

NORTHERN IRELAND
GAME OF THRONES®
TERRITORY

**The Making of a
Screen Tourism Destination**



**tourism
northernireland**



Transforming Northern Ireland into an international screen tourism destination

Game of Thrones® has transformed tourism in Northern Ireland. After ten years of filming and production, eight unmissable seasons and over 70 hours of incredible storytelling, the impact on local tourism has been remarkable.

Since the iconic TV show made Northern Ireland its home, fans and visitors have been arriving to explore the Home of Thrones. 2018 visitor figures suggest that Game of Thrones® helped to attract **one in every six** out-of-state visitors to Northern Ireland which amounts to approximately **350,000** people and over **£50 million** into the local economy in that year alone.

Throughout its entire production, Game of Thrones® injected a staggering **£251 million** into our economy.

Northern Ireland Screen, the lead agency for our film and TV production sector, recognised the international appetite for the show at an early stage and, together with Tourism Ireland, have collaborated with Tourism NI to strengthen the show's potential as a tourism driver.

The show's creators, HBO, were also crucial in helping Northern Ireland become Game of Thrones® Territory. Their support, collaboration and the strong working relationships we developed have been essential, and together we helped build Northern Ireland's screen tourism sector while protecting HBO's intellectual property and global brand.

Establishing and growing our screen tourism sector to its current status as a globally recognised Game of Thrones® destination took significant cooperation with many stakeholders and the wider tourism industry. Tourism NI worked extensively with our partners and the industry to ensure we made the most of the huge opportunity offered by Game of Thrones®.

We planned and created platforms for development and delivered support on the ground right across the region to help realise the potential for the sector and for Northern Ireland tourism in general.

There is no doubt Northern Ireland has been on a remarkable journey with Game of Thrones®. In less than a decade, we've undergone an extraordinary makeover as an international screen tourism destination. This epic journey will continue with the new Game of Thrones Studio Tour™ at Linen Mill Studios, Banbridge, the first permanent licensed Game of Thrones® experience in the world.

I am confident that being the real-life home of the most successful TV show in history will continue to reap benefits for years to come.

John McGrillen
CEO, Tourism Northern Ireland



Fair Head | Dragonstone Cliffs



The Game of Thrones® Effect

As the show's principal filming location for ten years, Northern Ireland earned a once-in-a-lifetime tourism opportunity. The spectacular landscapes that formed the perfect backdrop for the fantasy world of the show now attract tens of thousands of Game of Thrones® fans from across the globe.

There is a proven link between screen content and tourism. Countries that attract high-quality film and television productions can benefit from a related growth in tourism. Harry Potter in the UK and The Lord of the Rings in New Zealand are great examples of this.

In a competitive global market, screen tourism helps the destination stand out. It highlights what makes it unique and gives it a competitive edge. It can also help transform perceptions, letting tourists see the destination through a powerful new lens.

The effects can be long-lasting and highly valuable, particularly with a successful film franchise or long-running hit TV series. Game of Thrones® clearly offered this type of extended exposure for Northern Ireland.



Inch Abbey | Robb Stark's Camp, Riverrun

Economic Impact

Northern Ireland hosted many film and television productions, but it was Game of Thrones® that turned us into a leading screen tourism destination. It brought many more visitors and fans to explore our stunning landscapes and coastlines than any other production.

The economic benefits of screen tourism are undisputed. In 2018, the show played a part in attracting **one in every six** out-of-state visitors. That accounted for **350,000 visitors** and over **£50 million** for the local economy.

The tourism opportunities grew alongside the viewing figures as each season passed. Very quickly, Game of Thrones® became Northern Ireland screen tourism's most valuable asset.



350,000
visitors in 2018



1 in every 6
out-of-state visitors



£50m
spent by visitors in 2018

Source: NI Visitor Attitude Survey, 2018



Delivering Through Partnership

Northern Ireland can now say it has an established, growing, and internationally-recognised screen tourism sector. But that was only possible thanks to close collaboration with our partners: Northern Ireland Screen, HBO and Tourism Ireland. Their ongoing support and the cooperation of the tourism industry has been invaluable.

