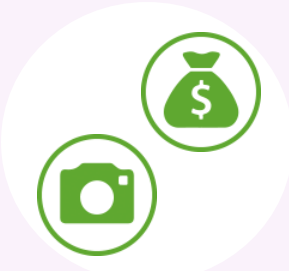


SOAR

(Situation & Outlook Analysis Report)


March 2025




The International Monetary Fund's (IMF) latest [world economic outlook update](#) forecasts global growth of +3.3% in 2025. The overall picture, however, hides divergent paths across economies. In the United States, demand remains robust, reflecting a less restrictive monetary policy stance and supportive financial conditions. In the euro area, growth is expected to pick up but at a more gradual pace, with geopolitical tensions continuing to weigh on sentiment. Global headline inflation is expected to decline to +4.2% in 2025, converging back to target earlier in advanced economies than in emerging market and developing economies.




Scheduled seat capacity to the island of Ireland for winter 2024/25 sits at 99% of last winter's levels, based on OAG filings. While regional and Northern Ireland airports are showing capacity growth, Dublin – as the largest airport – has 96% of the seat capacity it had in winter 2023/24, due to the airport cap applied this winter. While there is a 'hold' for legal consideration on the airport cap for summer 2025, there is still impact from applying the cap this winter. Island wide, air seat capacity for this winter from Great Britain and North America has dipped to 97% and 96% respectively of winter 2023/24 levels.



The Central Statistics Office (CSO) reported overseas tourists last year generated €6 billion for the economy, an +11% increase on 2023. Close to 6.6 million overseas tourists visited Ireland, a +5% increase year on year. These overseas tourists stayed just over 49 million nights, down -4%, despite growth of +8% in holiday nights due to a softening in nights by other types of tourists. The average length of stay was 7.5 nights, which is down slightly. While revenue growth is positive, industry challenges include increased costs and changes to spread of visitors, based on length of stay and accommodation availability. The CSO has since published January 2025 figures, reporting that Ireland welcomed 339,000 overseas visitors spending €214 million in the first month. Looking at the trend compared to 2024 however, we see a softer start this year versus last year. Influencing factors include cost for consumers, as well as air access, in an uncertain macroeconomic environment.



According to UN Tourism's latest [World Tourism Barometer](#), an estimated 1.4 billion tourists (overnight visitors) travelled internationally in 2024. This was +11% more than 2023, with revenue growing +3% according to preliminary estimates. The growth was driven by strong post-pandemic demand, robust performance from large source markets globally, as well as the ongoing recovery of destinations in Asia and the Pacific. International tourist arrivals are expected to grow by +3% to +5% in 2025. High transport and accommodation costs, and other economic factors such as volatile oil prices, are cited as the main challenges international tourism will face in 2025. Against this backdrop, tourists are expected to continue to seek value for money.



Tourism Ireland will invest in an extensive and targeted programme of activity across 13+ overseas source markets in 2025. Sustainable development is at the core of our plans, so there will be continued focus on attracting tourists who have 'value adding tourism traits' – people who are likely to see more, do more, enjoy more and therefore spend more when they visit. We will also unveil a new global advertising campaign this year, which will refresh and build on the strong foundations of our 'Fill your heart with Ireland' campaign, based on consumer insights – to make the island of Ireland stand out as a 'bucket list' destination.

