



Northern Ireland
visitor inspired

Northern Ireland Short Breaks Insights

Insight Series - September 2009





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1. INTRODUCTION

It doesn't matter if you are an hotelier or a campsite owner, a restaurateur, a coach company or a bike-hire specialist this short breaks insight paper is for you.

A quick guide to growing trends, visitor expectations, pet hates and must haves, this paper is about identifying potential to enhance the visitor experience and your business' bottom line.

It is the first paper in a series of six designed to inform, enthuse, motivate and direct the industry towards capitalising fully on the potential that exists within the tourism sector now and in preparing for the future.

No bright lights or dazzling promises, this is a practical guide. We aim to make sense of the research available, to challenge our current approaches to the visitor experience and to hopefully identify and highlight tangible opportunities for you.

Finally, we must practice what we preach – let us know if this paper works for you, or indeed if we have missed something that you feel would be helpful to report on to your colleagues in the industry at large.

2. SETTING THE SCENE

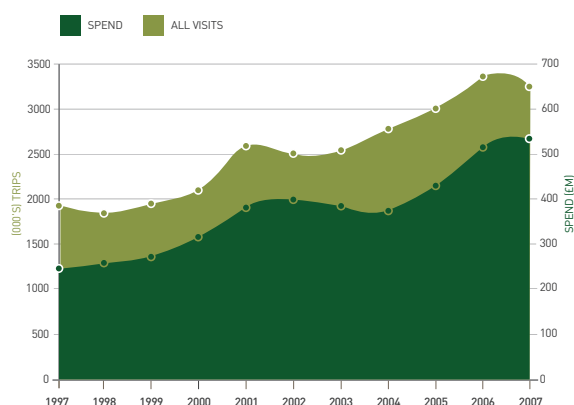
2.1 Tourism is big and it's getting bigger

Tourism in Northern Ireland (NI) is worth an estimated £889m, or some 3.7% of the Gross Value Added of NI. Going forward, tourism, and its supporting industries, is projected to be the key driver for economic growth contributing significantly to both job and wealth creation.

As noted in the Northern Ireland Strategy working paper, from 1967 to 1997 tourism grew very slowly with visits doubling from 1m to 2m over that 30 year period. The political situation stifled the potential of tourism when most western economies were seeing their tourism sector flourish.

In contrast, the next 10 years from 1997 to 2007 has been a period of rapid growth with the number of visits increasing by 65% (refer to figure 1). At the end of 2007 the world was hit by the global financial crisis and this has had an impact on all business activity and led to a drop in global tourism in 2008.

FIGURE 1:
ALL NORTHERN IRELAND VISITS AND SPEND 1997-2007

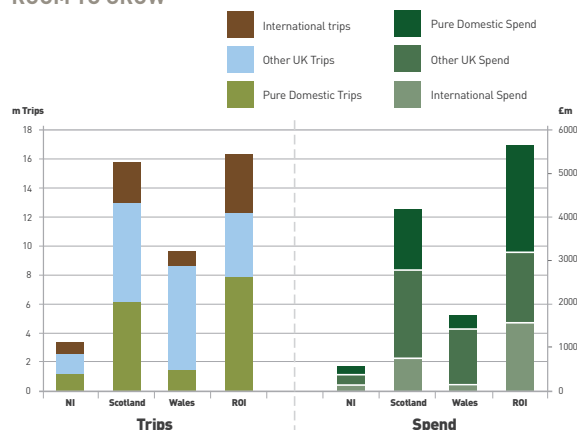


SOURCE: NITB/MLA ESTIMATES

As indicated in the figure below, while tourism is a growing part of the NI economy, our size and our contribution to the economy overall is significantly behind competitor destinations.

We have significant strides to make, however the opportunity to grow in particular the short breaks market (defined as holiday leisure recreation trips lasting 1-3 nights) is apparent.

