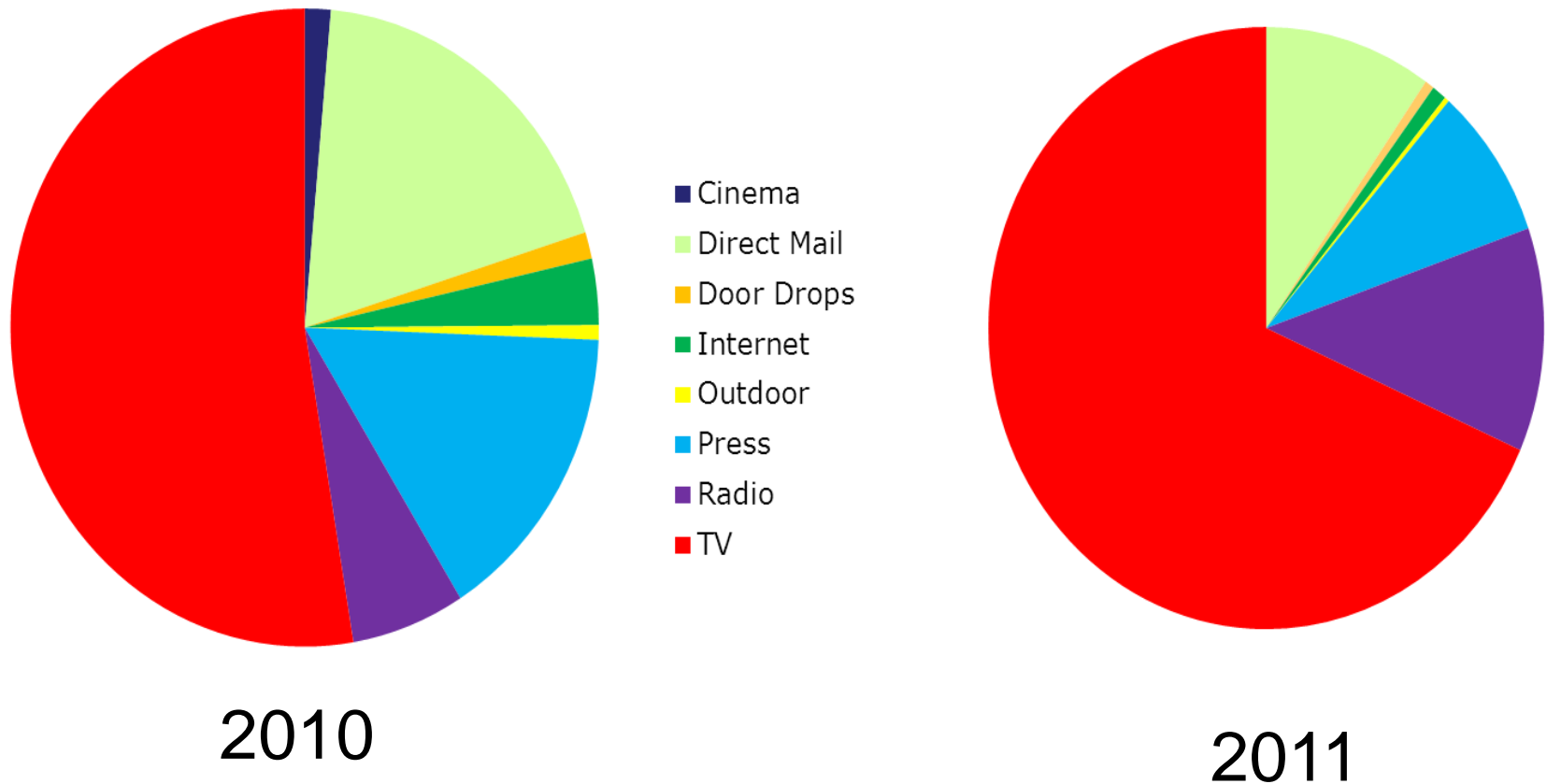


Top 10 spenders in the tourism market in Q1. Tourism Ireland is number 5.



