



Power up for Autumn Industry Webinar

18th September 2025

WELCOME.

Carmel Scott

Head of Marketing, Tourism NI

Agenda.

- Autumn Campaign Overview
- Industry Toolkit
- Marketing Opportunities
- Industry Development Update
- Q&A

Campaign Overview.

- Key Research Insights
- Target Audience Segments
- Campaign Timings
- Channel Strategy

Ruth Burns

Marketing Manager, Tourism NI


Economic Context to the Campaign

Market Performance: ROI domestic travel is strong, but ROI-to-NI trips in 2024 declined vs 2023 (though above 2022). Happily for the first half of 2025 overnight trips from ROI to NI **have increased by 15%**.

NI domestic performance 2024 was down quite significantly but early indicators are showing a more positive performance for 2025

Competitive Landscape: Tourism brands invested heavily in ROI in 2024, with total spend exceeding **£66.6m**. Press, digital and OOH dominated the mix, with OOH investment alone up 35% year-on-year. This means the ROI market is still extremely competitive and much more expensive than NI media.

Economic Pressures: Rising cost of living and reduced disposable income are impacting travel choices; NI's historic value-for-money edge is narrowing.



Travel Trends: Shorter planning windows (often <3 months), increased interest in sustainability, AI, accessibility, and unique cultural experiences.

Media Environment: Digital and streaming platforms are gaining reach but offline channels remain critical for awareness.

Weather & Seasonality: Poor summer weather in 2024 impacted domestic tourism.

Consumer Sentiment in ROI Market

- Tourism NI's consumer sentiment research, undertaken in **March / April 2025**, indicated continued strong ROI visitor volumes for the opening quarter of this year.
- The vast majority of ROI visitors said their trip exceeded or matched expectations, with the iconic/world-renowned attractions, range of places to eat & drink and scenic/interesting walks being particularly highly rated.
- The research also indicated that ROI intentions for taking both day trips and short breaks in NI over the summer months, remained strong.
- While cost-of-living is still a concern for many ROI consumers, encouragingly they continue to regard NI as better value for money than GB and ROI. Very important that we push the value message in our advertising.
- Key motivators for ROI consumers are to have fun, to relax and to escape & get away from it all.

Consumer Sentiment in NI Market

- Tourism NI's latest consumer sentiment research also indicated continued strong domestic visitor volumes for the opening quarter of this year.
- The vast majority of domestic visitors said their trip exceeded or matched expectations, with interesting/scenic walks, outdoor sport & activities and iconic/world-renowned attractions being particularly highly rated.
- The research also indicated domestic intentions for taking both day trips and short breaks in NI over the summer months, remained fairly strong but has softened compared to when this research was conducted in 2024.
- To relax, to spend time with friends & family and to escape & get away from it all are key motivators for intended NI trips for domestic consumers.
- While cost-of-living is still a concern for many NI consumers, they continue to regard NI as better value for money than GB and ROI.



Autumn 2025 Campaign Overview



Who are we targeting?

N market segments

Priority Segments

Aspiring Families 30%

- Active families
- Strong family focus
- Activities very important (all types, variety of interests)
- Need activities to suit children/suit whole family
- Planners
- Pay attention to price, seeking value, bargain

Demographics

Most likely 35-44, even social class split, have younger children (under 16)



£ 1,360
Estimated spend

Naturally Quality Seekers 15%

- Natural Quality seekers
- Quality of accommodation important
- Nature lovers, outdoors
- Sustainability important
- Enjoy planning, clear itineraries
- Short breaks important part of their lives
- Preference for gentle activities

Demographics

Older (av. age 55) more likely to be male, ABC1, older kids



£ 1,238
Estimated spend

Social Instagrammers 15%

- Buzz and atmosphere seekers
- Seeking nightlife, great pubs etc.
- More likely to use AirBnB
- Short breaks important part of life
- Want to broaden the mind
- Connectivity very important (Wifi, 4G)
- Getting a good deal and engaging in activities deemed more important than finding great accommodation

Demographics

Youngest segment, more likely to be female, Slight C2DE bias, Least likely to have kids