2025 Forecast Economic Outlook trended by month

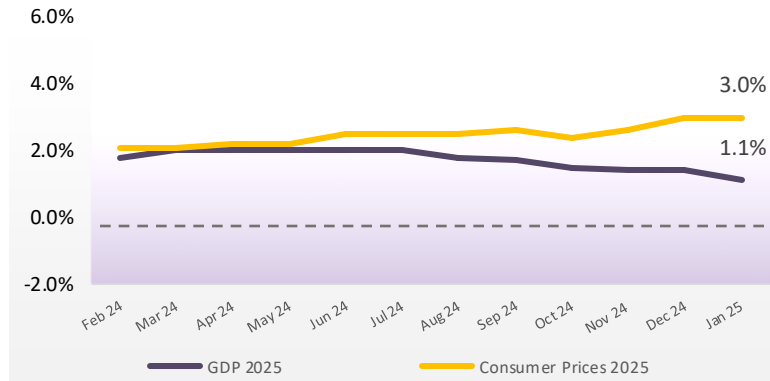
Source: Oxford Economics

Great Britain

Oxford Economics has reduced its 2025 GDP growth forecast for the UK to +1.1% in response to unfavourable historical revisions and a run of softer monthly data. Inflation is likely to average +3% this year. Oxford Economics anticipates firms will try to pass on some of the extra costs from last April's increase in employers' national insurance contributions in the form of higher prices.

Exchange rate

Feb '24 £1 : €1.17 Feb '25 £1 : €1.20

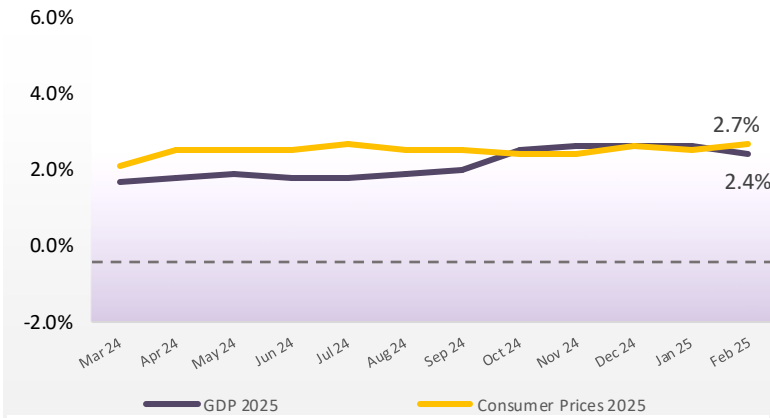


US

The US economy is doing well but will continue to be tested by heightened trade policy uncertainty, notably around the imposition of tariffs. There are direct and indirect economic costs of tariffs and the indirect costs are already creating negative implications for the US economy. Oxford Economics has downgraded its US GDP growth forecast marginally to +2.4% in 2025.

Exchange rate

Feb '24 \$1 : €0.92 Feb '25 \$1 : €0.96
Feb '24 \$1 : £0.79 Feb '25 \$1 : £0.81

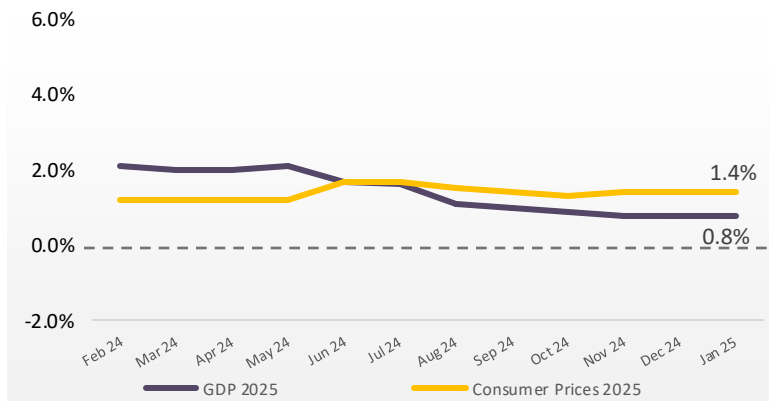


France

Oxford Economics forecasts that GDP will only grow by +0.8% in 2025, given that sentiment remains subdued and the economy is showing renewed signs of weakness. Business sentiment continues to deteriorate, as firms suffer from political instability and subdued demand. Similarly, consumer confidence is falling further, as households are increasingly worried about the state of the labour market.