FIGURE 2:
ROOM TO GROW

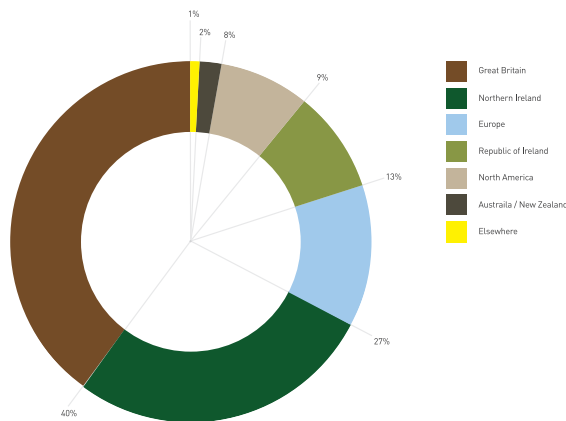


SOURCE: NITB/Failte Ireland/Visit Scotland/Visit Wales (all 2007 data)

3. OVERVIEW OF OUR 2008 VISITORS

In 2008, NI welcomed approximately **3.3 million** visitors and domestic tourists, who stayed almost 13 million nights and spent **£540 million**. There's no question that tourism in Northern Ireland is big business! The figure below provides a breakdown of visitor spend per country.

FIGURE 3: HOW MUCH DID OUR VISITORS SPEND?



SOURCE: NIPS, 2008, NITB

3.1 Movers and shakers

Going up

NI's success story for 2008 was the increase in Republic of Ireland (ROI) visitors. This was the only main market to show growth in 2008. Indeed, ROI visitors coming to NI in 2008 increased by 14% compared to 2007, while the number of these visitors coming for a holiday grew by 26%. Thanks in part to the strong Euro our ROI visitors spent some £50m.

Other markets that shared growth included Spain (up 24%) and the USA (up 11%). There was also good news as visitors from Australia/New Zealand/Elsewhere increased by 14,000 (+19%)!

Going Down

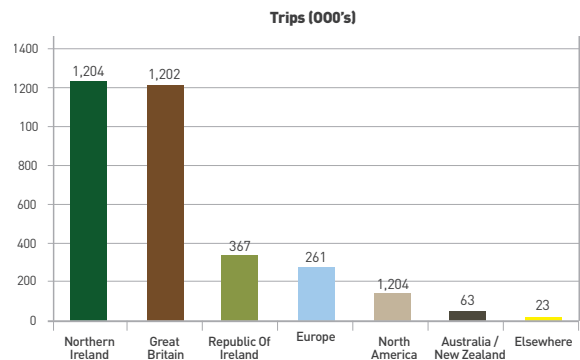
Even though the total number of domestic overnight trips increased by 4%, this growth came from non-holiday related journeys. On the whole, domestic holidays were down 8% in 2008 compared to 2007.

Domestic visitors are still important though as NI short break visitors spend more per night than any other country – averaging £65 per night.

The total number of Great Britain (GB) visitors to NI declined by 6% in 2008, compared to 2007, mainly due to fewer business and VFR trips.

The biggest declines in Europe came from German and Italian visitors. Canadian visitors also dropped (by 36%), most probably due to the collapse of Zoom and the withdrawal of Air Transat.

FIGURE 4: WHO CAME TO NI IN 2008

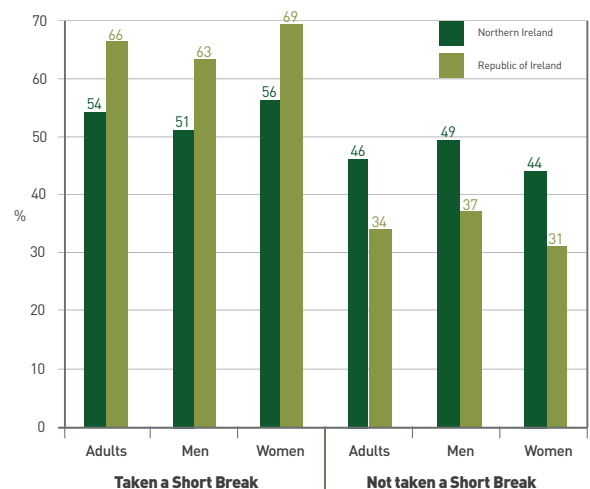


SOURCE: NIPS, 2008, NITB

3.2 The gender debate

As indicated in Figure 5, 56% of NI women and 69% of ROI women took a short break in 2008. Men are more likely to participate in sporting activities and could be tempted into taking more short breaks if sport is used to motivate them.