£ 1,006
Estimated spend

ROI market segments

Priority Segments

Active Maximizers 33%

- Seek great destinations
- Travelling as couples but also as young families - 57% will have young children
- Seeking energetic experiences and unpredictability
- Buzz and atmosphere seekers
- Quality of accommodation important
- Enjoy planning and like to have clear itineraries
- Short breaks important part of their lives
- Share their experiences on social channels

Demographics

Most likely 30-40, even gender split. Low spending. Likely to have younger children (under 16)



£ 871
Estimated spend

Indulgent Relaxers 11%

- Intention to visit in the short-term
- Looking to indulge and spend quality time with their partner
- Most likely segment to take a 'romantic' break as their next break.
- Nature lovers, enjoy the outdoors
- Interested in shopping opportunities
- Enjoy good food and music
- Seeking luxury accommodation, large comfortable rooms
- Not afraid to pay for quality if it's worth
- Short breaks important part of their lives

Demographics

Most likely 40-50, more likely to be female. ABC1, older kids.



£ 1,013
Estimated spend

Open Minded Explorers 15%

- High medium-term intention to visit
- Nature lovers, enjoy the outdoors
- Quality of accommodation important, space and comfort
- Food very important and highly motivating for them
- Want to engage with local people
- Motivated by culture, food and unique experiences
- Planners - do a lot of research
- Conscious of value for money and, in particular, safety

Demographics

Older (45-54), more likely to be female. ABC1, older kids.



£ 924
Estimated spend



When are we live in
market?





GO LIVE DATES

**NI – 22nd September to
10th November**

**ROI – 22nd September to
17th November**



How are we targeting
each market? – Channel
Strategy

TV – RTE the most popular station in ROI - we are running a 4 week campaign – we will reach **1,482m adults** 70% of the target audience.

40% of our audience live in a Sky household with history, culture and arts their passion points so we have a Sky partnership with ‘first in break’ positioning across Sky in October

VOD – we will appear on RTE player and Virgin media player reaching +**50%** of the OME audience



OOH – high impact digital galleries in commuter hubs In Connolly, Pears Street and Tara Street stations with a combined footfall of over **1.1m** every 2 weeks

RADIO – we are targeting the 2 leading OME national stations – Newstalk and Today FM combined weekly reach of **+1.7m**

PRINT – we will have a series of regional specific advertorials with the Irish Times, Irish Indo and Daily Mail group reaching over **900K people**

Embrace a Belfast City Escape

Belfast is a big, bustling, friendly city with an atmosphere all of its own. From the colourful cobbled streets of the artistic Cathedral Quarter, to the shopping districts around Victoria Square and beyond to the spectacular slipways and docks of the Titanic Quarter, you'll find a welcoming city brimming with culture and history, with a huge range of accommodation options and a truly vibrant food and drink scene.

Titanic Belfast
Make the Titanic Belfast visitor experience your first port of call in Belfast! Immerse yourself in the story of the iconic ship, precisely where it was built. With a recent refresh and four new galleries to explore, there's never been a better time to visit.

Colin Glen
It's hard to believe this magical 200-acre forest park is tucked away just minutes from Belfast's city centre. Colin Glen is brimming with natural beauty and trails to explore, but if you want the whole-stop tour, you're in luck! The Glen is home to Ireland's first Alpine Coaster and two dual ziplines, giving you mind-blowing views of the forest park, Belfast city, and beyond. The River Staid is Ireland's longest zipline, and definitely not for the faint of heart.

Bullitt Hotel
Situated in the heart of the city, Bullitt Hotel offers a vibrant and eclectic atmosphere that goes far beyond a place to stay for the night. Enjoy a delicious meal at Taylor & Clay, unwind with a drink in the Courtyard bar, or take your night to the next level at Tella, the hotel's rooftop bar.

Explore a history of conflict and peace
Belfast experienced its share of the conflict known as The Troubles from the 1960s to 1990s, but the city also flourished with the healing and reconciliation of the subsequent Peace Process. Hear first-hand how the Troubles affected the streets of Belfast during DC tours' 'History of Terror' walking tour, or explore the once-fortified spaces of the now-decommissioned Crumlin Road Gaol, Northern Ireland's only remaining Victorian-era prison.