Exchange rate

Feb '24 €1 : £0.85 Feb '25 €1 : £0.84

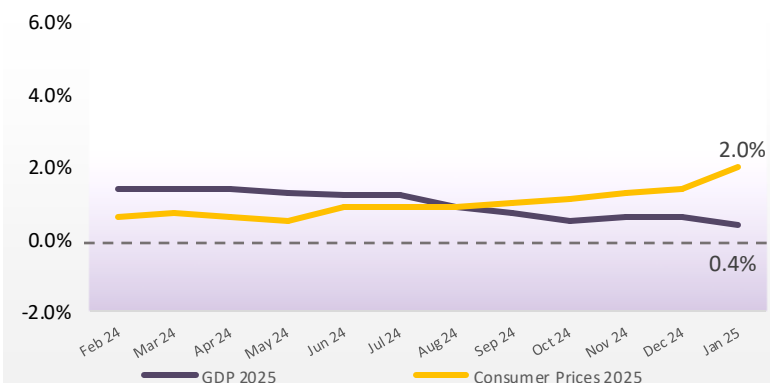


Germany

Oxford Economics has cut its GDP growth forecast for Germany to just +0.4% this year. Surveys indicate that industrial malaise continues, while higher inflation undermines the consumer recovery. The latest industrial activity and retail sales data is more positive. However, Oxford Economics doesn't see that as a turning point, as economic policy remains restrictive, trade uncertainty is elevated and labour market risks skew to the downside.

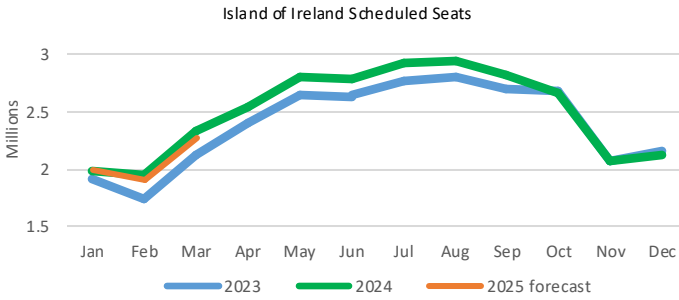
Exchange rate

Feb '24 €1 : £0.85 Feb '25 €1 : £0.84



Island of Ireland Access Situation

OAG Scheduled Seat Capacity Winter* 2024/25



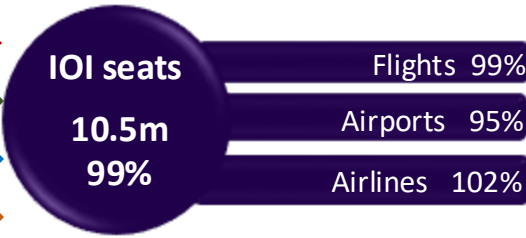
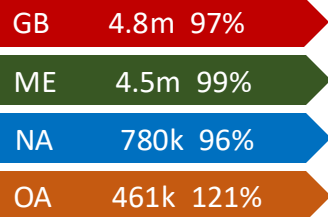
Based on OAG filings, scheduled air seat capacity to Ireland is filed at 98% of last winter's levels, with Northern Ireland scheduled at 103%, which is principally due to more seats from Mainland Europe.

*The winter season runs from the last Sunday in October to the last Sunday in March.

Seat capacity to the island of Ireland for winter 2024/25 is scheduled at 99% of the level it was last winter season.

Air Access Winter 2024/25 – % share of Winter 2023/24

IOI Seat Capacity



OAG's scheduled air seat capacity from GB (97%), Mainland Europe (99%) and North America (96%) to the island of Ireland is marginally behind last winter's levels. Seat capacity from Other Areas (121%) is above last winter, driven by sun routes.

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

Source: OAG 4 February

Airport Seat Capacity Forecast – Winter 2024/25

According to OAG, Dublin Airport (96%) is the only airport with fewer seats scheduled for this winter than last winter. The Dublin Airport passenger cap is impacting seat capacity this winter season. Cork and Shannon Airports are both scheduled at 107% and 106% respectively of last winter's levels. Kerry and Knock are filed at 111% and 107% respectively and Donegal has overseas seats this winter.

