Contents

Setting the scene
   What can the Intelligent Perspective Series do for me?

1 A new approach – Experiential Tourism
   What does Experiential Tourism mean for Northern Ireland?
   Competition vs. collaboration
   Why we need to cluster experiences around our best assets
   Does a visitor see the difference between a ‘product’ and an ‘experience’?
   Who is doing experiential tourism well?
   What part do you play?
   How can you help drive change?

2 Bringing Experiential Tourism to life for our visitors
   How are we shaping up today in Northern Ireland?
   World trends – what people are looking for
   How to give visitors what they want
   How to use Northern Ireland’s Five Experience Themes
   Understanding Northern Ireland’s visitor segments
   How can you help drive change?

3 What to expect in the new Intelligent Perspective Series

4 Get involved!
   How can WE drive change?
Tourism, by its very nature is an experiential business – whether you are visiting an area for the first time, trying a new sport, marvelling at the view from the top of a hill, trying some strange local culinary creation or just hearing an old story told in a different way. This is the business that every tourism destination is in – whilst at the same time, always striving for new ways to differentiate and stand out from the crowd.

In Northern Ireland, we have a huge opportunity to align ourselves competitively with other similar destinations and to bring alive our most unique and distinctive assets. We know more about our visitors than ever before and we also know what they think of us. Now is the time for everyone to work together to develop our tourism experiences around our visitors needs and motivations to encourage them to stay longer, spend more and return again and again.
What can the Intelligent Perspective Series do for me?

The Intelligent Perspective Series has been developed to inspire everyone to take the next step along the road of our experiential tourism journey, which was kicked off with the launch of the ‘Creating Experiences Toolkit’, in March 2013. The series of guides is designed to be a practical resource and one that is full of tips, insights and others’ experiences to support and learn from.

The first report of the series, this overview report, sets out to inform, align and support everyone to better understand experiential tourism and the benefits it could bring to Northern Ireland (NI). It is also to encourage a greater sense of joined-up thinking and innovation around how we develop experiential offerings. We need to create a common understanding of where we are today so that we can work together to create a compelling and clear vision of tomorrow.

Based on insights and best practice from other destinations, as well as NITB’s ‘Priorities for Growth’ report and the ‘Creating Experiences’ Toolkit, this report will look at what experiential tourism is, and equally what it is not – in a NI context. We will refer to the Experience Pillars and the visitor segmentation work to understand how best to develop a ‘cluster approach’ to tourism development and why this is ideal for NI.

Many countries across the world are now looking to how they can create a more experiential offering for visitors. Some have opted for a Destination Development approach which is ideal when they have strong regionally clustered product. In NI our best assets are clustered around themes and products so it is for this reason that we know our best opportunities lie in adopting a ‘clustered approach’ to develop better visitor experiences. This is why we have developed our five Experience Pillars.

It may also be that some of these Experience Pillars don’t fit for a specific area – and that is to be expected. This approach needs to be tailored and made locally relevant for visitors and businesses alike.

This is a new way of developing tourism for us and requires a shift in thinking and priorities. Many others have embarked down this path before us and so there is best practice out there and experience that we can learn from.

Finally, this report will summarise what to expect in the other five guides in this series.
Intelligent Perspective overview report

This report provides a deeper understanding of Experiential Tourism and how to do it in NI.

The five industry-facing reports

These reports bring to life NI’s key assets based on the five Pillars and our visitor segmentation. These guides will show how to adopt a clustering approach to developing experiential tourism in NI.

1. Coasts and Lakes
2. Unique Outdoors
3. Living Legends
4. Creative Vibe
5. Naturally NI
Experiences matter in every commercial market. People remember the experience they have with a product more than they remember the product itself. For example, why does Nike spend millions to endorse Rory McIlroy? Not just to encourage buyers to make a one-off purchase. They want to make their customers feel like they’re the ‘greatest golfer in the world’, which creates a much deeper, longer-lasting impression, which then builds attachment and brand loyalty. Tourism works in exactly the same way.

The Progression of Economic Value dictates that the greater the differentiation the more you can charge. A common example is how much more a glass of wine costs once it is being ordered in a five-star restaurant. It is still just a glass of wine but its value is so much more than the same glass of wine from a bottle at home.

There are 3 levels of experience-led businesses:

1. **Demand generators** – the attractions, activities and events that act as a primary motivator for tourists to visit a destination (e.g. NI’s Signature Projects).

2. **Supporting experiences** – the attractions, activities and events that are not the main motivator for visiting, but contribute to the overall appeal of a destination and encourage visitors to stay longer and spend more.

3. **Hidden gems** – the local secrets that have the potential to add value to a visitor’s experience (e.g. local produce, artisans, musicians, local characters)

Experiential tourism is about providing ways for visitors to become more deeply immersed in the product and engaged in an emotional way. The focus is on feelings, sensations, stories and connections rather than simply products. We can do this through bringing to life our heritage, culture, history and unique character. But there are different types of tourism experiences that can be developed within a destination and we need to be very clear which are right for NI to compete effectively.
How to put experiential tourism into practice in NI?

NI is comparatively a very small country and so it is to be expected that we have fewer signature standalone experiences to rely on for our tourism attractors. But NI is literally brimming with smaller experiences that when ‘clustered’ together can pack a punch all on their own – if we choose to look at how we deliver tourism in a different way.

The key to recognising which experience has the greatest value is to start with our visitors and consider first what motivates and inspires them the most.

“Stand in our visitors’ shoes – what would they like to see, how would they like to feel? What would secretly delight them? And then consider, can we offer it to them?”

Understanding Experiential Tourism - what it is and what it is not

<table>
<thead>
<tr>
<th>Type</th>
<th>Descriptor</th>
<th>NI example</th>
<th>Experiential</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Standalone product</td>
<td>A single hotel/pub/restaurant</td>
<td>✗</td>
</tr>
<tr>
<td>2</td>
<td>Standalone experience</td>
<td>Titanic Belfast</td>
<td>✓</td>
</tr>
<tr>
<td>3</td>
<td>A cluster around a theme</td>
<td>The Five Experience Pillars</td>
<td>✓</td>
</tr>
<tr>
<td>4</td>
<td>A cluster around a destination/attraction</td>
<td>Giant’s Causeway Bushmills</td>
<td>✓</td>
</tr>
</tbody>
</table>
The biggest opportunity for NI now is to introduce Experiential Tourism by developing clusters around specific themes – type number 3. This is highlighted in the example below.

**Type 1. Standalone product**
- No linkages
- Random selection
- No opportunity to develop tourism
- Little opportunity for added value

**Type 2. Standalone experience**
- Lots of opportunity to add value
- Can cross sell/up sell
- Story can immerse
- Can link to other attractions

**Type 3. Cluster around a theme**
- Variety of products now linked
- Joint promotion opportunities
- Collaboration and innovation likely

**Type 4. Cluster around a destination/attraction**
- Dependent on strong attraction located in one area
- Able to promote destination to visitors
- Collaboration and innovation happens in destination

---

*Example: Coasts & Lakes*
- Seafood
- Armagh Apples
- Bushmills
- Hub Towns
- Cafés
- Hotel
- Distillery
- Small villages with history
- Charter
- Cruising

*Example: Titanic Belfast*
- Theming
- Merchandise
- Food
- Own produce
- Events
- Romantic evening
- Kids activities
- Education

*Area or destination e.g. Lisburn*
- Attraction – e.g. The Linen museum
- Shops
- Hotel
- Pub
- Restaurant
Combining different themes to create a memorable experience

‘Appetite for Adventure’, Scotland

To showcase to visitors the heightened experience they can have in Scotland by combining two of the country’s most distinctive assets (food & drink and adventure activities) VisitScotland, the national tourism organisation for Scotland, produced a guide, ‘Appetite for Adventure’, to promote these experiences.