FIGURE 5: CONSUMERS WHO HAVE TAKEN SHORT BREAKS, BY GENDER, NI & ROI 2008



SOURCE: MINTEL - SHORT BREAKS REPORT, JULY 2009

3.3 When did they come?

According to recent research, the demand for short breaks is almost evenly spread across all four seasons, with a slight spike during July-September.

Business visits were spread out consistently throughout the year with approximately 25% visiting in the first three quarters of 2008, dropping to just over 20% in quarter 4.

3.4 What drives the short breaks market?

The principal drivers of growth of the breaks market have included:

- Increased economic prosperity
- Growth in low cost air routes, and
- Aggressive marketing by carriers, other travel providers, and destinations

Chase all your cares away

Over half of NI residents and two thirds of ROI residents have taken a holiday or short break in the last 12 months!

A quarter of Irish people claimed that a need to escape was what drove them to take a short break, with work and family responsibilities the key drivers. Consumers aged 35-64 are the most likely to feel stressed and in need of a short break. This age group tends to have more disposable income and are more likely to be able to afford multiple short breaks, or will spend more when on holiday.

It's all in the planning – Internet rules!

Almost 4 out of every 5 UK short breaks are booked direct. Do-it-yourself online planning and booking is now the accepted norm with the use of travel agents in sharp decline.

“I would plan out my holiday now whereas before I would have taken a package. I would go on the internet and source it.”

SOURCE: ROI FOCUS GROUP RESPONDENT

Most want to read independent reviews, from other travellers or peer-reviews when considering a new destination. Online blogs and consumer reports are the new ‘word of mouth’.

Consumers gather information from a range of sources spanning from traditional media to new media depending on their life cycle.

Late bookings

The recession has accelerated the trend towards late bookings of short breaks. 47% of ROI consumers intend to wait to the last minute before booking holidays.

Accommodation

Domestic and ROI short breakers opt for hotels and four/five star self-catering accommodation.

NI residents accounted for a quarter of all self-catering bookings compared with just 8% of bookings attributable to ROI.

4. OUR CURRENT POSITION

4.1 Strengths

- ROI residents are **more likely to take a short break** in NI compared to 2 years ago
- **NI tourism is reinventing itself** - we are building a successful NI brand – to define what makes NI unique and worth visiting; to stand out from the competition
- **Signature projects** - are the key to delivering world class experiences
- **Weak pound boosts NI** - the weak pound has helped to boost NI tourism

4.2 Weaknesses

- NI is perceived as **lacking excitement**, novelty and anticipated fulfilment
- NI has **product development gaps**

- There is a **dearth of priced offers** in the marketplace
- **Competition is increasing** with discounting of both domestic short breaks and outbound travel

4.3 Opportunities

- **Position a differentiated destination -** Leveraging small, distinctive variations will help to elevate a short break in NI. It's the little differences that count
- **Present more offers in the marketplace** in the traditional and new media channels
- **Use market intermediaries** to target social groups, coach tours and meetings
- **Maximise direct access!**
- **Turn today's day tripper into tomorrow's short breaker**
- Maximise the **exchange rate**
- Maximise the **nano break**. Short breaks are becoming shorter

4.4 Threats

- **Competition is fierce**
- Demand for **domestic short breaks is in decline**
- **Consumer confidence** means foregoing short breaks
- **Unfavourable exchange** rates will impact volumes coming to the island of Ireland
- Threat of **swine flu**
- **Access threat** in Summer 2009, the capacity to Europe dropped 17%, GB dropped 13% and Canada dropped 85%
- Recent **security issues** have had the potential to impact of NI tourism
- **Business tourism is waning** - there was a significant decline (-7%) in business visitors in 2008

5. SPOTLIGHT ON OUR VISITORS

5.1 Northern Ireland

Locals can be visitors too, so don't take them for granted

Domestic tourism contributes one third of total tourism revenue with each guest's average daily spend higher than that of any other market.