Victoria Square Shopping Centre
Welcome to a piece of retail heaven. Victoria Square Shopping Centre is famous for the panoramic view from its rooftop glass dome, and it's under the dome that the retail buzz really gets going with over 50 famous high street names and countless food and drink options.

A taste of Belfast
Belfast's bustling bars, cafes, food courts and restaurants offer something to delight every palate, and pocket. For a taste of the city's best street food, head to the lively Common Market, where you'll find it all under one roof. Enjoy a bespoke dining experience at The Dry Brasserie Belfast, where you can savour relaxed yet sophisticated all-day dining in stunning surroundings. At James St, the spotlight is on the charcoal grill, with a kitchen renowned for its exquisite dishes crafted from local ingredients. Finally, take your taste for cocktails to new heights at The Observatory, perched 22 floors above the city in the Grand Central Hotel and sip the evening away as the sun sets over Belfast.

NI Science Festival 12-23 February 2025
With over 250 events across 50+ venues, the NI Science Festival offers a stimulating and wide range of events focussing on the wonders of science, technology, engineering and mathematics.

Getting to and around Northern Ireland is easy
From anywhere in Ireland you're just a few hours from a great adventure. Taking a train is the easy, affordable and sustainable option, or just pack your car. James also offers you Belfast's ultimate Northern Ireland playlist, and off you go.

Book your next short break now at discovernorthernireland.com

Northern Ireland **Embrace a Giant Spirit** **Belfast**

THE IRISH TIMES

newstalk **TODAY fm**

Irish Independent



TV – UTV 6 week campaign targeting the NQS audience
68% of whom watch UTV every week, supported by Sky
Adsmart reaching almost **200k homes** across NI and
VOD on ITVX.



OOH – our OOH will build awareness and
frequency with the Adshel live and billboard live
networks nationwide (**200+ panels**), as well as
30 handpicked 48 sheet sites across NI





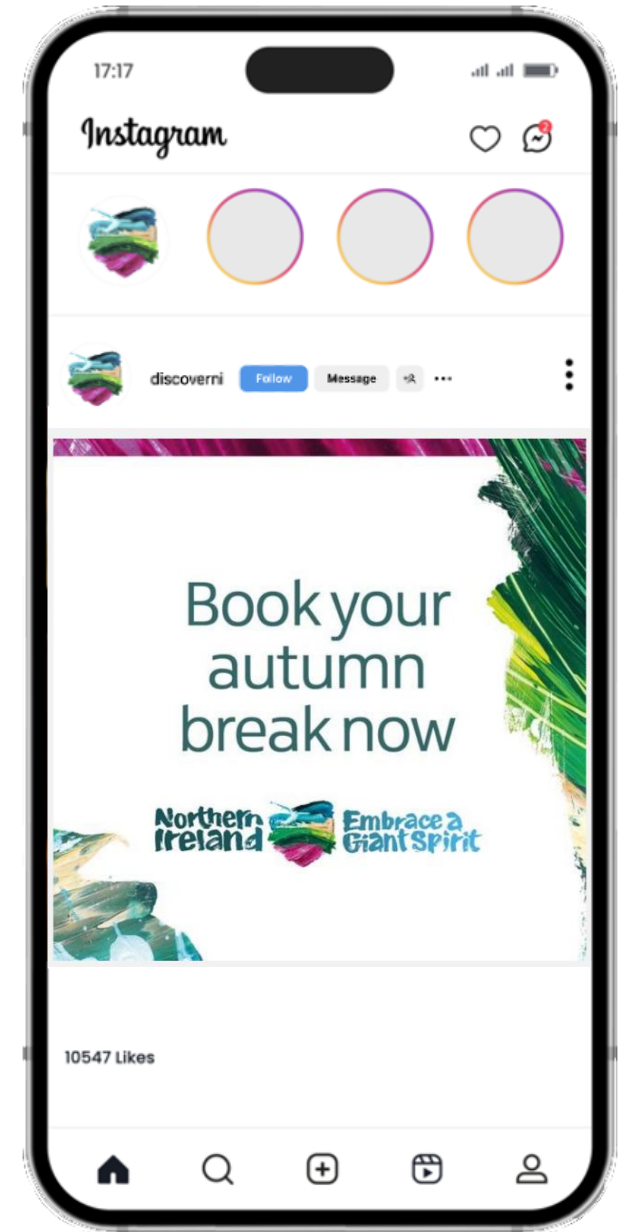
RADIO – our bespoke ‘Autumn adventures’ radio initiative with Downtown, Downtown country and greatest hits radio is a series of 40 second ads showcasing events, attractions, and accommodation providers. Cumulative reach of this is **528,000 NI consumers**

