



SOAR

(Situation & Outlook Analysis Report)

August 2024



The International Monetary Fund's (IMF) latest [World Economic Outlook](#) states that global economic activity has shown resilience so far this year, supported by robust private consumption in key economies. Despite challenges such as persistent services inflation and trade tension, the global economy is expected to grow at +3.2% in 2024, the same rate as 2023. Global inflation is slowing but is still forecast at 5.9% this year. The economic outlook in the United States shows signs of cooling, especially in the labour market, after a strong 2023. The eurozone, meanwhile, is poised to pick up after a nearly flat performance last year.



There is a positive outlook for direct air access to the island of Ireland for September 2024. Based on OAG filings, scheduled air seat capacity to the island of Ireland will be 104% of September 2023 levels, with 2.8 million seats filed for the month.


OAG's scheduled air seat capacity from each of the four market areas to the island of Ireland for September 2024 is above September 2023 levels, except for Great Britain (98%), which is impacted by reduced capacity from Gatwick to Dublin.



The Central Statistics Office (CSO) recently released inbound tourism statistics for the first half of 2024. From January to June 2024, Ireland welcomed over 3.2 million overseas tourists, generating over €2.7 billion for the economy. The CSO reports that overseas tourist numbers were up +15% when compared to the same period in 2023. These overseas tourists stayed over 22 million nights. On average, overseas tourists stayed a week (6.9 nights), spending €832 per trip. More than two-fifths of overseas tourists were holidaymakers who typically stayed 5.9 nights in Ireland.



Tourism Ireland has an extensive programme of promotions under way. Our 'Fill your heart with Ireland' (FYHWI) campaign has been live across media with a goal of driving consideration of the island of Ireland as a destination to visit. We're taking every opportunity to shine a spotlight on the island of Ireland, showcasing iconic reasons to travel here and expanding people's bucket lists from best-known spots to hidden gems. Campaigns feature regional and seasonal messages and are designed to deliver brand uplift, incorporating active intent to visit the island of Ireland this year.



The European tourism industry is looking particularly healthy in 2024, according to the European Travel Commission. Its [latest quarterly update](#) states that, despite being faced with higher prices, consumers are travelling more, as year-to-date international tourist arrivals for Europe are +12% higher than last year. Southern European destinations have driven growth and remain consistently popular for their favourable climatic conditions, as well as their value for money. In addition, consumers are showing a greater desire for off-the-beaten-track destinations and international rail travel; such developments are a positive sign of change and will be crucial to ensure the sustainability of the industry in the long term.

2024 Forecast Economic Outlook trended by month

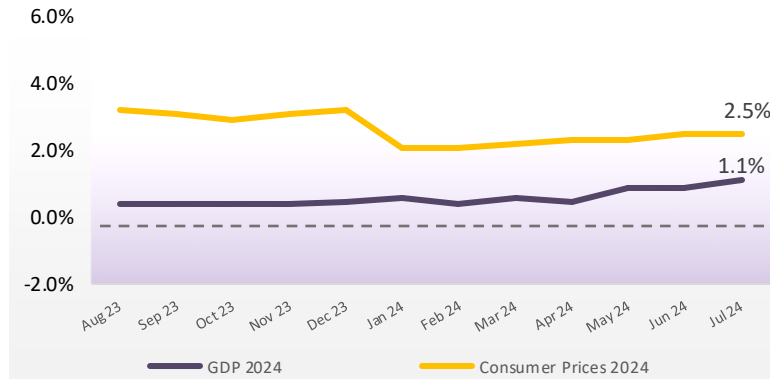
Source: Oxford Economics

Great Britain

Upward revisions to previous results and continued momentum into Q2 have prompted Oxford Economics to raise its forecast for GDP growth in 2024 to +1.1% from +0.9%. The boost to real household incomes from a fall in inflation will be a key driver of stronger growth. The lagged impact of past interest rate rises will weigh on recovery this year, but lower interest rates would offer support to higher growth next year.