Belfast City Airport and Belfast International Airport are filed at 100% and 102% respectively of winter 2023/24 levels. City of Derry Airport is scheduled at 192%.

Airports	Winter 2023/24 seats	Winter 2024/25 seats	24/25 % share of 23/24
Belfast Intl.	1,475,335	1,497,757	102%
Belfast City	631,885	634,012	100%
City of Derry	32,634	62,701	192%
Dublin	7,239,989	6,983,094	96%
Cork	631,584	675,729	107%
Shannon	401,177	425,338	106%
Knock	182,664	194,762	107%
Kerry	51,853	57,360	111%
Donegal	0	2,424	N/A
Total	10,647,121	10,533,177	99%

Ferry Performance – January - December 2024

Ferry passenger numbers on GB routes to and from the island of Ireland in 2024 were at 95% of 2023 levels. The suspension of Stena's Fishguard-Rosslare service for a period last year, adverse weather in April, the closure of Holyhead Port in December and changes in the size of some ferries 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)	2023	2024	2024 % share of 2023
GB – island of Ireland			
Sailings	19,380	17,696	91%
Passengers	4,231,303	4,037,159	95%
Cars	1,234,001	1,170,978	95%

Ferry Passenger Traffic	2024 % share of 2023
Northern Ireland	98%
Ireland	92%
Island of Ireland	95%

CSO Inbound Tourism to Republic of Ireland (Direct)

The CSO now releases monthly Inbound Tourism statistics, replacing the former Overseas Travel series and the quarterly 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.

The Central Statistics Office (CSO) have released inbound tourism statistics to Ireland for 2024. Percentage and volume changes in the tables below compare January to December 2024 with the same period in 2023.

Annual: CSO Inbound Tourism Ireland (Direct) January – December 2024

Market Area	Spend* (€m's)	% Change	Trips (000's)	% Change	Nights (000's)	% Change	Av. Stay (Nights)	# Change	Av. Spend Per Trip* (€)	% Change
Great Britain	1,241	+9%	2,440	+3%	11,818	-5%	4.8	-0.4	509	+6%
North America	2,195	+19%	1,439	+10%	12,520	+12%	8.7	+0.1	1,526	+8%
Mainland Europe	2,077	+8%	2,348	+5%	18,747	-11%	8.0	-1.4	885	+3%
Other Areas	516	-2%	365	+7%	6,057	-5%	16.6	-2.1	1,415	-8%
Total	6,029	+11%	6,592	+5%	49,142	-4%	7.5	-0.7	915	+5%

In 2024, Ireland welcomed nearly 6.6 million overseas tourists (+5%), generating €6 billion for the economy (+11%), staying just over 49 million nights (-4%) in Ireland. This reduction in nights was driven by a softening in length of stay from those visiting friends and relatives primarily. Holiday nights were up +8%.

On average, these overseas tourists typically stayed a week (7.5 nights), down from 8.2 nights in 2023 and spent €915 per trip (+5%).

Annual: CSO Inbound Tourism Ireland (Direct) January – December 2024

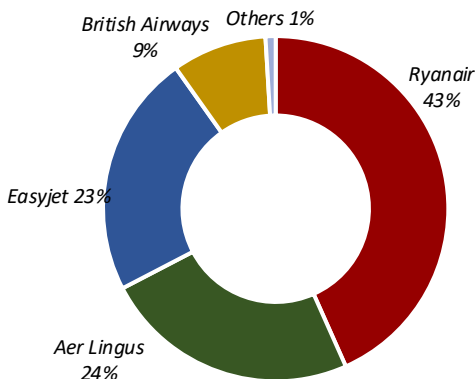
Purpose of Visit	Trips (000's)	% Change	Nights (000's)	% Change	Av. Stay (Nights)	# Change
Holiday	2,809	+11%	18,576	+8%	6.6	-0.2
Visiting Friends/Relatives	2,200	-4%	17,271	-9%	7.9	-0.4
Business	992	+8%	5,138	-11%	5.2	-1.1
Other	591	+17%	8,158	-11%	13.8	-4.4
Total	6,592	+5%	49,142	-4%	7.5	-0.7