Competition for share of the domestic market is fierce and outbound travel has been increasing steadily in recent years from an estimated 3m in 2004 to 3.5m last year compared to an estimated 1.2m home holidays.

While it is too early to predict 2009 performance, according to accommodation occupancy reports, for the first half of 2009 there has been a slight increase in domestic short breaks taken.

The domestic market is a vital source of business for the tourism industry particularly those outside of Belfast accounting for:

- 35% of all hotel guests
- 50% of hotel guests in the North West, North East and South East regions
- 2/3 of hotel guests in the South West region
- 25% of guesthouse and B&B guests
- 50% of self-catering guests

+ Accentuate the positives

Opting to stay at home has some positives. It is viewed as being more convenient: the scenery is wonderful and NI residents are very proud of the tourism offering when showcasing it to friends and family.

Distance and ease of getting to places is one of the top appeals. The nostalgic appeal also works for segments of the market, revisiting past experiences together and sharing the memory with others.

Our recent research shows that over half of NI residents have taken a holiday or short break in the last 12 months – demand is there, but you have to fight for attention and should dial up convenience, difference and value!

- Challenge the negatives

For many residents, short breaks in NI are 'off the radar'. They're simply too close to home, too familiar or not distinctively different.

“Sure you could just go there and come back on the same day – why stay over?”

SOURCE: NI FOCUS GROUP RESPONDENT

Holidays or leisure breaks outside of NI are perceived to offer the opportunity to get away from the everyday environment: to offer more and to be more geared up to providing what people want and expect from a short break: buzz and 'craic'; city culture; country culture; hotel/resort breaks.

It is clear that for many, there is a gap in awareness of the depth, quality and range of holiday options on offer in Northern Ireland. Beyond Giant's Causeway, Glens of Antrim, Lakes of Fermanagh, Odyssey Centre, Belfast City Hall, Ulster Folk and Transport Museum and Ulster American Folk Park awareness, of NI, particularly among younger people, is very low.

“Where is Rostrevor.... Is that in the Sperrins?”

SOURCE: NI FOCUS GROUP RESPONDENT

“There isn't really much here, apart from the likes of the tourist sights, the Giant's Causeway, is there anything else in Northern Ireland to do on holiday because I haven't heard of anything?”

SOURCE: NI FOCUS GROUP RESPONDENT

For many, a 'proper' short break means leaving NI. They assume that facilities are pretty basic, dated or old fashioned. They recognize that the attractions and scenery are great but that NI is so small that you can do it all on a day trip, so why bother staying over?

5.1.1 Northern Ireland domestic visitors

Who are they and what are they looking for?

Home holidays are convenient, allowing for maximum leisure time and repeat visits are BIG BUSINESS. Recommendations from family and friends and the internet drive the majority of bookings today.

- **Empty-Nesters** are cash and time rich, over 50's who take regular breaks. They want city, rural and coastal breaks in high-quality accommodation. They enjoy good restaurants and famous attractions. They respond well to mid-week offers
- **Couples** are cash rich but time poor. They are over 25's without children. They want luxury accommodation, romance and fine dining. They travel at weekends and enjoy extended weekend breaks
- **Families** - it's all about value for money and catering for the children. They travel at weekends and during school holidays. They are strapped for time and prefer locations within a 2 hour drive of home. They want child friendly accommodation with lots of activities for the children

5.2 Republic of Ireland

Southern Comfort

The ROI is going through the greatest drop in economic output since its formation. A banking crisis has led to rapid property deflation and the widespread contraction of the economy. The end result being a population that feels hurt, bruised and disaffected with 'rip-off' Ireland.