Competitor Set Media Channels Shift

TV is still playing a large role in 2011 for our close competitive set but whilst press SOV has decreased, radio's has increased, driven by Tourism Ireland's investment.



2011 - Year Round Presence



J F M A M J J A S O N D

TV



Radio



Online



Search



Publicity



Social Media



Trade



Belfast / NI

Online Banner

- Wristbands' skyscraper
 - 'Radio' rich
- leaderboard to drive to Belfast campaign page.

Belfast TV ads

10 seconds commencing April 2011

Belfast Radio Ads

- 3 30 sec ads
- Belfast Ad 1
- Belfast Ad 2
- Belfast Ad 3



Direct Response -
emails, inserts and posters

Belfast reach 876K
Dates: 20/01, 25/01, 202 and 15/03



Q1. Topline Results

- 54,259 unique visits to the Belfast campaign page
- 80,696 visits to campaign area
- Competition entries 12,440
- EAV of €3.6m, Northern Ireland incl Belfast
- Banners achieved 58,183 clicks (0.9% CTR)
- Radio audience of 14.13m (55% of all 25 – 54 in GB)
- Email newsletters reach of 289, 482 (126k cold, 163k warm)

Belfast.
365 days of music and you get to choose the line-up.



Belfast.
365 days of music and you get to choose the line-up.

STORM MONT CASTLE		LAVERY'S BAR			ORMEAU PARK			MONO BELFAST			KATY DALY'S						
150	200	250	300	350	400	450	500	550	600	650	700	750	800	850	900	950	1000

TV & Radio 30s

TV ads

4 x 30 sec ads

March – October

Rural /Touring Message

Causeway Coast



Croke Park



English Market



Match Making Festival



Skelligs



NI specific 30s – March /April

Giants



Kinsale



TV - 10s

Dublin

April – 4 x 10 sec urban ads / May – 6 x 10 sec urban ads



Belfast



Magic Radio partnership



With Magic 105.4 Tourism Ireland has created a content-lead campaign which will explore Ireland beyond its cities.

MAGIC BREAKFAST PROMOTION - LAUNCH

A Breakfast Promotion with presenter Neil Fox launched on 23 May, giving listeners the chance to win a trip to Ireland, and driving them to find out more details and offers.



SUNDAY SPONSORSHIP

Tourism Ireland is the official partner of the Rick Astley show on a Sunday afternoon from 2pm-4pm (targeting listeners during their recreational time), starting 29 May, until 14 August.

Six 50" trails have been created promoting summer breaks in Ireland using the Ritual Iconic Brand Experiences, Northern Ireland Signature Projects and Priority Festivals.

The sponsorship will be promoted during the week using 30" trails.

Magic 105.5
1.9m listeners p/wk

ONLINE PRESENCE

Listeners will be encouraged to visit the magic website to find out more about Ireland and summer deals and for the chance to win a prize. Ireland will be the focus of a dedicated Magic newsletter sent out to a database of 65,000.



Screengrabs of 2 Roadtrip emails

Reach: 751k

Forward to a friend | ShareThis | Facebook | Twitter | YouTube

Starts Friday 20 May

NICK & SAM'S Ireland ROAD TRIP

You're in charge of where they go

Nick and Sam are going on a 7-day driving tour of Ireland. Here's the twist: **they want you to fill their Road Trip with colourful ideas and surprises.** Live. On the road. From breakfast to bedtime. [Meet our intrepid travellers >](#)

It all starts on **Friday 20 May**, and every day offers you an opportunity to get involved. Where do you want to send them?