The guide features ten outdoor activities for all abilities across different regions in Scotland and combines them with a range of local food and drink offerings. The experiences also encompass some of Scotland’s other key tourism assets, such as whiskey – pulling together a strong, authentic offering that will delight visitors.

This cluster approach is just the kind of thinking we can use in NI to join up some of our key assets. If we can create inspiring experiences for visitors, it removes the hassle factor for them and may just give them an exciting new reason to come here.

www.visitscotland.com/eatscotland

Case Studies

1. Clustering within an area to create more reasons for people to visit and to spend money

Healthy Lifestyle Tourism Cluster, East Sussex

A pilot project was started in East Sussex to use a cluster approach (rather than destination marketing) to provide greater opportunities for smaller tourism businesses. The area had suffered through the economic downturn and decline of long stay tourism, on which they were heavily reliant, and they needed to attract a different type of visitor.

The small project team decided to create a cluster around Healthy Lifestyle, which was ideal as the area already had many health-related activities to draw on. It could encompass a broad range of business types; organic and traditional produce, accommodation, restaurants, indoor and outdoor activity providers, retailers, attractions and recreational operators. There were also existing business networks in place that related to the theme, such as Taste of Sussex and Food and Health Partnership.

The pilot gave significant benefits to the small businesses that had been used to operating in isolation. Tangible benefits included the sharing of ideas, new product development, increased profitability, new collaborations and entrepreneurial new business. Overall it enhanced the area’s offer to attract a new type of visitor with a broad range of relevant, joined-up experiences.

2. Combining different themes to create a memorable experience

Benefits of clusters

✔ Can operate as a strategic alliance with a single stronger voice
✔ Can make a stronger bid for funding
✔ Economies of scale in joint marketing initiatives
✔ Greater opportunities to learn from each other and access useful knowledge and insights
✔ Can share resources (marketing, technologies, benchmarking etc.)
✔ Encourages innovation
✔ Promotes better business through providing a joined up experience to visitors

Definition:

Clusters = Interdependent businesses that have come together around a geographic or thematic boundaries. They have active channels for business transactions, dialogue, and communications and collectively share common opportunities and threats.

Overview Report
Competition vs. collaboration – getting businesses on board

Many businesses that are used to having viewed their competition as being, for example, the neighbouring restaurant or visitor attraction, will find it a big mindset to realise that the competition is not here – it is ‘over there’. There is a much bigger gain for everyone to adopt a collaborative approach and work together. Remember – the visitor isn’t looking primarily for differentiation in price; they are looking for differentiation in value and in what is offered. This will also allow us to encourage a premium price and a higher overall spend.

<table>
<thead>
<tr>
<th>Do we collaborate or compete? A national approach</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Marketing approach</strong></td>
</tr>
<tr>
<td>1 Attract visitors to the UK</td>
</tr>
<tr>
<td>2 Attract visitors to the Island of Ireland and then to NI</td>
</tr>
<tr>
<td>3 Ensure all visitors have lots of ideas and inspiration on what to do and what to see all around NI. Use the Five Experience Pillars and visitor segments</td>
</tr>
<tr>
<td>4 Specific promotions and marketing in particular regions</td>
</tr>
<tr>
<td>5 Specific marketing and promotions for individual businesses</td>
</tr>
</tbody>
</table>

Why we need to cluster experiences around our best assets

According to the Association of British Travel Agents (ABTA) Travel Trends Report 2012, holidays and short breaks are the last thing to go during an economic recession. People will make many other sacrifices before they decide to forego their trip away. But this also means visitors are increasingly demanding and selective. There has been a distinct move away from Mass Tourism, which sold generic packages with low levels of personal involvement. Now, people want bespoke offerings that tap into their hearts and minds, giving them once-in-a-lifetime experiences that are just right for them. They care deeply how they will spend their precious time away and they want to find an experience that closely matches their needs.

Moreover, with such a powerful looking and booking tool as the internet and recommendations on sites such as TripAdvisor, potential visitors are also armed with all the tools to design a tailored trip that reflects their aspirations and expectations.

This is why we now must shift our focus away from marketing standalone products into creating and marketing experiences – or Experiential Tourism.
Great customer experiences are:

• A source of long-term competitive advantage
• Created by consistently exceeding customers’ physical and emotional expectations
• Differentiated by stimulating emotion
• An embodiment of the brand
• Enabled through inspirational leadership and facilitated by culture
• Designed from the ‘outside in’ rather than the ‘inside out’
• Revenue generating and can reduce costs

Colin Shaw, “Revolutionise your Customer Experience” (2005)
Does a visitor see the difference between a ‘product’ and an ‘experience’?

The challenge is to connect NI’s physical assets with how people want to FEEL as a result of experiencing them. A good experience will enhance a trip, create stronger memories that visitors will share with others and encourage visitors to come back.

<table>
<thead>
<tr>
<th><strong>Buying a ‘product’</strong></th>
<th><strong>Buying an ‘experience’</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>e.g. a hotel room, a museum pass, bike hire</em></td>
<td><em>e.g. a relaxing break, a family-friendly interactive exhibition, a cycling and whiskey tour</em></td>
</tr>
<tr>
<td>Focus on what it does</td>
<td>Focus on how it makes you feel</td>
</tr>
<tr>
<td>Is what you buy</td>
<td>Is what you remember</td>
</tr>
<tr>
<td>Bought as a single activity</td>
<td>Stimulates interactions with wider communities and all parts of a business/other businesses to deliver authentic experiences</td>
</tr>
<tr>
<td>It is what it is – no links to anything else</td>
<td>Promotes whole geographic areas around themes</td>
</tr>
<tr>
<td>Usually a standalone offer and price driven</td>
<td>Driven by value and can attract a premium price</td>
</tr>
<tr>
<td>Limits the stay to the single activity. Little opportunity for spending</td>
<td>Lots to see and do and so likely to stay longer and spend more through creative cross selling</td>
</tr>
<tr>
<td>Can be impersonal and feel cold and uncaring about them</td>
<td>Is usually warm, personal and interactive</td>
</tr>
<tr>
<td>Is easily forgotten once the activity has ended</td>
<td>Creates strong memories and associations</td>
</tr>
<tr>
<td>Not generally talked about</td>
<td>Encourages word of mouth recommendations and opportunities for social media</td>
</tr>
</tbody>
</table>
Who is doing experiential tourism well?

Looking at our close neighbours, everyone is developing visitor experiences at some level, whether that is with a destination or themed focus. Further afield in Canada, the CTC (Canada Tourism Commission) has been leading the way on experiential tourism for some years. They realised that the quality, authenticity and uniqueness of a visitor experience would be key to ensuring that Canada’s brand was differentiated in the marketplace. This journey started for them by developing a deep knowledge and insights of their customers through EQ (Explorer Quotient research).

www.canada.travel/corporate

Case Studies

3. Telling stories to bring local culture and heritage alive in an experiential way

The Great Spirit Circle Trail, Canada

The Great Spirit Circle Trail is part of the ‘Signature Experiences Collection’ created by the Canadian Tourism Commission to promote Canada as a destination.