As you will see, this key target audience value their leisure time and love short breaks – they seek comfort, reassurance and a quality time.

In 2008, an estimated 4.4 million holiday or leisure trips were taken by Irish residents in Ireland, representing 2 out of 3 hotel guests:

- 3.23m were short breaks worth €600m
- 1.15m were longer holidays worth approximately €430m

Last year €7billion was spent on out of state travel, suggesting that expenditure on domestic travel represented 12% of total expenditure on travel.

Between 2004 and 2008, domestic leisure trips grew by 40%; the majority of which were short breaks. The over 50's now account for 42% of all Republic of Ireland's home holidays. This group has been the driver of the majority of the overall growth; increasing by almost 150% in the last five years.

Business trips, however, appear to have fallen back from a peak in 2005.

The key growth drivers of the ROI holiday market included:

- Pre 2008, the economy was booming. Employment and disposable income were on the up. Not surprisingly approximately one in three of all domestic travel trips originate from Dublin
- Consumer demands were shifting from traditional holidays to shorter, more frequent breaks
- Competition increased and travel dynamics changed with low cost carriers
- Hotel resorts in ROI increased significantly. To secure share they developed attractive value offers

5.2.1 Republic of Ireland visitors to Northern Ireland

Who are they and what are they looking for?

ROI visitors coming to NI in 2008 increased by 14% compared to 2007, while the number of these visitors coming for a holiday grew by 26%.

While the Pound remains weak against the Euro, NI can expect to experience an increased level of visits from ROI consumers. Due to the proximity, many visitors from ROI choose to simply make day trips to the region. Trade sources indicated that the level of ROI consumers visiting NI during the Christmas period increased 150% in 2008.

Broadly speaking, the profile of ROI visitors to NI typically comes from Dublin or greater Dublin. Repeat visits are BIG BUSINESS with more than half of previous visitors considering their next trip. Recommendations from family and friends, the internet and the press in ROI (especially the back page of the Irish Times) drives the majority of bookings today.

In the main, they come to NI to spend quality time together; for a change of scenery and a break from the routines of daily life. They also like to recharge the batteries, with more than 1 out of 5 of ROI consumers taking a short break to coincide with a bank holiday.

- **Empty-Nesters** are cash and time rich, over 50's who take regular breaks. They want city, rural and coastal breaks in 3star + accommodation. They enjoy good restaurants and famous attractions. They respond well to mid week and off season offers. This segment offers the biggest opportunity, accounting for 45% of NI's best prospects
- **Couples** are cash rich but time poor. They are over 25's without children. They choose destinations yet to be experienced by their friends. They want 4star + hotels with leisure/spa facilities, famous attractions, stunning scenery and shopping. Under 34's account for almost one third of recent visitors and over one in four of those considering NI
- **Families** - it's all about catering for the children and value for money. They travel at weekends and during school holidays. They are strapped for time and prefer locations that are easily accessible. They want child friendly accommodation, activity rich destinations and all inclusive packages

+ Accentuate the positives

According to recent research, 1.2m ROI adults stated that they would 'consider' a leisure visit to Northern Ireland in the next two years and approximately 450,000 are very interested in visiting.

The potential for Northern Ireland has been greatly influenced by the large number of shopping trips, which has provided an actual experience of NI, albeit a functional visit.

A series of focus groups were conducted with ROI residents in early 2009 and found that the perceptions of Republic of Ireland residents on taking a short break in NI have improved over the past 2 years. Most significant have been:

- The shift in value for money with over 3 out of 4 acknowledging this (compared to less than 1 in 3 in 2007). This suggests that it's value all the way, with the weak Pound presenting a major talking point and a real reason to visit NI

- Belfast is a 'must visit city' for over half. It is developing its own identity. It is seen as emerging, vibrant, modern yet with a rich sense of heritage. It is seen to be on the cusp of great things
- Over 1 in 2 now perceives the welcome in NI to be 'warm and welcoming'
- Other influencers including, 'easy to get to', 'lots of things to do and see' including 'unique visitor attractions', have all moved in a positive direction

- Challenge the negatives

Awareness of NI as a holiday destination remains low with the exception of Giant's Causeway; The Mournes; and Belfast. However, the Lonely Planet Guide recommendation has had a positive impact.