PRINT – we will have a series of regional specific advertorials in the Belfast Telegraph, Daily Mail, Mail on Sunday and NI4 kids providing inspirational travel content for the NQS audience – combined reach of over **400k consumers**



Digital & Social Channels

- The Autumn digital campaign will utilise a range of brand video assets and lo-fi UGC/influencer content as well as carousel and static image formats across Meta, YouTube, Programmatic Video, Display Retargeting & Google Search Ads.
- This will be underpinned by paid and organic activity across Facebook & Instagram, with a combined organic audience of over 300k. We will also use travel and lifestyle influencers to help us reach the market segments aligned to our campaign activity.
- Email Marketing will be utilised to communicate autumn offers and offer inspiration on where to stay, what to see, and what to do in Northern Ireland. The call to action will connect visitors to our website, www.discovernorthernireland.com, to plan their trip.



Regional Rotation

- Regional rotation is where we home in on specific regions so that a spotlight is shone on one particular area for a full week.
- If you were thinking of doing some of your own activity, this is your perfect opportunity to advertise in an already fertile marketplace.
- This means that one press ad of your own, for example will have much more traction in the market against the backdrop of the TNI campaign, than advertising on your own.
- **All our channels** will focus that week on one particular area so it's a great opportunity to grow your business for autumn.

Causeway Coastal Route - w/c 22nd Sept



Fermanagh & Tyrone - w/c 29th Sept



Derry~Londonderry - w/c 6th Oct



Mournes & Strangford - w/c 13th Oct



Armagh & Down - w/c 20th Oct



Belfast - w/c 27th Oct



All activity will be underpinned by a comprehensive PR strategy in NI & ROI

- **Fam trips**
- **Press releases**
- **Competitions**
- **Media relations activity**

Get Involved.

- Embrace a Giant Spirit – Brand Book
- Autumn Industry Toolkit
- Industry Templates
- Marketing Opportunities

Catherine Kelly

Social & Digital Manager, Tourism NI

Brand Book – Embrace a Giant Spirit

When we work together, our content is much more impactful.

Download the [Awakening our Giant Spirit Brand Book](#) and find out more about unlocking Northern Ireland's Giant Spirit.



Autumn Industry Toolkit

A supporting toolkit will be available after the session, providing all the assets you need to leverage the campaign and help attract more visitors.

[Marketing Campaign for Tourism in Northern Ireland](#)



Industry Templates - Get Involved in Our Marketing Campaign!



Boost your visibility by incorporating our ready-to-use social media templates into your own marketing activity. Whether it's for stories or your feed, these assets make it easy to showcase your special offers and promote great value for money this autumn.

Tailor Messaging Using Research and Insights

Maximise the results of your content by ensuring that it is underpinned by research and insights.

Segment

Travel intentions

Travel behaviours

Market trends

Keep the audience motivations in mind; Both audiences care about Value for Money. ROI audiences are motivated by fun and excitement & NI audiences are driven by the desire to relax and unwind.

Tailor your messaging accordingly & tag us [@discoverni](#) to create engaging content on your own channels that we can curate and share.