The trail tells the story of the ‘Anishinaabe’ people from Manitoulin Island in Canada’s Sagamok Region. Through offering visitors hands on experiences from staying in a traditional teepee to cooking authentic food to discovering their native land on horseback, the story of the Anishinaabe people’s culture, arts and traditions are brought to life – providing visitors with an authentic Aboriginal experience. The trail is a great example of a destination inviting visitors to enjoy their local culture and heritage by providing them with an immersive experience.

www.circletrail.com

4. Packaging a range of local experiences to add value for visitors

The Bonham Hotel, Edinburgh

The Bonham management recognises that although it is a single product (a hotel) within a destination, they can create a unique experience for visitors by packaging up a range of quality ‘products’ from around the city offered by other local businesses.

Experiences include:
- Innis and Gunn Tasting Dinner (collaborated with local brewery to host tasting evening at hotel)
- Story of Dr Knox Dinner (linked up with local tour company to bring to life the story of a historical character over dinner)
- Cupcake Master classes (teamed up with Lizzie’s Tea Party, a local business that hosts master classes at the hotel)
- Giant Panda Package (joint offer with Edinburgh Zoo with a trip to see the Giant Pandas Tian Tian and Yang Guang)

www.townhousecompany.com/thebonham
5. **Using an interactive product–based experience to attract visitors**

**Shediac Bay Cruises, Canada**

Shediac Bay Cruises is a fantastic example of a 'product-based' experience. Shediac Bay is known as the ‘Lobster Capital of the World’, and the town hosts an annual festival in July promoting and celebrating its lobster fishing heritage. Visitors entering the town from the west are greeted by the largest lobster sculpture in the world!

Shediac Bay Cruises hooks into their local theme by offering a full interactive lobster fishing experience. Visitors get a real hands-on experience as they work with the lobster traps, pull on the ropes, enjoy a 20-minute educational presentation, learn to cook and crack open lobsters and are then served a traditional lobster meal. They are then are given the recipe to take home and continue their experience. The mix of immersion, learning and post-activity information provides visitors with a long-lasting and unforgettable experience.

[www.lobstertales.ca](http://www.lobstertales.ca)

6. **Linking products around a theme**

**Ancestral and Literary Tourism in East Midlands**

The Renaissance East Midlands Ancestral and Literary Tourism project is another excellent example of a destination linking ‘products’ to create an engaging experience for visitors.

Started in 2008, the aim of the project was to better understand visitors who came to the area with the purpose of learning more about their family history or to discover their literary connections. By looking into the needs and wants of this type of visitor, the East Midlands team were able to tailor and enhance their product offering to capitalise on this market.

Workshops were developed to inform local businesses about Ancestral and Literary tourism and to provide them with information about what these visitors might be looking for, thus equipping them with the knowledge to provide a quality experience. Leaflets were developed for visitors to help them map out where they should start on their personal ancestral experience.

[www.emms.org.uk](http://www.emms.org.uk)
Collaborating within a destination to create a strong brand

**Taste of Arran - Scotland**

Taste of Arran, a collective of 10 quality food and drink producers (‘Food Heroes’) from the Isle of Arran in Scotland has capitalised on the growing trend for locally-sourced food and drink, and as a result provided visitors with a memorable experience of the island’s food and drink offering.

Through collaboration and a joined-up approach of the marketing and distribution of Arran’s food and drink produce, they have not only created a strong, recognised brand, which has also increased purchasing power, but they have created a unique experience for visitors by taking them through the journey of the produce from seed to plate.

From featuring seasonal ‘Taste of Arran’ produce on local menus to selling branded gifts in local shops to offering tours at the Taste of Arran producers’ premises, the group are offering visitors a joined-up experience of the island’s food offering – all by thinking how, together, they could ‘package’ their best asset.

www.taste-of-arran.co.uk

---

So what is our CHECKLIST for creating an experience?

✔ It must be globally unique

Visitors are looking for offerings that can only be found in the location they’re visiting, or a focus on things that are distinctly NI.

✔ It must be authentically local

Genuine local experiences are often the ones that provide the stand-out quality that people remember. Visitors want something they can’t experience elsewhere.

✔ It must be interactive

Visitors don’t want to just see things. They want to learn something new that evokes emotions; feel a sense of belonging and feel alive.

✔ It must be aligned to the needs of our visitors

When making decisions, visitor needs come first and we can work back from that knowledge. This begins with a good understanding of the visitor segments.

---

**Did You Know?**

Experience sells

Great customer experiences are a source of long-term competitive advantage and are designed ‘outside in’ rather than ‘inside out’. This means starting at the end customer – or visitor – and working backwards.
How are we shaping up today in NI?

Our visitors demonstrate that they now look for an experience in their trips away. And many of the things they like to do link very neatly with our Five Experience Pillars. However, between NI, ROI, England and Scotland we don’t fare so well on many of the criteria, other than amongst our own local markets. Although some visitors really appreciate our natural assets, they are not perceived as good value. Our most loyal and strongest domestic markets also feel there is little they don’t know about NI and so need to be inspired with some strong new suggestions and hidden gems. We are not thought to be particularly family-friendly, either.

How visitors see us

<table>
<thead>
<tr>
<th>Success criteria from case studies</th>
<th>Observed weaknesses in NI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good information to tempt, inspire and motivate</td>
<td>Lots of information but not presented through the eyes of the visitor</td>
</tr>
<tr>
<td>Lots to do and see and spend money on</td>
<td>Often not enough available to spend money on e.g. local produce, unique local experience, local arts/crafts etc.</td>
</tr>
<tr>
<td>Very open for business, especially on weekends and bank holidays</td>
<td>Primarily catering for a local market and so closed on public holidays and weekends</td>
</tr>
<tr>
<td>Excellent interpretation</td>
<td>Overly scientific interpretation and not aligned or focussed to visitor need to be entertained whilst learning something new</td>
</tr>
<tr>
<td>Never miss an opportunity to use assets and stories to bring alive for visitors</td>
<td>Many opportunities missed to enhance visitor experience</td>
</tr>
<tr>
<td>Aim offers and information primarily at visitors – locals won’t be put off</td>
<td>Sense that businesses wait to be found or only promote to an existing customer base</td>
</tr>
<tr>
<td>Use provenance and locally sourced/homemade products to enhance food and drink as an attractor</td>
<td>Missed opportunities</td>
</tr>
<tr>
<td>Excellent use of online technology, social media and review sites</td>
<td>Inconsistent online communication and marketing strategies. Little evidence of widespread use of visitor feedback and reviews</td>
</tr>
<tr>
<td>Evidence of collaboration everywhere</td>
<td>Predominately standalone products. Perhaps misunderstanding collaboration and competition?</td>
</tr>
<tr>
<td>Joined up tourism offering from national infrastructure, economic development, marketing and promotion, local governance etc.</td>
<td>Starts from within. No chance of the tourism industry being joined up if the governance and support isn’t</td>
</tr>
</tbody>
</table>

In comparison to our main competitors (Scotland, Devon and Cornwall and the Lakes) visitors perceive us more strongly for qualities such as: the new experiences we can offer, being a place to stimulate thinking, genealogy, a place to meet the locals and also to have good fun and party. But it is worth noting that even though these are stronger attributes, we are still the least favoured overall of all these destinations, which rate much higher for a short break.

The ideal short break is defined as relaxing, welcoming, fun memorable and safe, but recent visitor feedback tells us that we are falling short on this.

Looking deeper at the areas we could improve on – if we were to select several key success criteria from the best practice examples above, it might give some useful insights to compare how we think a visitor might view us.
Did You Know?