There is a general softening towards NI and combined with the strong value positioning, the ROI is much more open to at least considering holidays in NI. In terms of NI as a whole, the future looks equally bright.

There is a sense that NI is not as commercial or crowded as the ROI. The landscape and scenery are unspoilt. NI is viewed as a relatively new, undiscovered place.

"No conference centres bolted on to country houses."

SOURCE: ROI FOCUS GROUP RESPONDENT

However, for some the fear factor still exists. Coupled with a lack of knowledge on what there is to do in NI, this presents a real barrier to holidaying in NI.

"You could very easily drive into the wrong area. I don't think I would know where to go if I was to go there for a short break to be honest. "

SOURCE: ROI FOCUS GROUP RESPONDENT

Many perceive the quality of the experience, particularly outside of Belfast, to be inferior and have doubts as to whether the experience would be sufficiently differentiated from other parts of Ireland.

5.3 Great Britain

A giant on our doorstep

GB is NI's second biggest source of visitors; just behind the domestic market. However, it generates the largest amount (40%) of NI's total tourism revenue.

In 2008, we welcomed 1.2m visitors from GB; who spent £217 million in NI. 2008 saw a slowdown from GB, however England and Scotland continue to be key markets for NI in terms of current business and growth potential.

Competition in GB is fierce, NI is on its doorstep and for this reason has competitive advantage. Air and sea access to NI is direct and inexpensive. We must aggressively market NI as a short break destination to achieve the growth potential.

5.3.1 Great Britain visitors to Northern Ireland

Who are they and what are they looking for?

GB visitors to NI increased significantly from 1995 to 2005, however from 2005 there has been a sustained downturn. The majority of visitors come to visit friends and relatives or for business reasons. We must highlight NI as a standalone destination of choice, otherwise it will be difficult to grow this business.

There are real opportunities to grow our share of the holiday sector in line with the profile of GB visitors to ROI which represents almost 50% of GB visitors to ROI.

Eurozone destinations are increasingly expensive for GB and NI, as a member of the Sterlingzone, has a short term competitive advantage over ROI.

Broadly speaking they are **over 45, sightseer and culture seekers** from England and Scotland who are cash and time rich and take multiple breaks. In the main, they choose NI as it is convenient and easily accessed. They are motivated by NI's inspiring scenery, pub culture and first time visitors are curious about NI's living history.

Predominantly they visit between April and September with a large proportion bringing their own car. Staying in all types of accommodation from budget hotels to guesthouses they enjoy good restaurants, famous attractions, historic properties and local hospitality and entertainment.

Internet planning and booking is now the preferred route.

+ Accentuate the positives

GB visitors want to experience the local and the authentic and NI has this in abundance. Celebrate local food and culture and tell the story of your place - that's what will get you to stand out from the competition.

Euro-zone destinations are increasingly expensive for GB and NI residents – this then gives us a short-term competitive advantage over ROI as a destination.

- Challenge the negatives

Awareness of NI is still very low, with just one third of GB residents knowing what there is to do in NI. Use every means possible to give potential GB customers a flavour of your place. Sample itineraries are a great way of sharing the quality and proximity of unique experiences.

Internet searching, planning and booking is vital for this target audience, particularly for accommodation providers – if you do not have it expect this audience to pass you by.

6. NOW, BACK TO THE FUTURE

The competition for short breaks is perhaps more intense than at any time in the recent past as operators attempt to fill available capacity.

Value will be key with the relative strength of the euro further boosting the attractiveness of travel to the sterling area.

Irish residents are projected to cut the number of trips by at least 10% this year. However, early indications are that the average expenditure on travel will fall more sharply, while the pattern of trips – the number, duration, destination and level of expenditure will show some marked changes.