Research & Insights



ALL SECTORS

Consumer Sentiment Analysis

[Read more >](#)



ALL SECTORS

Tourism Industry Barometer



ALL SECTORS

Tourism Performance Statistics



ALL SECTORS

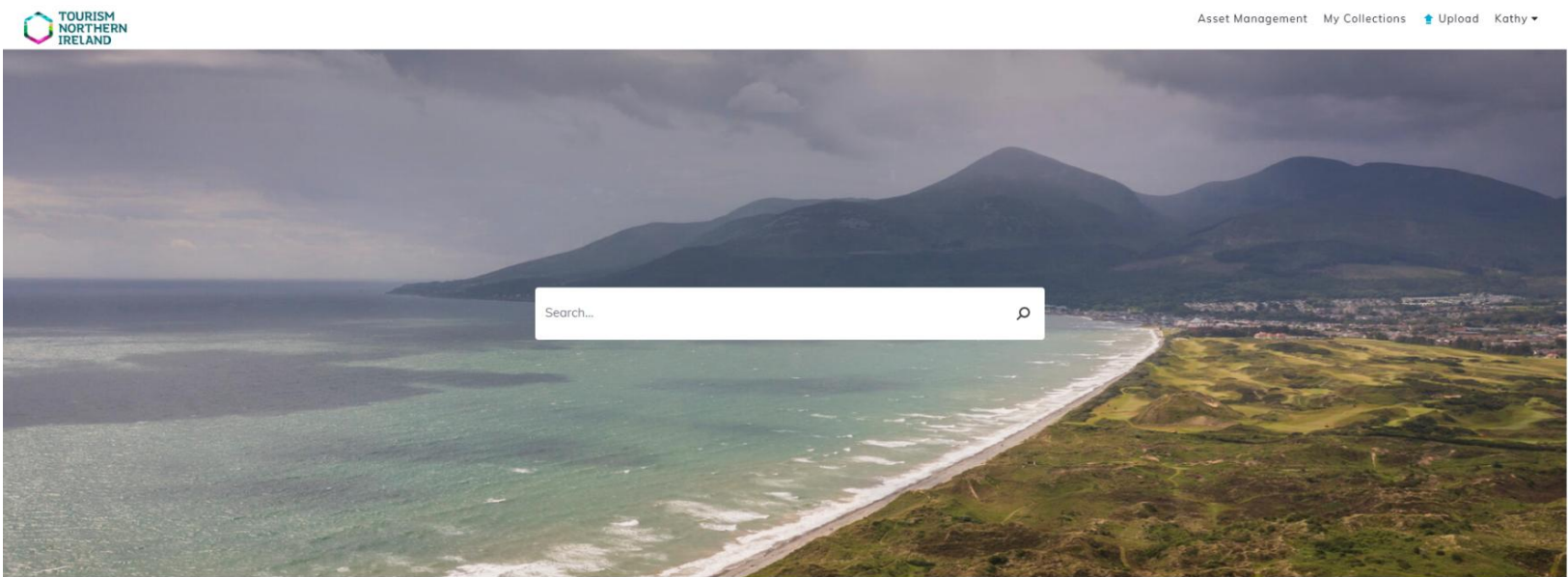
Tourism 360°

[Tourism Statistics, Research & Insights | Tourism NI](#)

Content Pool

Due to the upcoming Content Pool Migration, the Autumn Campaign assets will be available at [this publicly shareable link](#).

Need Help? Contact:
Kathy Wilford – k.wilford@tourismni.com



Featured Collections



Beautiful Landscapes

Derry-Londonderry and Strabane

Autumn Campaign 2025

Peace Tourism

[Northern Ireland's Content Pool.](#)

Content Calendar

Please share your content with our social specialist Victoria by tagging
@discoverni or **#embraceagiantspirit**
or contact Victoria Mc Murray: **v.mcmurray@tourismni.com**

	2025			2026		
Content Theme	Oct	Nov	Dec	Jan	Feb	Mar
Brand Campaigns	Autumn Campaign (launching 22nd Sep - 9th Nov) 6x Regional weeks		n/a	Spring (launching 26th Jan - 31st Mar) 6 x Regional weeks		
Seasonal	Halloween Autumnal Short Breaks	Christmas Countdown	Christmas / Festive	New Year Resolutions	Valentines Theme - Love Northern Ireland	St Patrick Theme Easter Promotion (Easter Sunday 5th April)
Events / What's on	Events and What's on Guide	Events and What's on Guide	Christmas Events & Winter Festivals	Events and What's on Guide	Events and What's on Guide	Events and What's on Guide
Tactical	Peace Tourism School Mid Term Break Inspiration ROI Bank Holiday 27th October	Spa Breaks - Indulgent Relaxers	Giftcard and Christmas offers	Peace Tourism (Phase 2: Jan-Mar)	School Mid Term Break Inspiration	Mother's Day
Industry Development / Experiences	Food & Drink Month	Historic Houses - Christmas	n/a	Signature Walks	n/a	Blueways / Greenways
Sub Themes	Sustainability / Train Journeys Food & Drink Autumn ASMR	Retail and Hospitality	Retail and Hospitality Winter Walks	Wellness What's New for 2026 Sustainability	Sustainability	Sport Theme