Just one third of ROI consumers feel they have a good knowledge of what NI has to offer as a short break destination. How can we make sure everyone knows the range of things to do and see? How do our tourism businesses communicate? Are they online? What do their websites say about them and NI? What social media channels are they using? Do you know?

There is clearly a lot of work to do to start to genuinely deliver a more joined up experiential tourism offer to visitors in NI. However it is well worth the effort and in many ways there is no choice unless we are happy to fall very far behind our competitors. NI has many strengths worth shouting about and there are many opportunities just waiting to be exploited.

Looking then at an overall SWOT – what can we learn?

<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>• NI seen as a country growing and experiencing positive change</td>
<td>• Not generally seen as ‘best in class’ compared to competitors</td>
</tr>
<tr>
<td>• The people of NI – real, genuine and charming with a great instinct for hospitality and friendliness</td>
<td>• Poor communication – lack of business websites and online presence</td>
</tr>
<tr>
<td>• Distinct character of people and culture</td>
<td>• Perceptions of safety issues – reduced, but still there</td>
</tr>
<tr>
<td>• Unique cultural history and stories</td>
<td>• NI often seen as expensive</td>
</tr>
<tr>
<td>• Strong attractions</td>
<td>• Not considered exciting enough</td>
</tr>
<tr>
<td>• Uniqueness in scale – so visitors can connect with lots of offerings in short time and short distance. Easy to get around</td>
<td>• Seen to have a lack of family-friendly attractions and facilities</td>
</tr>
<tr>
<td>• Amazing natural assets – coasts, beaches, mountains</td>
<td>• Considered to have a lack of award-winning restaurants</td>
</tr>
<tr>
<td>• Unique to NI – for example, Titanic Visitor Experience and Giant's Causeway</td>
<td>• Not considered ‘cosmopolitan’ by visitors looking for shopping and nightlife</td>
</tr>
<tr>
<td></td>
<td>• Predominately focused on a local market</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Better communication to visitors about what NI has to offer – from beautiful landscapes to exciting nightlife</td>
<td>• Lack of opportunities for businesses to network and create packages for visitors</td>
</tr>
<tr>
<td>• Focus on ‘new’ news and messages, on the back of all the positive changes in tourism in NI</td>
<td>• Complacency and lack of drive</td>
</tr>
<tr>
<td>• Move towards experience-led tourism, rather than simply product</td>
<td>• Limited awareness of tourism experiences in NI</td>
</tr>
<tr>
<td>• Ride on the wave of NI’s Signature Experiences</td>
<td>• NI’s most iconic attractions are often associated with ROI</td>
</tr>
<tr>
<td>• Network with other businesses, sharing experiences and best practice examples</td>
<td>• Competition from other short break markets (ROI, Scotland, Wales, Devon &amp; Cornwall, Lake District)</td>
</tr>
<tr>
<td>• Collaborate to create a stronger voice for the industry and joined-up visitor experiences</td>
<td>• Considered expensive by some markets</td>
</tr>
<tr>
<td>• Take advantage of the growing number of filming projects in NI and 'set-jetting' tourism</td>
<td>• Availability of low-cost flights</td>
</tr>
<tr>
<td></td>
<td>• Not having a culture of being ‘open for business’</td>
</tr>
</tbody>
</table>
Case Study

Making the most of local attractions to create your own themed experience

Rayanne House Belfast, Belfast

Rayanne House offers visitors a quality memorable dining experience that ties in with Northern Ireland’s rich maritime heritage – ‘Taste of the Titanic’. They have re-created the nine-course meal of the last menu served in the first class restaurant on board The Titanic.

Everything has been carefully thought out from the menu being presented on a replica boarding pass to service taking place in the period dining room with views of Belfast Lough – the spot where Titanic would have sailed down on her maiden voyage.

In addition to offering their own in-house experience Rayanne House provide information on other titanic themed products, for example the Titanic Tour conducted by Susie Millar or visiting the Titanic Belfast – not only is this helpful but it extends the overall Titanic experience for visitors by creating links and encouraging them to explore further.

www.rayannehouse.com

The NI Brand

A great way to help us develop experiences rather than standalone products in an authentic and memorable way is by making sure we are always reflecting the NI brand. We do this by promoting who we are and what we stand for – that’s what makes us unique and helps us to stand out from the competition.

Values: forward thinking, self believing, self aware, authentic

Behaviours: be yourself, be celebratory, be brave, be engaging, be realistic, be challenging

At the core of our brand and underpinning who we are – is the principle ‘confidently moving on’.

As we start to develop new ways of thinking and attracting new visitors it is crucial that we take this sentiment to heart and leave the past behind. We must not let the past become the ‘elephant in the room’ for the future and for some, an excuse for delivering poor quality in the eyes of our visitors.
Knowing what experiences visitors want and making it happen

Selling the ‘set jetting’ experience in NZ

Tourism New Zealand is focusing their marketing activity on converting the international attention from featuring in the Hobbit trilogy to generating greater awareness of New Zealand as a destination, thereby increasing tourism revenue.

100% Middle-earth, 100% Pure New Zealand! is aimed at showing potential visitors that the fantasy of Middle-earth is in fact the reality of New Zealand – and that there is a whole world of experiences to be discovered and people to meet within the movie-scene style landscapes.

They have developed a number of suggested itineraries to allow visitors to experience ‘Middle-earth’ first-hand. They include some of the country’s cultural assets as well as a series of film locations, including an excursion to the Hobbit movie set with fictional features like The Hobbit Holes and Green Dragon Inn!

www.tourismnewzealand.com

Examples of the Brand in action

<table>
<thead>
<tr>
<th>‘Moment of truth’</th>
<th>Could be anyone (detracts from our brand)</th>
<th>Uniquely us (builds our brand)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking confirmation</td>
<td>Just send the bare information</td>
<td>Give more info on what to do in the area</td>
</tr>
<tr>
<td>Information in room</td>
<td>A pile of random tourism brochures in the room</td>
<td>Provide a sheet on what you and your family like to see/eat out/do</td>
</tr>
<tr>
<td>Map of how to find a particular business</td>
<td>Just use a generic map</td>
<td>Include a range of other great places to eat and drink local produce that locals recommend</td>
</tr>
<tr>
<td>Core amenities</td>
<td>Make no links to the local area</td>
<td>Reflect local produce (linen, local food, drink, etc.) tell a story about these</td>
</tr>
</tbody>
</table>

Think about what a specific area is locally known for. Is there a popular festival going on for instance? A music festival? What is it that the locals love to go to? Then think about how to turn this into an experience for visitors, too. What businesses could be part of a cluster? Which of the visitor segments might this best appeal to? What else could you encourage businesses to offer?

Closer to home there is an opportunity that is waiting to be grabbed...

How many people know that the strikingly popular series, Game of Thrones, is being filmed on set in Belfast and on location elsewhere in NI? According to Sky Atlantic, the first episode of Game of Thrones had the highest consolidated viewing figures that they had ever seen for any programme and Series 3 alone has just topped the charts with 4.4 million viewers. Businesses can take a tip from New Zealand and show how the striking landscapes of NI bring the Game of Thrones stories to life. We have the potential to share this with literally millions of fans and potential visitors.
### World trends – what people are looking for

In these days of sophisticated and value driven tourists, trends have emerged across the world. It would seem that we all want similar things – whether we find it in the Bahamas or Belfast, the same rules apply.