5 ways to join in the fun

1. Share your Road Trip wishes with comments on the blog
2. Add your inspiration at Facebook (Discover Ireland GB)
3. Tweet your ideas (@GoToIrelandGB)
4. Vote for the next destination in our online poll
5. View the photos and films, and track the journey on our interactive map

"They're flying into Ireland - where they go is up to you >"

facebook

Offer up your trip ideas and suggestions

Discover Ireland GB

twitter

Tweet Nick and Sam @GoToIrelandGB

If that wasn't enough, there will be daily prizes up for grabs, and you'll have the chance to **win your very own Road Trip to Ireland for four.** Simply tweet, re-tweet, add your brainwave at Facebook or comment on the blog to enter. The road has never been more fun...

BE PART OF THE ROAD TRIP > Ireland

Forward to a friend | ShareThis | Facebook | Twitter | YouTube

NICK & SAM'S Ireland ROAD TRIP

JOIN IN NOW >

You tell them what happens next

We've already had delicious distractions and sublime surprises, but really this Road Trip has only just got started. Many thanks if you're already taking part. If you haven't yet, we say **join in the fun right now.** Tell our travelling couple what Irish gems you'd like them to see. You can share your ideas from now until May 27.

Where are they going? It's your call
Get involved every step of the way, every day of the trip.

5 ways to join in the fun

1. Share your Road Trip wishes with comments on the blog
2. Add your inspiration at Facebook (Discover Ireland GB)
3. Tweet your ideas (@GoToIrelandGB)
4. Vote for the next destination at our online poll
5. View the photos and films, and track the journey on our interactive map

Where will the roads lead you?

Great Irish Road Trips. Get your **FREE** guide->

Enter now for your chance to **WIN** >

Green for go!
WIN
your very own Irish Road Trip for four.

The fun never stops when you're on the road in Ireland. Check out some of the highlights of the Trip so far.

- DAY 1
Playing it Pura MacCúil at the Giant's Causeway.
- DAY 2
In search of adventure in the wilds of County Donegal.
- DAY 3
County Sligo worked its magic on Harry and Ronan.
- DAY 4
An inspired idea and we're off to County Clare.

HIT THE ROAD RIGHT NOW > Ireland

Guardian press and online partnership – “My Ireland”



Microsite content

- 6 x videos – 3 supplied by Tourism Ireland, and 3 created by the Guardian
- 7 x print advertorials in Weekend will be uploaded weekly following publication
- 1 x events calendar
- 2 x 500 word competition pages inviting readers to enter a prize draw and to learn more about summer holidays.

www.guardian.co.uk

2.2 m unique visitors p/mt

7 x Weekend advertorials

- Series of full page advertorials in Weekend magazine will encourage readers to explore Ireland beyond the main cities and to discover the real character of the country by bringing it to life through local people and their unique stories.
- Each will focus on the area and person introduced in the particular film which is being uploaded to the microsite that week

Circulation – 294,000k / Readership – 705,000k

2 x The Guide advertorials

- The Guide advertorials will encourage readers to book a holiday to Ireland by highlighting the country's diverse and vibrant cultural offerings.
- Both advertorials will focus on 10 of the best events happening around Ireland in the month of publication.

Running for 8 weeks from June

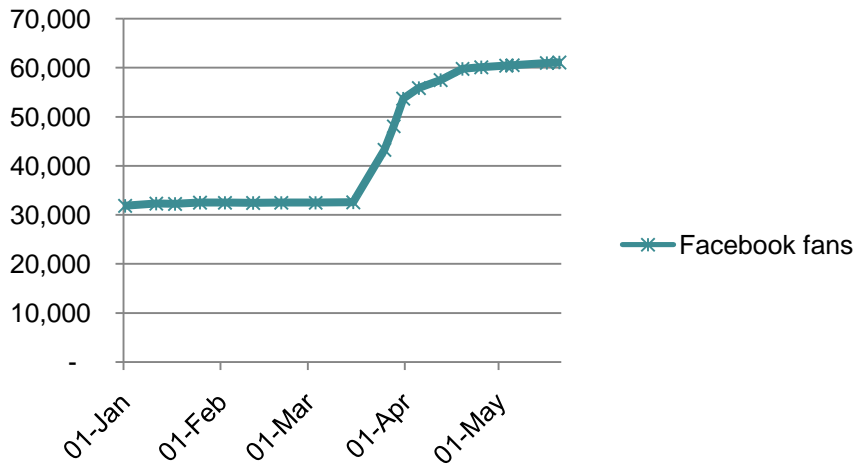
Promotion

- A full set of online traffic drivers, will be produced to promote the site and competitions, in tandem with the in-press advertorials