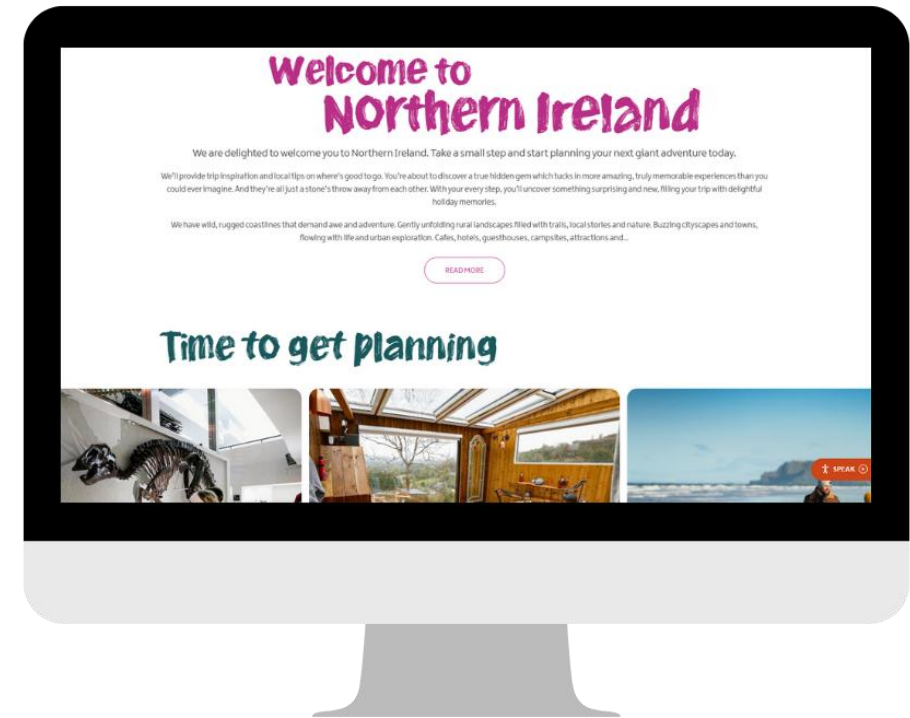
Any attraction, experience or certified accommodation that wishes to be promoted by Tourism NI must have a free Discover Northern Ireland website listing.

The website listings are used to inform a range of content outputs including events and seasonal offers so make sure that all your listings are up to date.



DISCOVER NORTHERN IRELAND WEBSITE PRODUCT LISTINGS – TOP TIPS

1. Create a listing by following the ‘Sign up’ link on **Tourismni.com.**
2. Update your listing regularly – at least twice a year
3. **Add event listings too** as these are promoted by Tourism NI across their marketing channels.
4. Add up to 9 photographs to your listing, which accurately & positively reflect the visitor experience.
5. Add a description of your experience to give potential visitors an idea of what they can expect to see / think / feel / hear / taste.
6. Also detail who the experience is suitable for – **align with our customer segments.**
7. Include helpful details, including transport and parking information, facilities available and insider tips.
8. Include contact information, including a contact email, web URL and booking details.
9. **Check Google Search** for FAQs to address within your listing description (the “People Also Ask” suggestions).



Top 4 Things To Do Today

1. Create or update your Business/Event Listing on the Discover Northern Ireland website.
2. Download and use our Autumn Campaign Photography, Social Media Templates and Embrace a Giant Spirt brand book.
3. Support the campaign by liking, sharing, and commenting on our social media posts. Every interaction helps extend our reach and showcase the best of what we have to offer this season.
4. Share an Autumn offer! Use our templates and don't forget to tag us [@discoverni](https://www.discoverni.com) or use #MyGiantAdventure when posting on social media so we can amplify your content through our channels.