Based on the economic forecasts for 2010 the market is most unlikely to return to growth before 2011 or 2012, although there may be some market share shifts between domestic and abroad leisure travel.

Despite the overall market environment, Northern Ireland could gain share and increase the absolute level of visitors from the domestic market, Republic of Ireland and Great Britain based on the twin appeals of value and novelty/difference.

6.1 What does the future hold?

- **Holidays are no longer a luxury** - according to Mintel, Irish consumers are less likely to cut back on taking holidays opting instead to cut back on eating out or buying new clothes.
- **The budget and luxury sectors are growing** as people are looking for a holiday that combines both: budget accommodation with expensive restaurants etc
- The **'search for the authentic'** is a top trend and people are more attracted to a unique experience within a destination rather than just the destination itself
- **Value for money** is increasingly important.
- People are becoming much more **concerned about the environment**
- The world is **getting older**
- People are becoming **more sophisticated**, with more demands and more time pressures. They want to differentiate themselves by learning new skills
- There is growing concern for **health and wellbeing**
- **Technology is changing** the way people plan and book holidays
- **Increase in staycations** - staying at home, relaxing or taking day trips
- **Rise of 'Palidays'** - 45% of families claim to spend less than £600 in 2 weeks when holidaying with friends and family, a saving of 77%
- **Nano Breaks** - an increasing number are booking one-night breaks this year

Tourism is constantly evolving. To keep up with trends in the tourism world, look out for NITB's new monthly ezine 'Spotlight'.

7. TYPES OF SHORT BREAKS

Broadly speaking, the segmentation of the short break market (by motivation and characteristics) can be broken down as follows :

MOTIVATION	WHAT THEY ARE LOOKING FOR	WHO THEY ARE	KEY MESSAGES
Buzz & Craic	Nightlife, entertainment, pubs, clubs, restaurants, vibrant atmosphere.	Predominantly pre-family consumers.	Cities are on the up.
City Culture	Cities with noted cultural themes and connections; history, architecture, museums, galleries, etc.	Couples across all life stages <ul style="list-style-type: none"> • Pre family – couples, romantic break. • Family – partner, time away from kids. • Empty nesters. 	Romantic and partner breaks.
Countryside Culture	Rural breaks with relaxed laid back feel and sights/ locations to see: folk parks, beautiful scenery, coastlines, castles etc.	Couples/partners across most life stages <ul style="list-style-type: none"> • Pre family – couples, romantic break. • Family – partner, time away from kids. • Empty nesters - tend to account for a sizeable share of this segment. 	Time away together to enjoy something different. Stunning scenery.
Hotel Breaks	Destination hotels where kids are specifically catered for, and adults can 'take a break' from the kids.	Families Resort hotels offering a range of recreational activities and facilities tend to have a high appeal for families, although not exclusively so. Destination hotels where kids are specifically catered for, and adults can 'take a break' from the kids.	Family holidays are less top of mind – parents may want to sample NI first.
Themed Breaks	Cultural and sporting events Concerts: international acts in large arenas.	Pre – family – group orientated. Family – increasingly all family, bring kids to a targeted event. Empty nesters – group orientated.arenas.	Belfast is a major strength, particularly the Odyssey and Titanic Quarter.

8. A FEW SUGGESTIONS

Don't forget that Northern Ireland is not the only destination on consumers' consideration lists.

Awareness of what NI has to offer is low and we need to give people reasons to come to convert interest into real bookings.

Make it easy for visitors, know what's on in your area to make a 'might visit' a 'must visit'.

8.1 Know your customer

Know your customer. Know their life cycle. If they don't have children at home they'll be more likely to be able to holiday during the week and out of season.

People are living longer and are generally in better health. Be prepared to meet the needs of growing numbers of older visitors and probably less able people.

8.2 Internet rules

Make sure that you understand the technology that your customers are using and find ways to use it too. Consumers turn to the web with social networking and peer reviews being today's 'word of mouth'.