Together, we delivered extensive marketing and promotional campaigns, as well as numerous industry and consumer events. We attended international trade events, sales missions and delivered hundreds of international media familiarisation trips. We secured and hosted the official Game of Thrones® touring exhibition on three occasions, and even supported HBO's star-studded European Premiere at ICC Belfast in 2019.

We also staged the Game of Thrones® – Get Your Head in the Game industry event at the Odeon Cinema in Belfast's Victoria Square in 2018. An impressive line-up of international speakers – not to mention a guest appearance by Game of Thrones® star Ian McElhinney –

Ser Barristan Selmy, inspired over **200 tourism providers** to explore the Game of Thrones® tourism opportunity.

All of this established Northern Ireland as Game of Thrones® Territory, and ensured the tourism experience exceeded the expectations of fans and visitors.



Game of Thrones® : The Exhibition 2014



Screen Tourism Insight Day 2016



Game of Thrones® - Get Your Head in the Game Industry Event 2018



International Media Game of Thrones® Group Visit 2018



Filming Locations: Bringing Game of Thrones® to Life

Just as the show has become one of the defining cultural phenomena of the 21st century, it is now embedded in the landscapes and culture of Northern Ireland. The many stunning locations that helped define the show's image shone brightly on the small screen and now attract droves of dedicated fans who are highly motivated to travel.

With filming taking place across Northern Ireland, it is not unusual to see daily coach tours and individuals stop off at some of our most scenic locations as well as many of our lesser known beauty spots. Stopping at the exact locations where iconic scenes were filmed, fans are thrilled to walk in the footsteps of their favourite character and often re-enact their most memorable scenes.

Recognising the endless appetite for the series, Tourism NI has worked closely with HBO and Northern Ireland Screen to engage with the fans. We have created bespoke interpretive panels, a filming locations app as well as a collection of visitor guides showcasing the spectacular filming locations, the ten intricately crafted Doors of Thrones, the now famous Game of Thrones® Tapestry and the six

beautiful stained glass window installations, the Glass of Thrones.

Our close association with the show and joint initiatives means that we are internationally recognised as Game of Thrones® Territory, a place where a now thriving screen tourism sector enjoys top billing alongside a booming film and TV production industry.



Game of Thrones® Filming Locations Northern Ireland app



Carnlough Harbour | Braavos Canal



Game of Thrones® Panel - Above Murlough Bay | Renly's Camp



Northern Ireland Game of Thrones® Territory Filming Locations Map



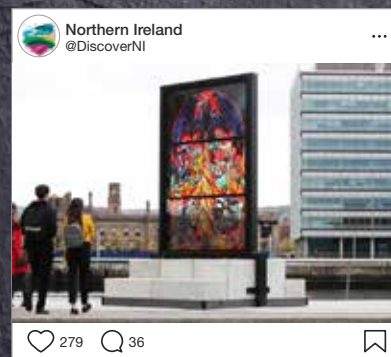
Impactful Social Media Campaigns

Northern Ireland's close association with the show gave us a new narrative and a new audience.

Campaigns created by Tourism Ireland in partnership with HBO and Tourism NI, bridged the gap between iconic scenes and their real-world locations. They reached millions of people and inspired thousands to seek out Northern Ireland Game of Thrones® Territory.

They were rolled-out alongside the broadcast of the show to millions of fans in countries including Australia, Canada, United States, France, Germany, Spain, Italy, the Netherlands, Scandinavia and closer to home in Great Britain, Northern Ireland and Republic of Ireland.

Tourism NI ensured that all the marketing assets created for the campaigns also translated into compelling visitor experiences. This gave fans more reasons to visit and more ways to fully immerse themselves in Game of Thrones® Territory.



Glass of Thrones, The Iron Throne - Titanic Slipway, Belfast



Doors of Thrones

The Doors of Thrones campaign aired over a 10-week period in 2016. It captured the imagination of **126 million people** around the world. The short films were viewed **17 million times** and the campaign generated coverage worth over **£17.5 million**.

The campaign centred around ten doors carved from fallen trees at the famous Dark Hedges, or the Kingsroad, as it's known in the show. The trees fell in a storm, but the wood was salvaged and transformed into ten intricately crafted doors. Using iconic symbols and key scenes from the show, the doors now tell the tale of Season 6. They're hanging across Northern Ireland, in pubs and hotels, close to many of the iconic filming locations.