Have a look at some of the trends that are currently affecting the global market, plus some fantastic examples of businesses around the world that are reacting to these visitor demands. How could we make sure that in NI we all understand these are the basics for visitors and meet their needs?

<table>
<thead>
<tr>
<th>World trends</th>
<th>Getting it right?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Good value goes a long way</strong></td>
<td>The desire to find a good value deal has been driven hard through online travel agents and low cost airlines. We now accept it as the norm.</td>
</tr>
<tr>
<td>Visitors are savvy. Two thirds of NI visitors now spend more time looking for special offers than they used to. But this needn't be about cutting costs; it’s about giving visitors that something extra that they didn’t expect to make for a special experience.</td>
<td>More and more tourism businesses feature an ‘Offers’ section on their website featuring offers like kids go free, 2 for 1 entry and stay 2 nights get a 3rd free. Some destinations offer visitors value for money via a ‘pass card’ where the businesses feature their offer in the one place like The Edinburgh Pass and ‘iventure’ card in Sydney.</td>
</tr>
<tr>
<td><strong>Authenticity</strong></td>
<td>An authentic experience is often something that seems ordinary to you but is special to a visitor, like paying to herd sheep for an afternoon. Eco tourism is booming in many areas globally and gives rise to volunteer tourism, homestays and ‘dine at home’ experiences. At Vallum Farm in Northumberland they have started a range of outlets featuring authentic food and produce (see case study on page 19 for more information).</td>
</tr>
<tr>
<td>Visitors are looking for genuine experiences, which means an opportunity to discover the people and surroundings that we might take for granted. Whether it’s promoting local events and festivals or serving food and drink from local suppliers, businesses can tap into the hunger for local experiences. Visitors are even willing to pay a premium for it.</td>
<td></td>
</tr>
<tr>
<td><strong>Time for me</strong></td>
<td>The rise of spa and health tourism is an indicator of this trend. Countries with great scenery and open spaces are becoming more popular – like Scotland, Wales and NI – we have what people want. Brambles Art Retreat in Devon offer painting classes in a beautiful 17th Century cottage and take visitors outdoors to paint in the natural landscape. As well as promoting their Art Breaks they also promote simple relaxation and pampering. They understand that the modern visitor wants ‘escapism’.</td>
</tr>
<tr>
<td>Visitors want to escape from the pace and monotony of daily life, and escape to open spaces for time to relax and chill out. The Visitor Attitude Survey 2011 shows that nearly a third of NI’s leisure visitors come here to do just that. This can be as simple as enjoying a view from their B&amp;B or going for a gentle walk in the glens to getting involved in activities or enjoying a relaxing massage.</td>
<td></td>
</tr>
<tr>
<td><strong>Sustainability</strong></td>
<td>Organic food, slow food and green practices are all differentiating one business over another. Farms that diversify into agri-tourism are well placed to take advantage. Greenwood Forest Park in Wales not only offers families an outdoors adventure including an experience on the first people-powered rollercoaster ever, but they also are able to promote their green credentials. They plant around 400 trees a year, harvest rain water for flushing toilets and recycle the majority of their waste.</td>
</tr>
<tr>
<td>Visitors are aware of the environmental impact of their holidays, and expect businesses to be, too. Can businesses offer incentives for people to arrive by green modes of transport? For example, a free entry to an attraction or a free drink on arrival. It’s a great way to stand out from the competition.</td>
<td></td>
</tr>
</tbody>
</table>
How to give our visitors what they want

So our visitors want experiences, but how do we give them what they want? The good news is that you don’t need to be a big player with masses of resources to do this. In fact, being a small country with fewer regions works in our favour. For the type of experiential tourism that we are heading for, we already have all that we need – unique attributes, authentic genuine people, rich stories, a strong history and diverse culture. We now need to ensure we have a deep understanding about who we are targeting and how we will cluster our assets to form joined-up experiences.

To connect with our markets, we need to tell the stories of NI and give visitors the opportunity to get involved and feel part of it. To help do this, NITB has undertaken research to consider our own best-in-class opportunities for Experiential Tourism. We have mentioned them previously – the Five ‘Experience Pillars’ that provide the grounding to make our experiences uniquely and authentically NI. For the purpose of communicating these, we will opt for more user-friendly language and call them ‘Experience Themes’.

Case Study

Engaging with the community to provide a memorable experience

Vallum Farm, Northumberland

Vallum Farm is much more than just a farm. Working with a local community of artisan growers, smokers, bakers, chefs and ice cream makers they showcase the produce of the land in their Tea Shop, Restaurant and Farm Shop. Everything is grown either on the farm or in the surrounding area, and they supply a range of others in the trade who place their orders or come to pick their own at the Vallum Kitchen Garden.

Visitors can choose from a vibrant programme of experiences including Food with David Kennedy (the former North East Chef of the Year), Wine & Cheese Matching and Ice Cream Making sessions, each providing an engaging hands-on experience for visitors.

www.vallumfarm.co.uk

Q. Why is Experiential Tourism like CDs?

A. In the past, we were sold a collection of songs on a CD that someone else had put together. Nowadays people can buy individual songs to create their own playlists. Experiential Tourism can be seen in a similar way – crafting bespoke experiences. It is about finding the right customer at the right time for the right reason.
What are the Experience Themes?

- They group together the best experiences that NI can offer visitors
- They are based on what we know is a good match between what a visitor wants and what we can offer
- They all reflect the ways in which NI can stand out in the eyes of a visitor
- They provide opportunities for NI to be ‘best in class’, i.e. to be able to really compete with other destinations
- It is these experience themes that are uniquely ours that allow us to have a more global appeal through clustering

Creating ‘joined-up’ experiences for visitors

There is no one theme that will on its own appeal to a particular visitor type. If only life were so simple! But this approach is rooted in good market research and so we know that there is a strong likelihood that a particular type of visitor will want to pick and mix according to their needs, and that’s what will create the tourism experience. Of course this is dependent on them having enough information and ideas to hand in order to do so! We don’t necessarily need a big signature experience as the only way to attract our visitors. Rather, we need to develop a critical mass of products and experiences across all the themes that can link together and cross sell. But most of all they need to be aligned to what a visitor might be interested in. The key to this is to think

- Authenticity
- Engagement
- Personalisation

We need to align our efforts by joining up our products and turn them into experiences so they make more sense to a visitor. In short, we need to view our current offering from THEIR perspective. Then we can join up experiences for them around particular themes that we know they would like. Very often these sorts of experiences are right under our nose – it seems so obvious we don’t know why we didn’t think of it!
How could we make our experiences more memorable, using what we have on our doorstep?

Consider a visitor coming to the ‘Home of Linen’, Lisburn. How could we immerse them in the heritage of a bygone era of linen manufacturing and turn that into an interactive, storytelling opportunity? Perhaps they are staying in a country house with connections to the linen industry – in which case they will want to hear stories about the original family of the house and of course, sleep in linen sheets. They could be encouraged to visit the Linen Museum and tempted to buy some of our beautiful linen products, taking a piece of their NI experience home with them.

We are known for our fabulous bakeries. It is a unique tradition and quite unlike the rest of the UK, where many have disappeared or are in decline. How do we use this asset to attract visitors? We simply need to tell them about it! Rather than just enjoying tasting, we have the opportunity to immerse visitors in our culture and perhaps show them how to ‘throw a soda’ or make buttermilk scones. Whilst driving the Causeway Coastal Route for example, imagine how much a visitor would love to stop to taste some traditional Northern Irish home baking. Would they know where to go to do this? Is there enough information for them?