Exchange rate

Aug '23 £1 : €1.16 Aug '24 £1 : €1.17

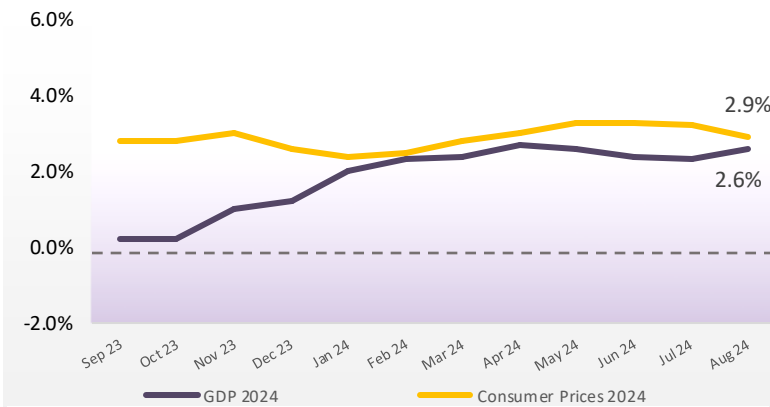


US

There have been mixed messages on the US economy, but Oxford Economics believes worries about the durability of the expansion are premature and overdone. Fundamentals are strong, inflation is moderating and becoming less of a concern for the Federal Reserve. Though the labour market has softened, the number of people who are unemployed remains low. Oxford Economics forecasts 2024 GDP growth of +2.6%.

Exchange rate

Aug '23 \$1 : €0.92 Aug '24 \$1 : €0.92
Aug '23 \$1 : £0.79 Aug '24 \$1 : £0.78

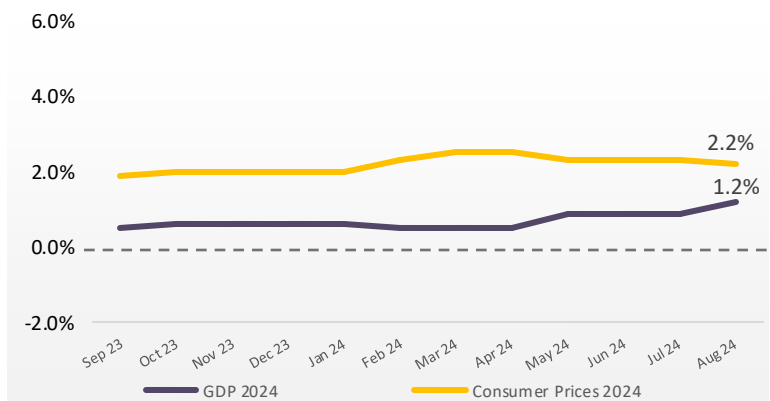


France

Oxford Economics has raised its 2024 GDP growth forecast by 0.3ppts to +1.2%. The economy has been resilient so far, even though fundamentals are viewed as weak. GDP growth in Q2 was stronger than expected, but economic momentum remained feeble as private domestic demand has been stagnant. Growth will also benefit from the Paris Olympics, which will provide a one-off boost to GDP growth in Q3.

Exchange rate

Aug '23 €1 : £0.86 Aug '24 €1 : £0.86

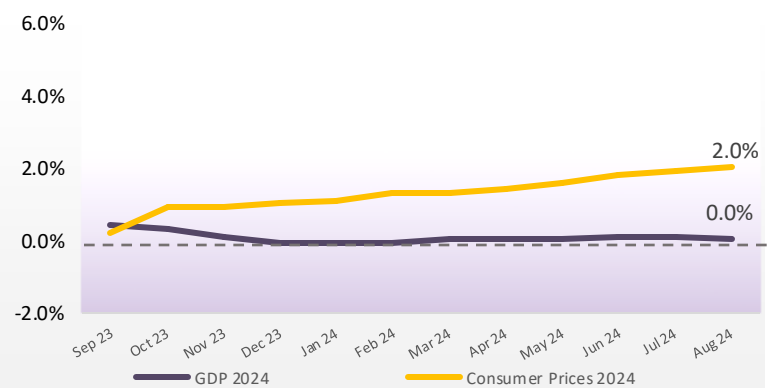


Germany

The economy is still struggling to gain momentum. A contraction in Q2 GDP, along with a string of disappointing data releases, illustrates how fragile the recovery is, with the economy barely above its pre-pandemic level. A genuine growth driver is largely missing as monetary and fiscal policy remain contractive. Oxford Economics' latest GDP forecast is for zero (0%) growth this year.