Individually and collectively, the doors give visitors a unique experience. In 2017, Tourism NI launched a Journey of Doors passport. It inspires fans to discover all ten doors across Northern Ireland. With their Journey of Doors souvenir passport in hand, visitors follow the trail and collect an exclusive stamp at each of the venues.

The success of this campaign didn't go unnoticed. It received over **30 awards** and accolades from the marketing and advertising industry across Europe and the United States, including three prestigious Cannes Lions.



126m

people engaged with the campaign in 2016



£17.5m

generated through the campaign



Doors of Thrones, Door 8 Launch - Mary McBride's, Cushendun



Doors of Thrones, Door 4 - Blakes of the Hollow, Enniskillen



Doors of Thrones, Door 10 - The Dark Horse, Belfast



Game of Thrones® Tapestry

In 2017 the Game of Thrones® Tapestry campaign aired over 8 weeks, coinciding with Season 7. The campaign was seen by **70 million people** around the world, generating **33 million video views** and coverage worth **£20.7 million**.

The Game of Thrones® Tapestry, an incredible 87m-long medieval-style wall hanging made from Irish linen, brings to life the events, characters and scenes from the show.

It was unveiled at the Ulster Museum in July 2017 to coincide with the Season 7 marketing campaign launch, supported with an interactive web app. The Tapestry returned in 2019 and was completed to include epic moments from Season 8.

More than **200,000 visitors** filled the exhibition during its 18-month display. A survey by National Museums NI highlighted its popularity, with **97.2%** describing it as very good or good.

In September 2019, the 'Game of Thrones® Tapestry' made a voyage to France. It was displayed within walking distance of the legendary Bayeux Tapestry, its eleventh-century inspiration. During its 3-month stay, over **41,000 people** visited the exhibition, which showcased Northern Ireland as Game of Thrones® Territory.



70m

people engaged with the campaign in 2017



£20.7m

generated through the campaign



Game of Thrones® Tapestry Launch, Ulster Museum, Belfast



Game of Thrones® Tapestry, Ulster Museum, Belfast



Game of Thrones® Tapestry, Ulster Museum, Belfast



Glass of Thrones

The Glass of Thrones campaign rolled-out alongside Season 8 in 2019. It reached **87 million people** and generated 8 million video views. The earned advertising value equated to **£31.7 million**.

The campaign was built around six beautifully crafted, freestanding stained-glass windows. They were specially created and strategically installed across Belfast. The windows were designed by illustrators and a state-of-the-art machine laid the leading. Finally, a local artist and artisans stained the glass.

Each window highlights a key House from the show: House Stark, House Lannister, House Baratheon, House Targaryen, as well as White Walkers and The Iron Throne. Each panel within the windows depicts a famous moment from the saga.

As each episode of the final season aired, a new window was revealed online and in situ in Belfast and by the end of Season 8 they formed a new Game of Thrones® walking trail.

The trail now leads fans along the Maritime Mile, passing Titanic Studios, where much of the show was produced. Visitors can explore the trail using the Glass of Thrones visitor guide created by Tourism NI.

The campaign was hugely successful. It achieved extensive talk-ability and reach and also delivered a compelling visitor experience. But, most importantly, it further established Northern Ireland as Game of Thrones® Territory.



87m

people engaged with the campaign in 2019



£31.7m

generated through the campaign



Glass of Thrones Launch, Stark Window - City Hall, Belfast



Glass of Thrones Trail Guide Launch, White Walkers Window - SS Nomadic, Belfast



Glass of Thrones, Stark Window - AC Hotel, Belfast



Game of Thrones®: The Touring Exhibition

Tourism NI and partners hosted the iconic Game of Thrones®: The Touring Exhibition in 2013, 2014 and again in 2019.

The support of Northern Ireland Screen, HBO, Belfast City Council and Titanic Belfast Ltd helped us make the exhibitions a huge success. They gave thousands of fans the chance to fully immerse themselves in the fantasy TV series – right where it was made.