A visit to the underground wonders of stalactites and stalagmites is truly bewitching. Remember that experiences that may become ‘the norm’ for us can be a rare one-of-a-kind experience for visitors. So how do we explore the full potential of attractions like this? Could the tour have more of a theatrical and dramatic focus rather than scientific? Kids, too would love to get involved with science in a more interactive way. To immerse people in our LIVING LEGENDS – could we evoke a feeling of being the first cavers? Visitors would love this. The on-site café too, could extend the visitor experience by theming décor and food around fossils and rocks. Perhaps over lunch, visitors would love to learn more and explore small exhibits for themselves; a perfect way to entertain young families. There could also be themed crafts for sale, and what about some wonderful fresh grilled trout from Fermanagh lakes here too?
Understanding NI visitor segments

Over the last few years there has been a variety of research studies conducted to try to better understand the profiles of our visitors: who they are, what they are looking for from a holiday in NI and what types of experiences we could offer them.

Key markets for driving growth in NI are GB, ROI and NI itself so this is where we need to focus our attention at the moment. In global terms and for the longer term we need to keep an eye on emerging markets, particularly BRIC countries (Brazil, Russia, India and China – the latter are the largest spenders in tourism, increasing a massive 40% in the last year alone, and are on the path to make 100 million trips in 2020,) which will offer growing opportunities in the future.

Best practice shows that leading destinations focus their efforts on defined groups of visitors, or ‘segments’, who share the same criteria. For example, VisitScotland successfully uses a segmentation model for targeting the UK market. Some of these segments are ‘warm’ to Scotland and others ‘cold’, and each segment represents a different demographic, geographic region and shows different wants and desires from a holiday in Scotland. Depending on their marketing campaign, VisitScotland will target a selection of these segments at a time.

So who are our key segments? We have prioritised the following key segments for immediate growth opportunities, and importantly, linked them to the Experience Themes.

For more details of all of these visitor segments go to the ‘Research & Intelligence’ tab on [www.nitb.com](http://www.nitb.com)

<table>
<thead>
<tr>
<th>Segment</th>
<th>From</th>
<th>What they like</th>
<th>Examples of how businesses could attract them</th>
<th>Themes to promote</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Escapers</td>
<td>GB</td>
<td>Slowing the pace of life Getting away from it all Authentic and beautiful places Relaxation Connecting with family Out-of-the-ordinary things to see and do</td>
<td>Provide lots of info about unique and special things to do Encourage them to try and test restaurants that offer fresh, local food so they can make recommendations to visitors Suggest gentle activities that show off the landscapes Carry brochures about nearby ancient sites Provide information about local pubs with a truly Irish feel. Could they link up to get guests a special offer? Think about added services to help guests relax. Could they offer an in-room pamper package?</td>
<td>Unique Outdoors Naturally NI Coasts and Lakes</td>
</tr>
<tr>
<td>Younger 30+ couples, often with baby or toddler, needing a break from busy lives</td>
<td>GB</td>
<td>Action-packed days Fun-filled nights Adventure activities The ability to be spontaneous New experiences and exploring new places Being social The ‘Wow’ factor</td>
<td>Offer last-minute booking deals Provide itineraries for day trips within the local area, taking in a range of activities/experiences Can their business get involved with any local festivals? Is there a must-do pub or pub crawl in the area? Tell visitors about it Provide transport info for nightlife If the business is in the city, can they link up with a rural business to offer the ‘best of both’, and vice versa?</td>
<td>Creative Vibe Unique Outdoors Living Legends</td>
</tr>
<tr>
<td>Social Energisers</td>
<td>GB</td>
<td>Authenticity Insight Independence Immersion in culture Off the beaten track</td>
<td>Promote the wellbeing experiences and stress-free nature of local surroundings Carry brochures for local historic and cultural spots of interest Offer itinerary suggestions to encompass a range of sights Tell visitors about ‘hidden gems’ that will make them feel like they’ve experienced something unique Stock produce/gifts from local suppliers Have a list of upcoming cultural events on their website</td>
<td>Living Legends</td>
</tr>
<tr>
<td>Energetic young (15-34) couples/adult groups</td>
<td>GB</td>
<td>Action-packed days Fun-filled nights Adventure activities The ability to be spontaneous New experiences and exploring new places Being social The ‘Wow’ factor</td>
<td>Offer last-minute booking deals Provide itineraries for day trips within the local area, taking in a range of activities/experiences Can their business get involved with any local festivals? Is there a must-do pub or pub crawl in the area? Tell visitors about it Provide transport info for nightlife If the business is in the city, can they link up with a rural business to offer the ‘best of both’, and vice versa?</td>
<td>Creative Vibe Unique Outdoors Living Legends</td>
</tr>
<tr>
<td>Culturally Curious</td>
<td>GB</td>
<td>Authenticity Insight Independence Immersion in culture Off the beaten track</td>
<td>Promote the wellbeing experiences and stress-free nature of local surroundings Carry brochures for local historic and cultural spots of interest Offer itinerary suggestions to encompass a range of sights Tell visitors about ‘hidden gems’ that will make them feel like they’ve experienced something unique Stock produce/gifts from local suppliers Have a list of upcoming cultural events on their website</td>
<td>Living Legends</td>
</tr>
</tbody>
</table>
Businesses need to identify the markets they think could be interested in coming to them. Then it gets easier – consider what your visitors want, and give it to them!

<table>
<thead>
<tr>
<th>Segment</th>
<th>From</th>
<th>What they like</th>
<th>Examples of how businesses could attract them</th>
<th>Themes to promote</th>
</tr>
</thead>
</table>
| Time Together                          | NI   | Relaxation, Excellent food and wine, Enjoy natural scenery, Visit local landmarks, Check out local shopping, pubs and cafes                                                                                     | Use words that evoke ‘time out’, ‘luxury’, and ‘romance’ in marketing materials  
Give recommendations for local scenic walks and shopping experiences  
Provide info about nightlife in the local area to encourage an overnight stay  
Are they celebrating a special occasion? Ask, and have a surprise gift awaiting them  
Promote their business on daily deal sites such as Living Social or Groupon                                                                                   | Naturally NI  
Coasts & Lakes  
Creative Vibe  
Coasts & Lakes  
Living Legends  
Creative Vibe |
| Couples looking for romantic breaks    | ROI  |                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                   |
| Mature Cosmopolitan                    | NI   | Relaxation, Good quality food and drink, Scenic drives, Going to the theatre, Authentic Irish pubs, Good deals, The big local attractions                                                                     | Give first-hand recommendations for the best quality places to eat out  
Provide maps for guests, highlighting must-see viewpoints  
What can they offer to add value, without compromising price?  
A welcome drink? Complimentary toiletries?  
Do they have ‘what’s on’ information on their website, or can they link to it?  
Printed marketing materials are the preferred holiday planning tool - so is this known?                                                                                     | Coasts & Lakes  
Naturally NI  
Creative Vibe  
Coasts & Lakes  
Living Legends  
Creative Vibe |
| Frequent breakers, usually older market, travelling as couple or two couples | ROI  |                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                   |
| Family Fun                             | NI   | Fun things to do, Things to keep children entertained, To see the kids happy, Time to explore together, Safety assurances                                                                                        | To attract more families – think how this can be incorporated into signage and marketing materials  
Give recommendations for other local businesses that offer family experiences. How about linking to create a family pass?  
Do they offer babysitting services?  
Do they offer a family meal deal?  
Suggest rainy day activities that will occupy children  
If they offer activities for children too, is this spelt out in marketing materials?                                                                                     | Coasts & Lakes  
Living Legends  
Naturally NI  
Unique Outdoors  
Living Legends  
Coasts & Lakes |
| Families travelling with children      | ROI  |                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                   |
| Young and Lively                       | ROI  | Variety of entertainment, Cafe culture, High profile attractions, Cool nightlife, The ‘Wow’ factor                                                                                                         | Does the language used in marketing materials sell the cool factor?  
If they have a website (which is important for this market), do they link to a range of activity providers?  
Do they have up-to-date info available about local nightlife and gigs?  
Are prices offered in sterling and Euros for ease of conversion?  
If their business is near a city, is the proximity promoted to access a visitor’s nightlife and entertainment?                                                                                    | Unique Outdoors  
Creative Vibe                                                                                     |
Sample itinerary to develop an experience tailored for a ‘Mature Cosmopolitan’