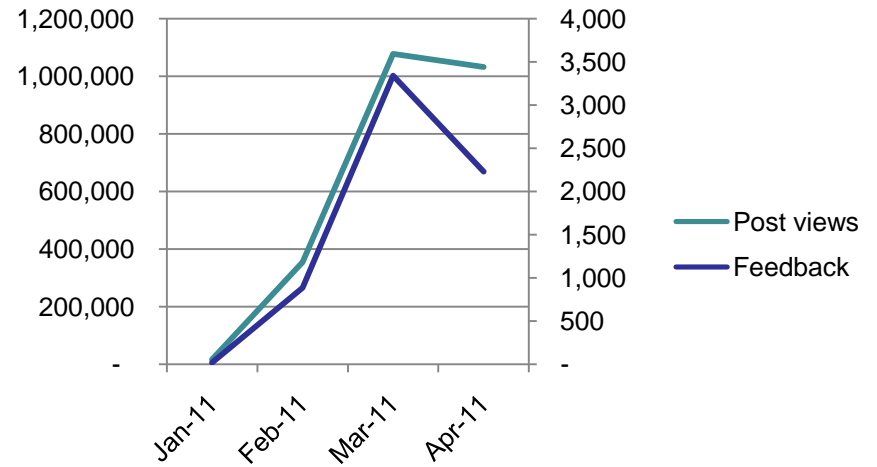
theguardian

Rise of Social Media

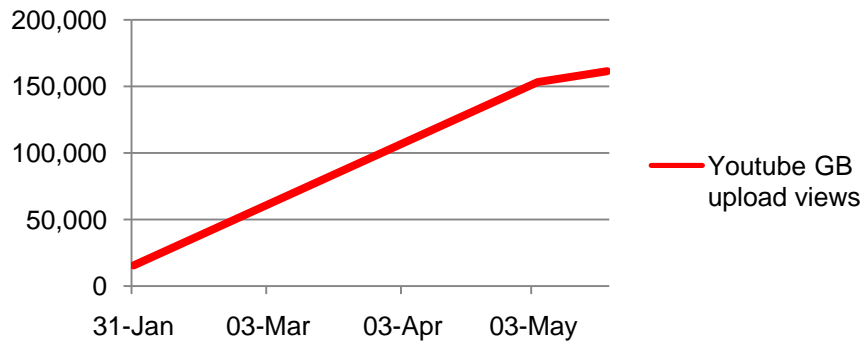
Facebook fans



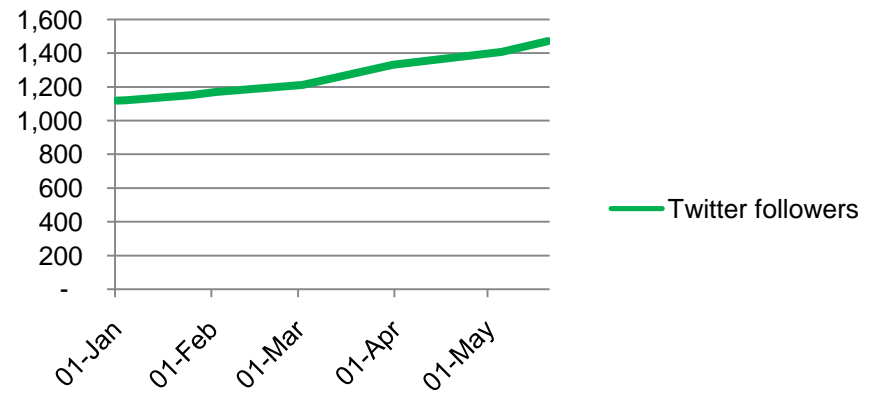
Facebook engagement



Youtube GB upload views



Twitter followers



Publicity



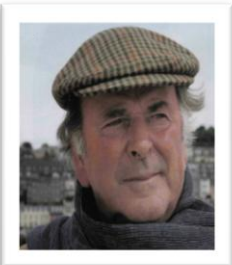
'The Story Of Ireland'
BBC2 5x1 hour primetime
Sunday evening