Over two-fifths (43%) of overseas tourists were holidaymakers, who typically stayed 6.6 nights in Ireland. A third (33%) of overseas tourists cited visiting friends and relatives (VFR) as their main reason for visiting Ireland and they stayed an average of 7.9 nights. Around one in seven (15%) overseas trips were for business reasons, with a typical stay of 5.2 nights. According to STR, hotel occupancy levels on the island of Ireland for 2024 were on par with last year. STR data includes residents from both overseas and the island of Ireland.

The CSO has since reported 339,000 overseas tourists visited Ireland in January 2025, spending €214 million. Looking at the trend compared to 2024 however, we see a softer start this year versus last year. Influencing factors include cost for consumers as well as air access, in an uncertain macroeconomic environment.

Access update

Winter 2024/25 GB to IOI forecast seat capacity



Winter 2024/25 total seats: 4.8 million

News

- Irish Ferries and Stena Line have resumed full services to Dublin from Holyhead port. Holyhead was closed after damage caused during Storm Darragh. Operations are taking place from Terminal 5 on a temporary basis, until full repair works can be carried out at Terminal 3.

Market activity update

Inspiring Visitors

- Fill your heart with Ireland H1 campaign:** our campaign will run from February to April across TV, BVOD (broadcast video on demand), SVOD (subscription video on demand), social and digital, generating 125 million quality opportunities to see.
- Publicity:** recent highlights include a St Brigid's feature in *The Independent* (1.28 million opportunities to see); a Connemara feature in *The Times* (1.2 million opportunities to see); a Dublin Coastal Trail four-page feature in *Coast magazine* (82,000 opportunities to see); inclusion of TradFest in *The Times* (1.2 million opportunities to see) and St Patrick's Way in *The i* (1 million opportunities to see). Extensive coverage around 2025 tourism news and updates has been generated in 23 regional titles including the *Liverpool Echo* (156,000 opportunities to see) and *Birmingham Mail* (245,000 opportunities to see).
- Media trips:** which will generate upcoming coverage include *Timeout* (covering a cultural guide to Dublin), *Songlines* magazine (TradFest) and *National World* (St Brigid and St Patrick travel guides); the combined opportunities to see will be around 2 million.
- St Patrick's Day:** plans are being finalised and include a 'radio day' to promote the 10-year anniversary of the St Patrick's Way in Northern Ireland, as well as in-market Greenings.
- Golf's Greatest Holes:** The Open Special (co-produced by Tourism Ireland) premiered on Sky Sports on 28th January. The six-part series features Paul McGinley, Chris Hollins, Darren Clarke and James Nesbitt taking on the Dunluce Links at Royal Portrush. Attractions featured include the Giant's Causeway and Titanic Belfast.

Strengthening Partnerships

- KAYAK partnership:** activity is live with KAYAK (travel search engine), targeting competitor destinations to drive incremental passengers to the island of Ireland.
- Co-operative (co-op) access campaigns:** 2025 planning and meetings are under way with Ryanair, Stena Line, Irish Ferries, P&O Ferries, Loganair and Emerald Airlines.
- Caledonian Travel co-op campaign:** activity, which included regional TV (Scotland) and direct mail, was live during January/February. A second burst of activity is planned for April/May, promoting itineraries around the island of Ireland to drive incremental bookings.
- GB market trade co-op:** campaigns are under discussion with Glenton Holidays, Eclipse, Just Go!, National Holidays, Loch Lomond Travel, Barrhead Travel and Scenic Car Tours.
- Celtic Connections, Glasgow:** 35 island of Ireland industry partners met with 28 GB-based tour operators at the end of January, for a one-day B2B workshop and networking; around 702 meetings were facilitated to drive future sales growth and island of Ireland itinerary development.