For the ‘Mature Cosmopolitan’, who like to relax on scenic drives, visit iconic attractions and authentic pubs, as well as sampling local food and drink - all at a fair price - the following is an example of the ideal experience for them, which encompasses both ‘Coasts and Lakes’ and ‘Naturally NI’.

Whilst enjoying the scenery on the Causeway Coastal Route, a couple stop off at Mary McBrides (LIVING LEGENDS) to sample the local refreshments and soak up the atmosphere in one of Northern Ireland’s smallest pubs (NATURALLY NI & CREATIVE VIBE). But they are finding it hard to choose between hopping over to Rathlin Island to explore the Kebble Kinramer Nature Reserve or visiting the waterfalls at the Glenariff Forest Park (UNIQUE OUTDOORS)! They have however decided to enjoy a spot of home-made food at the Diamond Bar at Ballycastle where they hope to catch a traditional live band (CREATIVE VIBE). They continue north to brave the Carrick-a-Rede Rope Bridge (COASTS AND LAKES) and walk off their hearty meal. They cannot wait to experiencing the magic at the Giants Causeway (NATURALLY NI) but before they do, they have enough time to enjoy another of Northern Ireland’s finest with a stop off at Bushmills (NATURALLY NI).

In the past, we have been overly reliant on a very local market. They know who we are and what we offer and they know our ways and so will put up with a lesser quality product without complaint. It doesn’t mean that we have exceptional products and flawless service – it just means that we have forgiving visitors! Local visitors will expect to find very few places open on a UK Bank Holiday Monday; they will forgive the lack of home-baking in a tea shop or information on where to find the best local arts and crafts. They don’t need this information and so tourism businesses have got used to not providing it. Does this ring true for you? However out-of-state visitors will not be so forgiving and therefore we must ensure that the industry up their game.

Some low hanging fruit

- According to the NITB Consumer Barometer Report carried out in 2012, 27% of ROI visitors say that they want to visit NI in the next two years; 42% in the next five years. This is a must-not-miss opportunity – we need to make sure that they do and that they have enough information to know what is on offer.
- Holiday spend for domestic visitors increased by 15% between Jan – Sep 2012 and the same period in 2011.
- The GB market is in decline and NI accounts for only 0.3 of all trips! If we can harness growth in this market, it could be a real game changer for NI tourism.
- According to the Visitor Attitude Survey 2011, visitors from outside NI base trip planning on personal recommendations (43%) and a significant number rely on TripAdvisor (14%). We must we encourage visitors to share those experience now and ensure they speak positively – it could have a huge impact.
- Almost half of visitors to NI are families! This is an area we are known to be weak on and so there is a great opportunity to develop family package deals and encouraging their repeat visits.

24
The visitors we want to attract will need lots of information, they will need to know where our hidden gems are, they will want to sample our fresh produce and delight in our stories. They need to get immersed in our culture and we must show them the best of who we are and what we can offer them. If two thirds of potential ROI visitors don’t know what to do and see in NI, we need to tell them – and everyone else too. And we need to ask for feedback – all the time and every time – to show that we value their custom and are willing to hear their advice. We must be willing to change.

In short we need to be more open for business – right across the country.

The subsequent guides in the series will add more depth to this visitor knowledge and be full of practical tips for businesses to do something different right now in their business to support our approach.

How can you help drive change?

• Look at our strengths and opportunities on the SWOT. What can you do to collectively deliver Experiential Tourism through clustering?
• To engage and attract visitors to NI we first must engage with each other. Everyone has a part to play. Who can you work with?
• Stand in our visitors’ shoes. What do they want? Could you offer it? How can you get the ball rolling?
3. What to expect in the Intelligent Perspective Series

The ‘HOW’ – launching the new Intelligent Perspective guides

We need a step change in the way that we deliver our tourism product. Great Britain has halved its visits to the island of Ireland over the last four years, largely preferring to go elsewhere. There is vast potential in the Republic of Ireland market, with 42% interested in visiting NI in the next five years - but this potential has yet to be fulfilled. And despite the growing ‘Staycation’ trend of holidaying at home, our domestic market too, chooses to do this less often than in the past.

It is an exciting time for anyone involved in NI tourism and there is an opportunity for everyone to get involved and play a part. In fact our future success depends on it.

These guides offer a first practical step to encouraging tourism businesses to work in a more collaborative and integrated way. They will help you to develop and focus on the creation and delivery of experiences around NI’s key assets.

What these guides can do for your business:

• Give practical tips to attract more visitors and encourage them to spend more and stay longer
• Understand how to use the visitors insights and segmentation to tailor what they offer and to whom
• Demonstrate how to grow business by collaborating with others
• Show how collaboration and differentiation will reap much more rewards than competition at a local level
• Give practical tips on how to communicate a more joined-up experience for visitors based around NI’s unique assets
• Inspire and encourage with best practice examples from other destinations and businesses
• AND... Answer the ‘so what?’ question - why bother, and what is in this for me!
Series 1 - Coasts and Lakes

Natural beauty is a key motivator for visitors to come to NI and there is a strong desire to enjoy coasts and waterways. This Theme includes two Signature Projects, the Giant’s Causeway and Mourne Mountains, making it integral to NI’s offering. If businesses can come together to link up coastal and lake experiences, we can start to build the profile of these fantastic assets.

Why is this Theme important?

The length of Ireland’s coastline is just under 1,500 kilometres (around 900 miles) and it also has extensive natural and manmade inland waterways. NI’s Causeway Coastal Route provides a dramatic, scenic portion of this unique coastline.

According to the NITB Visitor Attitude Survey 2011 nearly one fifth of visitors choose to take a trip to/in NI ‘to get close to nature and enjoy the natural environment’. Our coasts and lakes are considered unspoiled and provide us with a strong opportunity to attract several market segments.

What’s in the guide?

➤ Which visitors to target for coastal and water activities

Relating back to the NITB visitor segments, who should you target? Who comes for cruising or angling? How can you attract more of them?

➤ Most popular coastal activities with visitors to NI

Walking and hiking are the most popular outdoor activities undertaken by Irish visitors during a holiday or short break in Ireland, with 56% of NI and 61% of ROI visitors.

➤ Key developments to be aware of

For example, a total of £283k was spent across five amenity sites as part of a project to boost tourism facilities along the Mourne Coastal Route.

➤ Plus lots of best practice examples and innovations from direct competitors as well as from around the world
Series 2 - Unique Outdoors

Walking through landscape and soaking up the unparalleled scenery of NI is the key appeal of the Unique Outdoors, and we can deliver on that to the highest standards. Adventure activities have appeal among younger target audiences, so this guide will show you how to convince visitors that NI can offer fantastic adrenalin experiences, which will open us up to new markets.