EAV 2010: €67.4m

EAV YTD 2011: €21.2m



Monty Hall's
'Great Irish Escape'
BBC 2



'Terry Wogan's Ireland'
BBC1 2X1 hour prime time
Sunday evenings
Est. audience 8.5m



UNWIND IN IRELAND'S MOST BEAUTIFUL COUNTY

Easv on

FIONA DUNCAN

Our hotel guru selects the best places to stay in the UK and what to do while you're there

TRANQUIL... Clav Bay and peat bog with its Fairy's stone near Croagh Patrick mountain

Sunday Telegraph

HOW IT RATES

FIONA'S CHOICE

WHAT TO DO

WHERE TO EAT

WALKS FOR MONEY

WHERE TO STAY

WHERE TO SHOP

BELFAST

Which city's better? The gods war in Dublin

DUBLIN

Which city's better? The gods war in Dublin

SIGHTS

FOOD

BEIRAT

DUBLIN

Which city's better? The gods war in Dublin

TRAVEL TIMES

FOOD

BEIRAT

BELFAST

Lively Dublin is perfect for a weekend break

Chris Watt finds Irish cap

FOOD & TRAVEL

BEIRAT

BELFAST

Lively Dublin is perfect for a weekend break

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FOOD & TRAVEL

BEIRAT

BBC Radio 4 'Excess Baggage'
Whale and Dolphin Watching SW Ireland

Value

- 2010 Visitor Attitude Survey shows improvement in GB experience and perception relating to value
- 50% of visitors were satisfied that ROI offers good value for money compared to 41% in 2009
- Although an improvement on 2009, from 32% - this level is still likely to be a barrier to growth from GB
- Value led offers through co-op and partner activities
- PR brief to include media focus on good value
- Campaign pages all include value offers



Ireland	2 nights' b&b, 2 rounds	3 nights' b&b, 3 rounds	
Carton House Maynooth, Dublin ★★★★★	fr £159	fr £205	Unlimited golf 1 in 12 stay & play FREE
Fota Island Golf Resort & Spa Cork ★★★★★	was £245 now fr £179*	was £288 now fr £229**	Getbreaks.com Exclusive
The K Club Straffan, Dublin ★★★★★	fr £225	fr £249	Unlimited golf 3 nights for the price of 2 Getbreaks.com Exclusive

Discover Northern Ireland with Aer Lingus
Headrow to **Belfast £39.99**
Includes: 100 mins and charges

Special airfare available only on the Family Plan of the remaining class of Economy. Air granted to crew. Not available for 4th night before setting down for the morning. The only further Ireland spots are the Family Plan.

**Getbreaks.com
Exclusive**

Aer Lingus

Cashier No.9 by Carrie Davenport

Home > Musical Belfast

Belfast music festival - 365 days a year!

Fancy coming to a year-round music festival - where you choose the line-up? Whatever your musical tastes, Belfast will have a gig, festival, or concert to tickle them. Our handy Trip Planner lets you pick and choose your own line-up, as well as places to stay and things to see, for a seriously harmonious city break.

Belfast is packing in the musical acts in 2011! **Lark in the Park** will be kicking off the festival season on 29 April to 1 May with local boys **Divine Comedy** taking to one of the five stages over the weekend. Or plan a trip during August when **Belfast** takes over the best venues in the city for a week, bringing the best new music acts from around the world to Belfast.