KAYAK



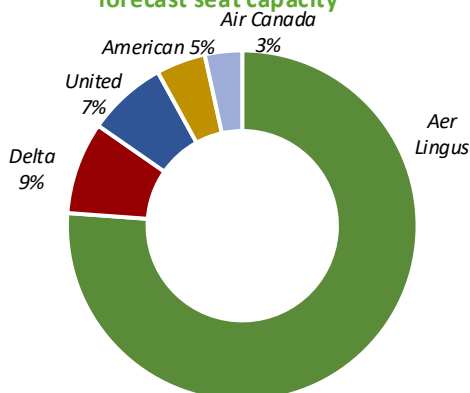
Forget St Patrick's Day - here's why you should head to Ireland for St Brigid's Day instead



Ireland

Access update

Winter 2024/25 NA to IOI forecast seat capacity



Winter 2024/25 total seats 781,000

News

United States

- Three new routes will launch: Aer Lingus will operate new flights from Nashville and Indianapolis to Dublin and Delta will commence a Detroit to Dublin service.
- United Airlines will increase its capacity to Ireland by +40% compared to last year. It will operate larger aircraft on its Chicago and Newark routes and will introduce a second daily flight from Washington DC to Dublin.

Canada

- WestJet will commence its new St John's to Dublin service in May.

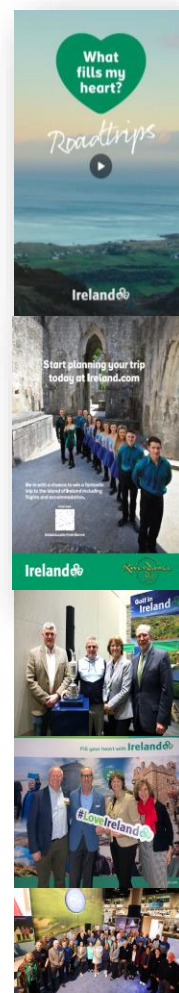
Market activity update – United States

Inspiring Visitors

- **Fill your heart with Ireland campaign:** our kickstart campaign ran for three weeks to stimulate 2025 bookings during a key holiday planning timeframe. The TV campaign aired in key gateway cities with direct access and was complemented by ads on Connected TV and digital channels across 16 US states, generating 100 million opportunities to see.
- **Fill your heart with Ireland H1 2025 campaign:** our campaign is running on TV, Connected TV, digital and social (from 18th February to 31st May) in 20 states with direct flights to Ireland and will deliver an estimated 155 million quality opportunities to see.
- **Riverdance:** a Tourism Ireland partnership to celebrate the 30th anniversary tour of Riverdance kicked off in January. A destination video is being screened at shows in 22 cities to a projected audience of 415,000. A competition and interactive QR code is forecast to deliver 50,000 visits to Ireland.com.
- **PGA Show media event:** Tourism Ireland hosted a media event at the PGA show in Orlando in January, which was attended by 80 top golf journalists. Attendees from outlets such as Golf Digest, the Golf Channel and Golf.com participated in a panel discussion chaired by Matt Ginella. Former Ryder Cup Captain Paul McGinley also addressed the event, placing a special focus on Donegal. Tourism Ireland completed a full schedule of media interviews with key outlets, in particular highlighting this summer's Open Championship and Ryder Cup 2027.
- **TravMedia IMM Conference (New York):** Tourism Ireland attended this important global networking event connecting the travel industry with editors, journalists, broadcasters and content creators. Activity included 1:1 introductory interviews with 25+ key journalists/content creators for future opportunities to work with Tourism Ireland.
- **Marketing Plans Launch:** Around 100 key stakeholders (trade, business events and media) attended the US launch of Tourism Ireland's marketing plans for 2025 on 11th February in New York. Attendees were briefed on key strategic objectives for the year ahead, campaign highlights and opportunities to collaborate. Media guests from major outlets including PBS, National Geographic and CBS Radio heard great 2025 story ideas including the St Patrick's Festival, The Open Championship and Ireland – Home of Halloween.