Exchange rate

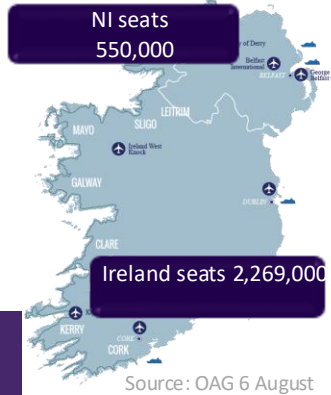
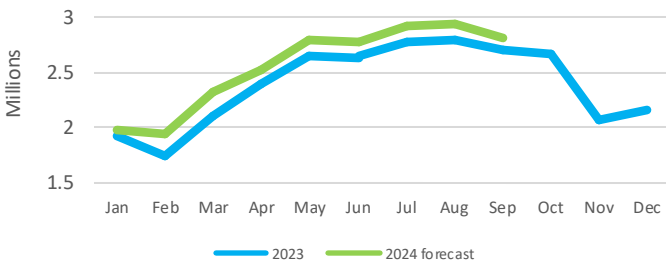
Aug '23 €1 : £0.86 Aug '24 €1 : £0.86



Island of Ireland Access Situation

OAG Scheduled Seat Capacity September 2024

Island of Ireland Scheduled Seats



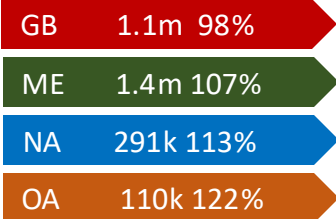
There is a positive outlook for direct air access capacity to the island of Ireland for September 2024, with over 2.8 million seats planned.

Based on OAG filings, air seat capacity to Ireland is forecast to be at 104% of September 2023 levels, with Northern Ireland scheduled at 108%.

Seat capacity to the island of Ireland for September 2024 is scheduled at 104% of the level it was in September 2023.

Air Access September 2024 – % share of September 2023

IOI Seat Capacity



OAG's scheduled air seat capacity from each of the market areas to the island of Ireland for September 2024 is above September 2023 levels, except for GB (98%), which is impacted by reduced capacity from Gatwick to Dublin.

GB = Great Britain ME = Mainland Europe NA = North America OA = Other Areas

Source: OAG 6 August

Airports Forecast – September 2024

According to OAG, Belfast City Airport and Belfast International Airport are filed at 105% and 109% respectively of September 2023 levels. City of Derry Airport is filed at 118%.

Dublin Airport and Cork Airport are scheduled at 104% and 109% respectively of the seat capacity levels in September 2023. Shannon and Kerry are filed at 104% and 103% respectively. Ireland West Airport Knock is scheduled at 86% and Donegal is filed at 136%.

Even with economic and geopolitical uncertainties, the demand for air travel continues around the world.

Airports	Sept. 2023 seats	Sept. 2024 seats	2024 % share of 2023
Belfast Intl.	373,633	406,900	109%
Belfast City	126,557	132,524	105%
City of Derry	8,538	10,100	118%
Dublin	1,839,362	1,907,411	104%
Cork	161,561	176,386	109%
Shannon	112,930	117,274	104%
Knock	55,192	47,487	86%
Kerry	18,949	19,443	103%
Donegal	528	720	136%
Total	2,697,250	2,818,245	104%

Source: OAG 6 August

Ferry Performance – January-July 2024

Data for the first seven months of 2024 confirms ferry passenger numbers on GB routes to and from the island of Ireland at 96% of January-July 2023 levels. The suspension of Stena's Fishguard-Rosslare service for a period this winter, adverse weather in April and changes in the size of some ferries have all impacted on ferry traffic between GB and the island of Ireland. Note: performance data from France and Spain is not currently available.

Ferry (both ways)	January-July 2023	January-July 2024	2024 % share of 2023
GB – island of Ireland			
Sailings	11,088	10,313	93%
Passengers	2,411,886	2,304,312	96%
Cars	700,397	665,250	95%

Ferry Passenger Traffic	January-July 2024 % share of January-July 2023
Northern Ireland	97%
Ireland	94%
Island of Ireland	96%

CSO Inbound Tourism to Republic of Ireland (Direct)

The CSO now releases Inbound Tourism statistics, replacing the former Overseas Travel series and the Tourism and Travel series of the pre-COVID-19 era. The Inbound Tourism series is compiled using a different sampling methodology and a different mode of data collection. Therefore, this series should be seen as a completely new and different statistical series, rather than a continuation or update of the Overseas Travel series and the Tourism and Travel series.

Latest: CSO Inbound Tourism Ireland (Direct) June 2024

Market Area	Spend* (€m's)	Trips (000's)	Nights (000's)	Av. Stay	Av. Spend Per Trip* (€)
Great Britain	119	227	1,030	4.5	524
North America	284	187	1,453	7.8	1,517
Mainland Europe	223	214	1,811	8.5	1,040
Other Areas	59	41	583	14.2	1,434
Total	684	669	4,877	7.3	1,022

Ireland welcomed 669,000 overseas tourists in June 2024, generating €684 million for the economy. These overseas tourists stayed almost 4.9 million nights. On average, overseas tourists stayed 7.3 nights, spending €1,022 per trip.