The local scene is popping with great spots to see new bands. Local band listings are easy to find on belfastmusic.org, and keep an eye out for fresh Northern Ireland talent like **Duke Special**, **Cashier No 9**, or **Farmers**. Head to the Spring and Autumn or Autumn Animes for an intimate gig some top-notch stars like **The Hold Steady**, **British Sea Power** and **Gogol Bordello**. Don't forget to nip into a traditional music session before you head home. These are all over town, but some prime spots include Madden's and Fibber Magees.

So come join us in Belfast and step it up a musical notch by using our handy Trip Planner to plan your city break and choose your own line-up, adding gigs, festivals, places to stay, plus great deals to help you make the most of your holiday. Enjoy, and hope to see you at a gig soon!

You can hear **Mat Home's** take on the Belfast music scene [here](#). **This Channel 4**

Hot Offers
Great deals on unique Belfast experiences

- Discover the magical background of the Titanic and Belfast and save £36 per person sharing. From £94ppsn based on a three night stay.
- Two nights B&B plus dinner both nights. From £110 pps.
- Premier Movie Package. From £72 pps.
- Enjoy a down to earth local guided Belfast black cab tour.

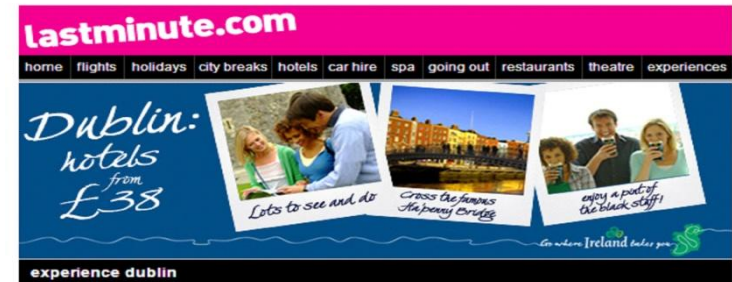
★ More great Belfast offers >

Co-operative Marketing so far



Lastminute.com

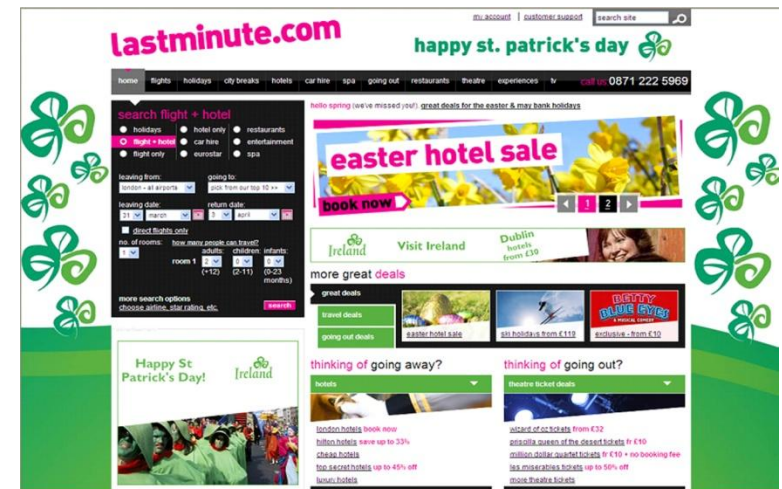
- Activity ran Jan – March
- Online co-op display ads for Dublin & Belfast
- Exclusive homepage take over on St Patrick's Day
- Week of 21/03 bookings to Ireland increased by 10% and Dublin by 20%



experience dublin
Dublin is packed full of culture and personality. Did you know it was recently awarded the **UNESCO City of Literature** title?

Find your inner Maeve Binchy or James Joyce and explore all that **Dublin** has to offer from the **Dublin Writers Museum** to the **Viking Splash Tour** to the **Guinness Storehouse** and sample a pint or two of the black stuff along the way! With hotels from £38 isn't it time you visited **Dublin**?