Why is this Theme important?

According to the Adventure Travel Trade Association, global adventure tourism was estimated to be worth £55.4 billion from 150 million trips taken in 2010. This includes hard activities (such as climbing and canoeing) and soft activities (such as walking, bird watching and cycling). Our Links golf courses too, are second to none and are a strong attraction for international visitors.

Mintel UK reported that the largest growth can be expected to come from soft adventure activities, which fits perfectly with the NI offering as it stands – for both overseas and domestic visitors. With the guidance in this guide, we have a great opportunity to build our tourism offering and attract new visitors.

What’s in the guide?

➤ Which visitors to target for outdoor activities
Relating back to the NITB visitor segments, who should you target?

➤ Most popular activities with visitors to NI
Walking is at number one; over 90% of NI and ROI adults consider themselves to be a walker to some degree.

➤ Key growth areas to be aware of, such as golf
Ireland is in the spotlight for high quality golf, supported by star players such as Graeme McDowell and Rory McIlroy, but also our world class courses and events.

➤ Emerging activities to keep an eye on
Paintball is the most popular activity to try in the future. Nearly 40% of NI and ROI visitors would like to give it a go!

➤ Plus lots of best practice examples and innovations from direct competitors as well as from around the world
Series 3 - Living Legends

Cultural history, NI heroes and key tourism sites, such as Titanic Belfast, underpin the appeal of the Living Legends Theme. NI has a rich heritage and, packaged in the right way, can be a powerful tourism driver. Culture is also important to domestic visitors; when travelling, 62% of Irish consumers enjoy exploring sights and finding out about culture.

Why is this Theme important?

According to NISRA’s 2011 Visitor Attraction Survey, 13% of all visits to NI attractions were made to visitor heritage centres.

Genealogy is also a growing trend. According to Discover Ireland, there is estimated to be around 80 million people across the world with Irish roots, relating to the Island of Ireland. NI has benefited from this interest to a degree in terms of travel – over 15,000 overseas visitors participated in genealogical activities in 2009 while visiting NI. Of these over 8,000 cited this as their reason to visit NI. This guide will show how this and other elements of the Living Legends Theme can help grow tourism business opportunities.

What’s in the guide?

➤ Which visitors to target for heritage activities

Relating back to the NITB visitor segments, who should you target?

➤ How to engage with heritage visitors

Facebook is currently the most used type of social media with 59% of NI visitors with a profile. But don’t forget – a key segment is Mature Cosmopolitans and they prefer traditional media e.g. guides and brochures

➤ The importance of our World Heritage Site

How to use the attraction of the Giant’s Causeway as a way to bring more visitors to your business.

➤ Key developments to be aware of

What you need to know about our best-known heritage sites, in order to boost your own business.

➤ Plus lots of best practice examples and innovations from direct competitors as well as from around the world
Series 4 - Creative Vibe

This Theme encompasses all elements of our rich cultural traditions and contemporary culture in NI and will appeal to wide cross section of visitors. Excitement and fun are the critical sentiments underpinning the appeal of Creative Vibe with a considerable emphasis on nightlife. Belfast and Derry~Londonderry are a key focus.

Why is this Theme important?
According to the NITB Visitor Attitudes Survey 2011, the third most popular reason for out-of-state visitors to visit NI was to experience the unique, local culture. Mintel report too, that wider arts and cultural events are highly popular, with 15% of domestic visitors taking in one of these events in 2011.

Music forms an integral part of NI’s local culture, and we host numerous music events and festivals each year from large events with mainstream acts to local, niche festivals. We have a strong history of internationally celebrated poets and writers, forming a wealth of assets when it comes to developing literary tourism. More recently, we have also generated international interest in our filming opportunities in NI, particularly on the back of the cult TV Series, Game of Thrones. This Theme is rife with opportunity.

What’s in the guide?
➤ Which visitors to target for different types of cultural activities
   Relating back to the NITB visitor segments, who should you target?
➤ Most popular cultural activities with visitors to NI
   For example, for overseas visitors to NI, festivals come out top among their reasons to visit.
➤ Key growth areas to be aware of, such as set jetting
   NI is poised to take advantage of its links with the film industry. The first three series of Game of Thrones delivered an impressive economic impact of £65 million, and there is potential for much more.
➤ Barriers to growth and how to overcome them
   For example, some 60% of NI and 72% of ROI consumers feel that tickets for festivals and events are too expensive – how can we add value?
➤ Plus lots of best practice examples and innovations from direct competitors as well as from around the world
Series 5 - Naturally NI

Naturally NI is a slightly different Theme, in that it underpins all four of the other ones. Its focus is to provide authentic and relaxing experiences of wild and managed landscapes across NI, which means it has several crossovers. However it’s important in its own right because niche products such as wildlife, forest trails and parks have a firm appeal with overseas audience. A key part of this theme which underpins all experiences is locally sourced food and drink experiences.

Why is this Theme important?

There is no doubt that NI has a unique and natural advantage when it comes to wildlife tourism. In the NITB Visitor Attitudes Survey 2011 just under a fifth of visitors chose ‘get close to nature and enjoy the natural environment’ as their key motivator for visiting NI. However, within the core activities, such as bird and whale watching, NI has yet to reach its full potential from a commercial perspective.

Garden tourism is also a growing opportunity. People are now travelling to visit gardens in other towns, counties and countries. With everything from stately homes with impressive gardens to smaller domestic gardens, NI’s offerings are already a long-established attraction for locals. What more can tourism businesses do?

What’s in the guide?

➤ Which visitors will be attracted to nature activities

Relating back to the NITB visitor segments, who should you target?

➤ Key sites that contribute to this Theme

For example, our wildlife, gardens, forest parks, glens, mountains, Areas of Outstanding Natural Beauty, coasts and lakes.

➤ Key growth areas to be aware of, such as crafts

According to a Mintel report, both Irish and overseas visitors to Ireland have a strong interest in local culture, which includes local crafts and customs.

➤ Emerging activities to keep an eye on, such as gardens

Mintel research from 2011 shows that nearly 20% of NI tourists had visited gardens in NI in the past 12 months.

➤ Plus lots of best practice examples and innovations from direct competitors as well as from around the world
4. Get involved!

Giving our visitors authentic experiences of NI is crucial. Did you know that we are one of the first in the home markets to structure our strategic tourism delivery in this way? We are pioneers and have the opportunity to showcase our talents to our stronger neighbours. We truly have a chance to shine.

How can WE drive change? Suggested next steps based on best practice

Develop a focus on Experiential Tourism

- Know what your visitors want. How can you bring their experience of NI to the next level?
- Develop your own marketing centred on the different segments and experiences in mind
- Identify best practice from similar businesses around the globe. Could you adapt any of these ideas?
- Look out for knowledge sharing events hosted by NITB

Identify and support a Cluster approach in your local area

- Take the initiative. Is there potential to organise a tourism action group in your local area?
- Is there a particular business that would really complement your own? Get in touch to discuss opportunities
- Speak with other tourism providers in your local area to identify possible synergies and partnerships
A practical guide to experiential tourism in Northern Ireland

Resources

• Creating Experiences Toolkit
• Campaigning for Tourism
• The Priorities for Growth
• Intelligent Perspective Series – the Five Experience Themes

Please contact NITB at insights@nitb.com for more information on the Intelligent Perspective Series