YTD: CSO Inbound Tourism Ireland (Direct) January – June 2024

Market Area	Spend* (€m's)	Trips (000's)	Nights (000's)	Av. Stay	Av. Spend Per Trip* (€)
Great Britain	605	1,245	5,688	4.6	486
North America	936	663	5,427	8.2	1,411
Mainland Europe	924	1,164	8,532	7.3	794
Other Areas	238	176	2,773	15.8	1,358
Total	2,703	3,248	22,420	6.9	832

From January to June 2024, Ireland welcomed over 3.2 million overseas tourists generating over €2.7 billion for the economy. These overseas tourists stayed over 22 million nights. On average, overseas tourists stayed a week (6.9 nights), spending €832 per trip.

YTD: CSO Inbound Tourism Ireland (Direct) January – June 2024

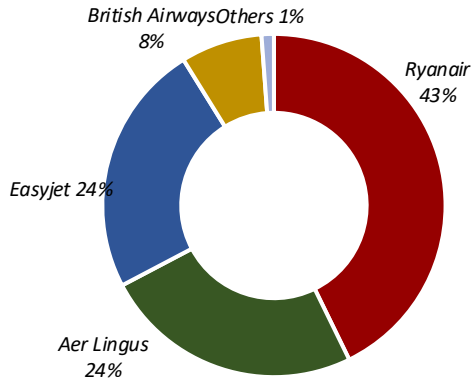
Purpose of Visit	Trips (000's)	Nights (000's)	Av. Stay
Holiday	1,372	8,034	5.9
Visiting Friends/Relatives	1,093	8,251	7.5
Business	518	2,578	5.0
Other	265	3,557	13.4
Total	3,248	22,420	6.9

More than two-fifths (42%) of overseas tourists were holidaymakers, who typically stayed 5.9 nights in Ireland. Visiting friends and relatives was cited by over one-third (34%) of tourists as their main reason for visiting Ireland and they stayed an average 7.5 nights. Around one-in-six (16%) of overseas trips were for business reasons, with a typical stay of five nights.

According to STR, hotel occupancy levels on the island of Ireland for the first six months of 2024 were on a par with the same time last year. Note: STR data includes both overseas and island of Ireland residents.

Access update

September 2024 GB to IOI forecast seat capacity



September 2024 total seats: 1.1m

News

- easyJet will commence two new routes – from Edinburgh and Liverpool to City of Derry Airport. Both will operate twice weekly throughout the year and will begin in November 2024.
- Loganair’s summer schedule between Glasgow and Donegal commenced with increased frequency and will now deliver year-round connectivity.

Market activity update

Inspiring Visitors

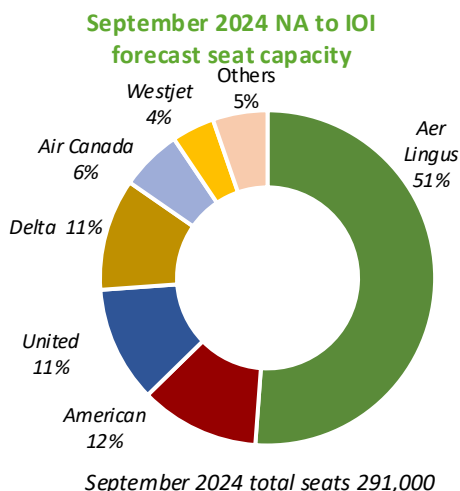
- **Fill your heart with Ireland campaign:** our campaign recommenced in August on Broadcast Video on Demand (BVOD), YouTube, digital and social, with TV to follow in September; it will deliver over 150 million opportunities to see.
- **Strengthening social following:** daily posting of quality content on social channels, with campaigns to amplify most popular posts and win new followers. Our recent campaign delivered almost 4 million opportunities to see and 9,500 new followers.
- **Ireland’s islands:** featured in *Metro* and *Bella* magazine (following a group media trip in April); and in *The Times* following a media visit to Arranmore Island. A combined 2.4 million opportunities to see were delivered.
- **Wild Atlantic Way:** coverage promoting a seven-day road trip in *The Telegraph* following a content push delivered 1.3 million opportunities to see. Length of stay and shoulder season travel were also promoted.
- **Northern Ireland:** *National Geographic Traveller* visited Northern Ireland in August to cover the food scene on the Causeway Coast. Coverage is due in early 2025, with an estimated 114,000 opportunities to see.