8.3 Tell your story

Get to know your local media. Don't underestimate the importance of media and having a good media profile.

8.4 Value is key

Visitors may still choose a first class experience over budgeting.

Rather than simply cut prices, target relevant customers with mid-week or Sunday night free offers that fit with your business model. Heavily promoting the amenities available (i.e. spas, bar, etc.) or proximity to city centres or heritage sites. Visitors do not necessarily want 'cheap', but rather value for money.

8.5 Value your visitor and they will value you...

The key to long term growth for NI short breaks will be encouraging repeat visitors by providing a top quality service and a memorable break. Some 38% of NI and 41% of ROI consumers claim that they like to go back to familiar places on short breaks.

Make sure your database is squeaky clean and know what's on in your region. Keep in touch with previous visitors and give them reasons to return: birthdays; anniversaries all provide great opportunities and will make your customer feel valued.

Use Northern Ireland's events' programme to your advantage to develop theme breaks to encourage repeat visits.

Make NI consumers aware of upcoming bank holidays or statutory days off work.

Remember that ROI bank holidays are different to NI's, so don't forget to target them when you have availability and they have the time.

2.5 million ROI residents came to NI to shop in 2008. That's 40% of residents living close to the border and 30% of Dubliners. Only a small percentage stayed overnight. Make today's day tripper tomorrow's short breaker by offering 'the total shopping experience'. Shopping centre promotions are great tactics to encourage repeat shoppers to stay with you!

8.6 Celebrate YOUR authenticity

Make sure that you tell your story to help visitors choose you. Tell visitors what's unique about you. Even better let them experience it. If you have a unique recipe, share it on your menu.

Get in on the act. NI has an abundance of festivals celebrating all that is unique and special. In May 2009, the North West 200 racing bike tournament, attracted somewhere in the region of 150,000 visitors to the North Coast region of NI and it is estimated that the Tall Ships event generated in the region of £20m!

Develop and promote your off season festival breaks. Visit discovernorthernireland.com to download NI's events' calendar.

8.7 Work together

Make life easier for yourself by working with others. NI's carriers; tour, bus and rail operators; Tourism Ireland and NITB are aggressively promoting NI. Get in on the act by developing targeting offers to underpin these multi-million pound campaigns and close the sale.

8.8 Be brave – get feedback

Tourism is evolving every day. Stay on top of your game by asking your visitor how their experience with you stacked up against their expectations and against their previous holiday experiences. Don't be afraid to ask them how you could improve the experience you provide and when you've made these changes, be sure to invite them back to enjoy the improvements!

With a shared approach across the industry we can continue to build a confident, forward-looking tourism sector.

Success is within our reach!

Sources of information

The information contained within this document is based on data from the following sources:

- NITB's 2009 Strategic Review of the Island of Ireland. To review the summary document please visit nitb.com
- Northern Ireland Tourist Board's Passenger Survey
- Northern Ireland Tourism Strategy working paper, 2009
- Failte Ireland's Survey of Overseas Travelers
- CSO's Country of Residence Survey
- CSO's Household Travel Survey
- United Kingdom Tourism Survey
- Mintel - Short Breaks report, July 2009

Definitions

domestic tourism

Domestic tourism is defined as the activities of Northern Ireland residents travelling to and staying overnight in places within Northern Ireland but outside their usual environment.

a visitor

Any person visiting and staying for at least one night in Northern Ireland - for any reason other than following an occupation remunerated from within the country - any country other than that in which he/she has his/her usual place of residence.

overseas visitor

Overseas visitors include GB visitors and all other visitors from outside the island of Ireland.

out of state visitor

Out of state visitors are defined as overseas visitors (including GB) plus visitors from the Republic of Ireland.

Every care has been taken to ensure accuracy in the compilation of this paper. NITB cannot accept responsibility for emissions or errors but these will be rectified in future publications when brought to our attention. Please direct any queries to v.mccabe@nitb.com



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