In 2013, it took just 24 hours for over **12,000 advance tickets** to sell-out, with requests pouring in from across the world. In 2014, a bigger and better version of the exhibition sold out again, and was launched with a red carpet event attended by cast members and HBO executives. It brought visitors from Australia, USA, Canada, Great Britain and several European countries (accounting for 24% of visitors). The event also generated around **£735,000** in direct spend and **£2.9 million** of PR value.

In 2019, Belfast was chosen as the only location in the UK and Ireland to host the biggest ever touring exhibition, with props and artefacts exclusive to Belfast. Coinciding with the epic final season, it was a fitting scale and location to celebrate a decade of filming in Titanic Quarter.

Northern Ireland is key to the life and legacy of the show. So visiting the exhibition here offered an authentic experience for fans. It let them

immerse themselves in Westeros and explore the spectacular filming locations that formed the show's backdrop.

After the exhibition, a survey revealed that Game of Thrones® was the main reason for 54% of those surveyed coming to Northern Ireland. It also showed that **91%** thought the exhibition enhanced Northern Ireland's credentials as Game of Thrones® Territory, and that **69%** were planning other Game of Thrones® experiences during their stay. Added to that, **90%** thought the exhibition improved Northern Ireland's reputation as a holiday destination.



Ian McElhinney, Game of Thrones® The Touring Exhibition 2019



Competition Winners, Game of Thrones® The Touring Exhibition 2019



Game of Thrones® The Touring Exhibition 2019



Game of Thrones® The Touring Exhibition Launch 2019



Leading Roles for New Businesses

On an economic, cultural and international level, HBO's blockbuster transformed Northern Ireland. It developed and matured our screen tourism sector through exposure to millions of people across the globe.

The show's success led to business success in Northern Ireland. It gave the tourism industry a chance to imagine new and creative experiences for this audience.

With the support and guidance of Tourism NI, the number of businesses offering Game of Thrones® experiences multiplied. It blossomed from a few filming location tours in the summer months into a thriving sector with a range of immersive experiences and tours all year long.

Many of these experience providers worked behind the scenes or appeared as extras in the show. For visitors, the chance to meet them adds a fascinating dimension to their trip and experience.

In 2019, a Game of Thrones® operators survey revealed a vibrant, buoyant business environment. The owners agreed Game of Thrones® helped transform their business and created new employment opportunities.



Game of Thrones® is the single biggest phenomenon the business has ever experienced.

Peter & Caroline McErlean, The Cuan

Game of Thrones® has been a fantastic addition to business and has brought a new buzz to the north coast.

Richard Lafferty, Aquaholics

Game of Thrones® has changed my life completely. It has given me the chance to do something I love. I thrive on people's reactions to the locations.

Flip Robinson, Giant Tours Ireland





A Lasting Legacy - Game of Thrones Studio Tour™

'That's a wrap' rang out on-set for the final time in 2018 as Season 8 finished filming. But despite the show ending, there's still so much potential for screen tourism to grow further.

Reinforcing the important role Northern Ireland played in the world-renowned series, a permanent Game of Thrones® visitor attraction at Linen Mill Studios was announced in 2019. Created in official partnership with Warner Bros./WarnerMedia Consumer Products, the world's first and only Game of Thrones Studio Tour™ will open its doors to fans and non-fans alike in 2021.

At over 100,000 sq ft, the interactive experience will reveal the world of Westeros like never before, giving visitors the chance to explore the famous sets of King's Landing, Winterfell, Dragonstone, The Wall and beyond.

It will showcase the exquisite sets and creative artistry behind the incredible costumes, props, weaponry and visual effects which brought the story of Game of Thrones® to life on screen.

The Studio Tour's location in Banbridge, between Belfast and Dublin, means it can easily be reached by the 11 million people who visit the island of Ireland each year, as well as providing even more reasons for international tourists to visit.

Game of Thrones® has been a game-changer for Northern Ireland, and now the Studio Tour will offer fans the most immersive experience in the world. We have experienced an extraordinary makeover as an international screen tourism destination, with the show's impact and legacy now firmly embedded in our landscapes and culture.

The show's popularity, coupled with the imminent arrival of the Game of Thrones Studio Tour™, combine to deliver a fantastic opportunity to continue to promote Northern Ireland as Game of Thrones® Territory to a global audience.





Galboly, The Glens of Antrim | Runestone



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