Strengthening Partnerships

- **Co-operative (co-op) carrier activity:** campaigns are live with Ryanair, Loganair and Stena Line, to promote autumn travel and drive incremental bookings to the regions in the shoulder and off-season.
- **Online travel agent/Metasearch partnership:** a campaign is live with TripAdvisor this August, targeting holidaymakers researching autumn breaks.
- **Award:** Tourism Ireland and TripAdvisor won gold at the Travel Marketing Awards for best audio campaign. The ‘Closer Than You Think x Wanderlab’ campaign was a Chatabox podcast about Northern Ireland. Downloads put the podcast into the top 1% of UK podcasts, with an 81% listen-through rate and 690,000 minutes of listening time.
- **A Taste of Ireland:** a new B2B event in Glasgow hosted 35 Scottish based tour operators for product updates and networking. Tourism Ireland was joined by industry partners from Northern Ireland and Donegal: Crolly Distillery, Magee of Donegal, Oakfield Park, Walled City Brewery, Ballycastle Trad Trail and The Chocolate Manor.
- **Golf:** Tourism Ireland will be joined by industry partners, including Carne Golf Club, Portrush Atlantic Hotel, Gleneagle Hotels and MyGolfGroupTravel.com, for the British Masters at The Belfry next weekend, to promote our world-class golf and the countdown to The Open at Royal Portrush in 2025.



Access update



News

United States

- Delta Airline's seasonal route from JFK to Shannon will conclude for the 2024 season on 9th September.

Market activity update

US

Inspiring Visitors

- Strengthening social following:** activity includes daily posting of quality content on social channels, with campaigns to amplify our most popular posts and win new followers; a second phase of a campaign is live in market and is proactively targeting our new 'Enrichment Explorers' audience, with the goal of 150,000 new followers by year end.
- Publicity:** Tourism Ireland invited Emmy Award winning TV host Mickela Mallozzi to film three episodes about the music and culture of the island of Ireland. These will air on PBS in spring 2025, as part of the series *Barefeet with Mickela*, with an audience reach of approximately 233 million. The show will also be distributed through Freevee, Tubi, AppleTV, Roku, as well as streaming platforms like the PBS App and PBS.org.
- Food & Travel Magazine:** published a six-page article all about the Northern Ireland food and drink scene, which delivered 81,000 opportunities to see.
- Golf publicity:** Tourism Ireland, in collaboration with Tourism Northern Ireland and Fáilte Ireland, hosted a group of high-profile golf journalists from the US and Canada (combined audience reach of 8.8 million), who played courses in Northern Ireland and County Louth.

Strengthening Partnerships

- Luxury travel – Signature Regional Conference:** Tourism Ireland met with 200+ upscale travel advisors and consortia members from Western USA during a two-day workshop in Los Angeles.
- LGBTQ+:** Tourism Ireland undertook a number of activities in June to coincide with Pride Month. These included attending the Proud Experiences trade show in Los Angeles for the first time, where Tourism Ireland met with 35 leading LGBTQ+ travel buyers; a Tourism Ireland initiated LGBTQ+ themed trade webinar in collaboration with four partners; and a group of media and influencers visited Dublin for the 50th anniversary of Dublin Pride.
- Global Travel Marketplace West and GTM Marketplace:** Tourism Ireland, together with four partners, attended the two-day workshops in Florida and Las Vegas. Events included one-to-one meetings and boardroom presentations. Tourism Ireland and partners met with 460+ buyers across both events.
- Travel Leaders Network EDGE:** Tourism Ireland attended this annual conference and marketplace attended by 3,000 delegates, which included 150+ meetings with luxury travel advisors.
- Adventure Travel Trade Association (ATTA) Adventure ELEVATE trade show:** Tourism Ireland met with 23 active/outdoor adventure buyers with an interest in expanding/programming the island of Ireland, to grow business to the regions and Northern Ireland.
- Golf: IAGTO North American Convention:** Tourism Ireland had 28 meetings with golf tour operators; and created a platform for 12 island of Ireland industry partners, including co-sponsorship of the Buyers Golf Day, to deliver a combined total of 480 meetings.