[click here to book your dublin hotel](#)



Expedia and Hotels.com



- Activity running Feb – May
- Homepage Wallpaper on St Patrick's Day
- Newsletter Insertion in Expedia and hotels.com combined database approx 1.15m
- Email to Nectar card database approx 1.25m GB consumers

Craicing Dublin deals
Explore Saint Patrick's Cathedral and legendary Temple Bar – with great discounts on our customers' favourite Dublin hotels.

Book by 3rd April at Expedia.co.uk

Plus, for a limited period only, enjoy DOUBLE Nectar points on hotels!

Discover Ireland takes you

Discover Ireland
Come and enjoy our laid-back lifestyle, scenic views and stunning landscapes.

California Lisbon Edinburgh Amsterdam

Hotels from £22 Hotels from £24 Hotels from £22 Hotels from £22

Package holidays
Canary Islands Algarve Turkey Egypt

Castillo Playa 3* DEALS
Burgos 7 nights from £214

Eden Resort 5* DEALS
Sole 7 nights from £248

Orta 4* ALL INCLUSIVE
Double room 7 nights from £260

Sharm Resort 4* ALL INCLUSIVE
Double room 7 nights from £269

Bargain holiday favourites

Cheap flights (departing from London)

Destination	Travel dates	From
Bangkok	01 May - 02 May 11	£109
Venice	02 Apr - 05 Apr 11	£118
Rome	12 Mar - 14 Mar 11	£126
New York	10 Mar - 13 Mar 11	£146
Los Vegas	24 Mar - 23 Mar 11	£164

Great hotel deals

Destination	Star rating	Duration	From
Los Vegas	4.5	7 days	£2 per night
London	4.5	7 days	£22 per night
New York	4.5	7 days	£22 per night
San Francisco	4.5	7 days	£22 per night
Doha	4.5	7 days	£26 per night

Flight + hotel (departing from London)

Destination	Star rating	Duration	From
Athens	4.5	7 days	£162

Bargain package holidays

Destination	Star rating	Duration	From
Athens	4.5	7 days	£136
Bangkok	4.5	7 days	£141
Taipei	4.5	7 days	£126
Sharm el Sheikh	4.5	7 days	£184

Need help booking?
Call 0330 123 1235
Calls to the above number uses the same as calls to local businesses.

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Derry – Londonderry UK City of Culture 2013

- Feature in fares email to 1.2m email
- National and Regional Press

Dublin City of Literature Campaign

- Dedicated Dublin City of Literature email to 1.2m database
- Dublin Feature in fares email to 1.2m email

FLY RYANAIR one way from **£12**

DERRY-LONDONDERRY UK CITY OF CULTURE 2013

Scroll around the ancient Walls. Chill out at a range of cosmopolitan cafes, bars and restaurants or catch a gig at one of our many cutting edge live music venues. Take in a West End production at the Millennium Forum or try the Playhouse to witness Derry's home grown writers, poets and performers in action.

Derry-Londonderry – a city with a new story to tell... See www.ryanair.com/ireland for details.

RYANAIR

Book until midnight 17.02.11. Travel Jan - Feb. Subject to availability. Terms and conditions apply, see Ryanair.com for details. Fares exclude optional services. Flights from London (Gatwick & Stansted).

Subject: Because you're worth it...flights from £7

RYANAIR
FLIGHTS HOTELS CAR HIRE AIRPORT TRANSFER TRAVEL INSURANCE FAQS

Dear Subscriber,

Fly with Ryanair to some of our Fantastic Destinations, take a Sun Break or head away for a long weekend. Fares from £7 will take you to some of the places that you have never been. This sale will not last long so make sure you book on Ryanair.com, offer ends midnight 26/04/11.

[Click here for more details](#)

TOURISM IRELAND

Derry-Londonderry
UK city of Culture 2013

[VISIT NOW, go to ryanair.com/Ireland >](#)

TRAVEL OFFERS

SALE 7

BOOK YOUR CITY BREAK HERE TODAY

Dublin
Europe's Literary City!