Industry Development.

- Upcoming Industry Opportunities
- Tourism and Hospitality Collaborations
- E-Learning - MyTourismNI

Carolyn Boyd

Industry Development Manager, Tourism NI



We are part of

Tourism & Hospitality Week 2025

23rd September - 1st October 2025

For full details and to download toolkit visit tourismni.com/tourismhospitalityweek

Upcoming Tourism NI Industry Opportunities

Open for registration now:

- **The Future of AI in Tourism – Industry Webinar**

Tuesday 7th October – Online Webinar

Coming soon:

- **Inclusive & Accessible Tourism – Industry Update**

Thursday 23rd October – Dunadry Hotel and Gardens

- **Sustainable Tourism – Industry Update**

Provisionally Tuesday 13th November – Full details to be confirmed ASAP.

- **AI in Tourism Webinar Series**

Sessions across November, January and February to complement new E-Learning Modules

For full details and to register for live events, or to view recordings from previous events and webinars, visit: **tourismni.com/ted**

Tourism and Hospitality – Upcoming Collaborations



MyTourismNI

- A dedicated free E-Learning platform for NI tourism and hospitality businesses.
- Specially developed to support the industry to build expertise, knowledge, competence and confidence.
- A range of learning modules across Sales and Marketing, Digital, Sustainability, People, Operational Effectiveness and more.
- New modules regularly released.
- Get started now at MyTourismNI.com
- To find out more visit tourismni.com/MyTourismNI



The screenshot shows the homepage of the MyTourismNI website. At the top is the Tourism Northern Ireland logo and a navigation menu with links: Home, Getting Started, Dashboard, Courses, Media Assets, FAQ's, Contact Us, and a Login button. The main banner features a scenic image of people on a rocky coastline with the text "MyTourismNI - it's time to Learn" and a sub-headline "Unleash your tourism business's potential with Tourism NI's new e-learning platform for Northern Ireland's thriving industry." Below this is a search bar with the placeholder text "What do you want to learn today?" and a "Search" button. The section "Our new e-learning platform" includes a video player with a play button and the text "CLICK HERE TO PLAY VIDEO" and "Carolyn Boyd, Industry Development Manager". To the right of the video, text reads: "Tourism NI presents MyTourismNI. Tailored for Northern Ireland's tourism and hospitality, master marketing, digital ops, and sustainability. Access support, improve your brand, and get listed on Discover Northern Ireland. Learn at your pace, earn badges, and boost your business on social media. Join Carolyn on your learning journey." Below this is a section titled "Courses by topic" with a "Getting Started" button. The courses are categorized into six pillars: People, Digital, Sustainability, Sales & Marketing, Operational Effectiveness, and NI Embrace a Giant Spirit.

TOURISM NORTHERN IRELAND

Home · Getting Started · Dashboard · Courses · Media Assets · FAQ's · Contact Us · Login

MyTourismNI - it's time to Learn

Unleash your tourism business's potential with Tourism NI's new e-learning platform for Northern Ireland's thriving industry.

What do you want to learn today? Search

Our new e-learning platform

CLICK HERE TO PLAY VIDEO

Carolyn Boyd
Industry Development Manager

Tourism NI presents MyTourismNI

Tailored for Northern Ireland's tourism and hospitality, master marketing, digital ops, and sustainability. Access support, improve your brand, and get listed on Discover Northern Ireland. Learn at your pace, earn badges, and boost your business on social media. Join Carolyn on your learning journey.

Courses by topic

Our courses are categorised into pillars of learning.

Getting Started

People **Digital** **Sustainability**

Sales & Marketing **Operational Effectiveness** **NI Embrace a Giant Spirit**

Thank
you.

Q&A.

The background is a photograph of a forest in autumn, with trees having yellow and orange foliage and a ground covered in fallen leaves. On the right side, there is a large, vibrant, abstract splash of colors including blue, green, and pink, resembling a liquid or paint effect.

Power up for Autumn Industry Webinar

18th September 2025