Market activity update

Canada

Inspiring Visitors

- **Fill your heart with Ireland campaign:** a campaign on Rome2Rio delivered 1.2 million+ opportunities to see in phase 1 (April-July), with content including food and drink and views and landscape delivering the best results. The second phase of the campaign will go live in September.
- **Strengthening social following:** daily posting of quality content on social channels, as well as a campaign from August to September to proactively target 'Enrichment Explorers', Diaspora and lookalike audiences to win new followers.
- **Publicity:** TV personalities Meredith Shaw and Rodney Bowers travelled to Ireland's Ancient East and Northern Ireland in July; their visit delivered extensive social posts and mentions on CityTV's *Breakfast Television* which generated 115,000 opportunities to see.

Strengthening Partnerships

- **Turning lookers into bookers/consumer partnership programme:** a digital campaign in the first half of the year, featuring five partners, delivered 3.2 million+ opportunities to see and 3,400+ referrals to partner sites.
- **Co-op marketing:** a multi-channel campaign with leading Canadian tour operator Royal Irish Tours launched in August, promoting off-peak travel to the island of Ireland via print advertising in the *Toronto Star* which reached 2 million+ potential travellers.
- **Trade webinars:** Tourism Ireland hosted two webinars highlighting Ireland's Ancient East and the Wild Atlantic Way in July, which provided six industry partners with opportunities to engage with 300+ Canadian travel advisors.

Australia

Inspiring Visitors

- **Publicity:** a TV crew filmed on location along the Wild Atlantic Way in July; the show is set to air in October on Channel 9 in Australia and will deliver more than 300,000 opportunities to see.
- **Strengthening social following:** daily posting of quality content on social channels, including a campaign that launched in August to proactively target our 'Enrichment Explorers' audience and win new followers.
- **Online custom content:** Tourism Ireland created two custom advertorials for *get lost* magazine – with a focus on the Wild Atlantic Way (800,000 opportunities to see); and with *International Traveller* magazine – with a focus on authentic experiences around the island of Ireland for its 'New Luxury' edition.

Strengthening Partnerships

- **Tour operator co-op marketing:** activity includes a multi-channel campaign with Globus Cosmos in early summer; a campaign with Travel Associates which went live in August; and a partnership with Expedia, which will launch on 1st September.
- **Webinars:** Tourism Ireland hosted the first recorded webinar of a four-part series about regions in Ireland, launching with Ireland's Ancient East and Dublin, which provided four industry partners with the opportunity to engage with 450 travel advisors.
- **Travel trade media activity:** ongoing promotion of the island of Ireland with a recent focus on golf and Northern Ireland.

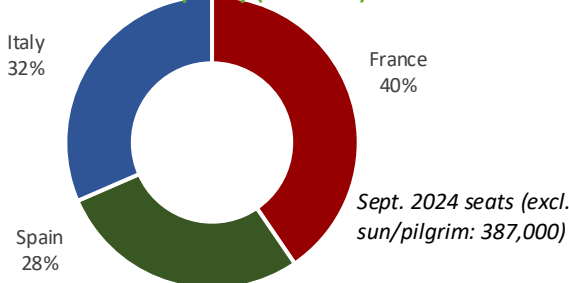


Southern Europe – France, Italy and Spain



Access update – Southern Europe

Sept. 2024 France, Spain, Italy forecast seat capacity (excl. sun)



News

France:

- Aer Lingus will increase weekly frequency from four to five flights on its Bordeaux to Dublin service, from the end of October.

Spain:

- Ryanair will extend its Barcelona to Cork service for this winter, with two weekly flights until March 2025.

Market activity update

France

Inspiring Visitors

- **Ferry campaign:** a campaign will run on Meta from the end of August, to encourage off-season travel on direct services from France to Ireland and to raise awareness on the Sail/Rail product.
- **'Ireland at your fingertips':** an immersive and accessible art experience, in partnership with the Department of Foreign Affairs for the Paris Summer Olympics/Paralympics, showcased corners of Ireland and offered glimpses into Irish culture, by exploring full 360° views and listening to audio.

Strengthening Partnerships

- **Co-op activity:** includes campaigns for Q3 running with Chlair, Brittany Ferries and Irish Ferries promoting Q4 and Q1 2025 bookings. Media channels include programmatic display, sponsored social media and owned channels promotion. A partnership with Quartier Libre, including a digital campaign on Carrefour Voyages, is also live to raise awareness and drive off-season bookings.
- **Business Events familiarisation trip:** eight MICE project managers visited the Wild Atlantic Way on a programme focused on incentive travel and Irish culture.

Italy

Inspiring Visitors

- **Golf:** a 'Golf In Ireland' tournament is taking place in eight golf clubs in Northern Italy, with digital and promotional material and Irish prizes including a golf trip to the island of Ireland.
- **Content push and media visits:** activity includes 2 TV crews on the island of Ireland and "always on" activities to inspire visitors on multiple channels including paid search, social media and online.