Ireland

Proving the pen is mightier than the sword, the Irish have a unique way with words that can be enjoyed through the ages and Dublin is bursting at the seams with literary giants old and new. James Joyce, one of Ireland's most famous authors is celebrated with a big Bloomsday Festival every year and Roddy Doyle is internationally feted for his evocative portraits of his home town.

And the pub has a special place in Dublin life, not least because literature and drinking seem to go hand in hand in Ireland. You can even experience this yourself on the Dublin Literary Pub Crawl.

[VISIT NOW, go to ryanair.com/Ireland >](#)

RYANAIR www.ryanair.com/ireland

FLY RYANAIR one way from **£12**

DUBLIN-EUROPE'S LITERARY CITY!

Proving the pen is mightier than the sword, the Irish have a unique way with words and Dublin is bursting at the seams with literary giants old and new. The pub has a special place in Dublin life, not least because literature and drinking seem to go hand in hand. Visit Dublin and see for yourself! See www.ryanair.com/ireland for details.

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bmi & bmibaby – Belfast Campaigns discoverireland.com

Belfast, six daily
flights, seven days a
week from Heathrow.

A STAR ALLIANCE MEMBER  flybmi.com

bmi Campaign


Online and Radio

With dozens of live
venues, Belfast is the
city of music.

[Book now](#)

A STAR ALLIANCE MEMBER  flybmi.com

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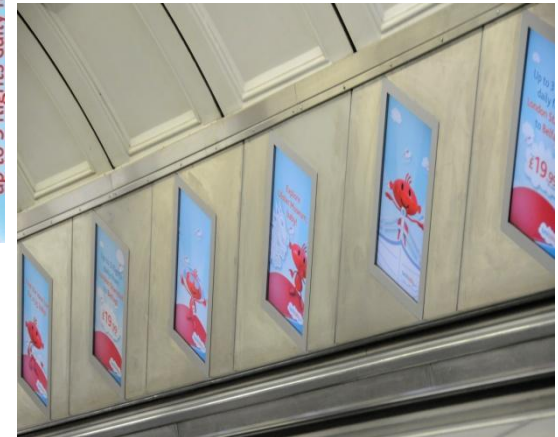
up to 3 flights daily from £19.99 inc. taxes

The gateway to Belfast, baby!

- ✓ Visit the museum!
- ✓ Find a bar for a jig!
- ✓ Discover a titanic tour!
- ✓ Head for a brilliant gig!
- ✓ Tee off at The Royal Belfast!

Stansted to Belfast

up to 3 flights daily from £19.99 inc. taxes



bmibaby Campaign

Escalator panels and ticket barriers at London Liverpool Station and London Victoria Station

Trade Promotions

Best of Britain & Ireland (BoBI)

- Mar 16 & 17
- 22 Trade partners participated

Scotland Roadshow

- Mar 10 - 12
- 12 partners from NI participated
(6 Iconic Attractions and 6 Hotels)

Ireland Workshops

- Apr 4 to 7
- Meitheal 52 GB operators attended
- Meet The Buyer 27 GB operators attended

Manchester Roadshow

- Jun 23 - 25



Northern Ireland Roadshow in Manchester

Thursday 23rd - 25th June 2011

Thursday 23rd June

- Networking event with Tour Operators, group organisers, retail travel agents.

Friday 24th June

- Northern Ireland Promotion desk (Airside)

Fri & Sat 24th & 25th June

- Northern Ireland Promotion desk in Trafford Centre, Manchester



- New creative & media agencies appointed
- New creative & media strategy in place for Q4 2011
- Northern Ireland 2012
- Olympics



- Market fragility continues to affect outbound GB travel
- Value and differentiation continue to be key
- Marketing plans continue to be refined in line with ongoing results
- New Market Partnership Group
- Brand Tracking results available in July
- Tourism Renewal Taskforce GB research project underway – results due in September