Strengthening Partnerships

- **Co-op activity:** includes a Wild Atlantic Way access campaign with Ryanair, promoting trips from September onwards to Shannon, Knock and Cork and targeting 61 million opportunities to see.
- **Wild Atlantic Way:** a Wild Atlantic Way access campaign is live with Lastminute.com, promoting autumn departures and targeting 2.5 million impressions and incremental bookings.

Spain

Inspiring Visitors

- **Fill your heart with Ireland campaign:** an off-season short breaks digital campaign will run from mid-September for four weeks. The campaign will showcase videos of autumn breaks in Belfast, Cork, Derry-Londonderry, Dublin and Galway. Media channels include Meta, YouTube, Teads and native placements on Taboola and Google Ads.

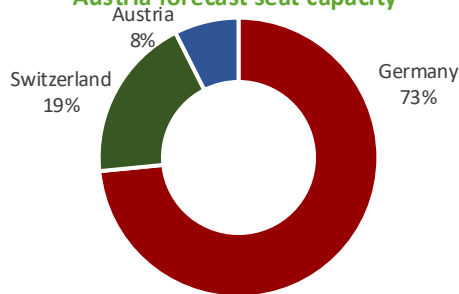
Strengthening Partnerships

- **Wild Atlantic Way:** a campaign with Ryanair promoting September travel from Catalonia, focusing on the Barcelona to Cork service, will run for four weeks from the end of August. It features digital displays delivering 17 million impressions, with email, banner ads and app placements.
- **Co-op activity:** Additionally, market trade co-op campaigns will go live from September, in collaboration with Nautalia Viajes, B Travel, and Atrápalo. Media channels include outdoor advertising in Madrid and Barcelona, screens in Fnac stores, programmatic display, sponsored social media and extensive owned channels promotion.



Access update

Sept. 2024 Germany, Switzerland, Austria forecast seat capacity



September 2024 total seats: 147,000

News

Germany:

- Air seat capacity from Germany to the island of Ireland for this September is close to last September's levels; however, it is only at 75% of September 2019 levels.

Market activity update

Germany

Inspiring Visitors

- **Fill your heart with Ireland winter promotion:** our campaign is running from mid-August to mid-September on programmatic, social, connected TV and addressable TV; media partnerships are also promoting off-season travel.
- **Ireland: Eine Lovestory Part 2:** after a successful campaign in 2023, Tourism Ireland ran a second campaign with German actor Uke Bosse. The campaign ran on social media and generated 2.1 million impressions and 1.2 million video views.
- **Podcasts:** leading travel podcast Weltwach released two episodes in July, with a focus on Irish culture, to an audience of 20,000 each. Travel podcasts Welttournee and Einfach aussteigen also released episodes, focusing on boating to a total audience of 20,000.
- **TV production:** a TV crew filmed in Ireland's Hidden Heartlands and Northern Ireland in August, for two episodes that will air this autumn to a potential audience of 1.6 million households.

Strengthening Partnerships

- **Ireland West Airport event:** a B2B networking event in Cologne promoting the Wild Atlantic Way and Ireland's Hidden Heartlands highlighted direct flights from Cologne to Knock. Forty-one (41) German travel trade and 23 industry partners from the island of Ireland participated.
- **Business Events workshop and networking event:** 47 top German MICE buyers connected with 18 industry from the island of Ireland at our B2B workshop in Hamburg.
- **BMW golf promotion in Munich:** Tourism Ireland was joined by German travel trade and island of Ireland industry on the Ireland stand to promote golf on the island of Ireland.
- **ADAC Reisen travel agents' familiarisation trip:** six travel agents from ADAC Reisen spent three nights cruising on the Shannon, visiting Clonmacnoise, Athlone, Portumna and Shannonbridge.
- **Co-op campaigns:** includes activity with Lufthansa until September, promoting its direct flight from Frankfurt to Cork, and a collaboration with Kerrygold at an event in Cologne.

Austria and Switzerland

Inspiring Visitors

- **Paid editorial placement:** has been running for four weeks from the end of July on the website of a national newspaper in German and French speaking regions of Switzerland.
- **Hiking:** a media visit this July resulted in hiking themed content from Cork being shared with an audience of 31,000.

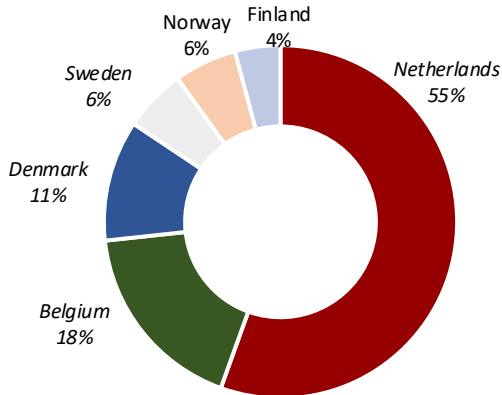
Strengthening Partnerships

- **Co-op activity:** a co-operative campaign is live, online and outdoor, with Edelweiss, promoting its Zurich to Cork service.
- **Roadshow:** eight tourism industry partners – representing all experience brands and a variety of sectors – will join our roadshow in Linz, Vienna, Zurich and Lausanne this autumn.



Access update

Sept. 2024 Northern Europe to IOI forecast seat capacity



September 2024 total seats: 155,000

News

Netherlands and Belgium

- KLM will expand its service from Amsterdam to Belfast City Airport to a twice daily, year-round flight from 28 October.

Market activity update

Netherlands and Belgium

Inspiring Visitors

- **Fill your heart with Ireland campaign:** an off-season city break campaign promoting Dublin, Belfast and Cork in the Netherlands, and Dublin and Cork in Belgium, is live until mid-September across programmatic and social channels.
- **Belgian PR activities:** in support of the new Ryanair Charleroi to Cork flight, articles featured in leading titles including *Knack* magazine, *Le Vif* (magazine) and *Plus Magazine* (combined reach of nearly 850,000) inspiring Belgian audiences to consider Cork city for a gastro weekend break and Cork as the entry point to the Wild Atlantic Way one a trip to the island of Ireland.
- **Influencer activities:** a leading Dutch influencer (220,000 fans) travelled to Galway and the Aran Islands and published a full city guide about Galway. Three leading Dutch influencers will travel to Clare and Galway as part of our ongoing WAW 10 campaign activity.

Strengthening Partnerships

- **Golf:** Tourism Ireland, together with Fáilte Ireland, Tourism Northern Ireland and industry partners, hosted nine key Dutch golf operators at the KLM Open this summer.
- **Partnership activities:** includes with Dutch tour operator Buro Scanbrit, promoting autumn breaks to the island of Ireland via social media and display advertising as well as via media partnerships with Naturescanner and Map of Joy. Activity is also live with Skyscanner in Belgium and the Netherlands, promoting autumn city breaks and direct flights to Cork, Dublin and Belfast.

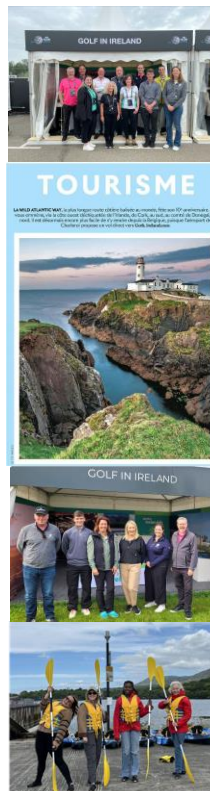
Nordics

Inspiring Visitors

- **Sustainability campaign:** a dedicated sustainability campaign delivered over eight million opportunities to see, with a specific focus on the Boyne Valley.
- **Media visits:** Seven journalists visited in June from various tier one media outlets, including *Berlingske* newspaper (reach of 86,000) and *Expressen Allt* newspaper (reach of 120,000). The visits included experiences around themes such as cycling, sustainability and road trips.

Strengthening Partnerships

- **Golf DP World Tour:** Three industry partners joined us at the Scandinavian Mixed DP World Tour event in Sweden this summer.
- **Golf Gamebook partnership:** completed first phase of activity with Golf Gamebook, the leading golfing app in the Nordic countries, which delivered 225,000 impressions and a 'Golf in Ireland' dedicated email to the Golf Gamebook database of 154,000.
- **Co-op activity:** co-op activity is live with Swedish operator HereWeGo; and planning is in place for Q4 off-season city breaks co-op activity.



Definitions:

1 – *Opportunities to see*: refers to the number of times an advertisement has the chance to be seen by our audience (for example, if an ad is displayed on a website, on a social feed or pre-roll video content, each time someone encounters that ad counts as an opportunity to see).

2 – *Reach*: measures the total number of unique individuals exposed to an ad and is a percentage of the total target audience (for example, if a TV ad airs during a show, the reach is the number of different viewers that saw the ad at least once).

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