Strengthening Partnerships

- **USTOA:** we strengthened partnerships with leading tour operators at the United States Tour Operators Association annual conference and marketplace. Tourism Ireland hosted the opening reception to spotlight the many unique reasons to visit the island of Ireland in the shoulder season, stay longer, get off-the-beaten track and explore our regions. 120+ US tour operator representatives attended, together with Tourism Ireland and six island of Ireland industry partners.
- **PGA Merchandise Show, Orlando:** 33 golf and tourism partners exhibited under the 'Golf in Ireland' brand, showcasing our world-class golf, with a special focus on the return of The Open to Royal Portrush this summer and the 2027 Ryder Cup at Adare Manor. Teams met with leading golf professionals, US tour operators and journalists. The show was attended by 30,000 golf professionals.



Market activity update

USA (continued)

- **'Best of Ireland' sales mission:** took place at the end of February in Seattle, San Francisco, Newport Beach and San Diego. Tourism Ireland was joined by 18 island of Ireland and tour operator partners, as well as Aer Lingus, showcasing the island of Ireland to 200+ travel advisors and 30+ media contacts.
- **Travel trade webinars:** Tourism Ireland's monthly programme continues and included a 'Golf in Ireland' theme in January and a 'Screen Tourism' theme in February. This is a platform for four island of Ireland partners to participate in each webinar to showcase their product to 300+ travel agents.

Canada

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** the first phase of our 2025 campaign launched in early February on various platforms including Amazon Prime, Netflix, YouTube and Meta, with a goal to reach 37 million+ consumers across Canada. The campaign will also incorporate a tactical partnership programme involving six partners with promotions on Meta, Ireland.com and via email.
- **Broadcast:** a crew from *Adventures Unknown* (adventure travel show) filmed in Ireland in February to produce three one-hour episodes. These episodes will air on NTV and be syndicated nationwide, reaching an audience of 300,000 to 500,000+ viewers per episode.

Strengthening Partnerships:

- **Ballymaloe House in Canada:** chef JR Ryall of Ballymaloe House visited Toronto in partnership with Tourism Ireland and others, to raise awareness of Irish cuisine and its deep connection to the Irish landscape. 80 consumers and media attended a three-hour event, with coverage about the event generated in trade publications and with interviews with the *National Post* and *Toronto Sun*.

Australia

Inspiring Visitors:

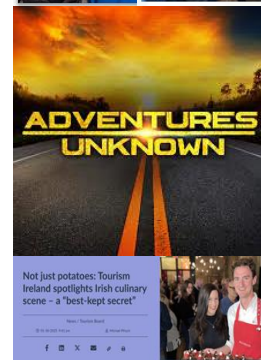
- **Fill your heart with Ireland campaign:** the first phase of the 2025 campaign commenced in February. This campaign will run on Meta, YouTube, Netflix and Spotify; it will also include a partnership with Concrete Playground, a digital travel guide, to produce campaign articles and videos.
- **Partnership Programme:** our Australian travel trade partners can buy into a digital programme to promote their offers and packages in Australia. Partner offers will be promoted on Tourism Ireland's organic channels, as well as on paid channels with local media partner Kayak Australia. The programme went live in February.
- **Vacations & Travel magazine:** a double-page advertorial about Ireland's Hidden Heartlands ran in the latest edition of *Vacations & Travel* magazine. TradFest was also attended by a local journalist and it will feature in the next issue.
- **Print coverage:** following a media trip last year, an article on Belfast and its music scene was featured in *Sunday Times Perth* in January, reaching an audience of over 368,000.
- **IMM:** Tourism Ireland will attend TravMedia's International Media Marketplace (IMM), which will be attended by over 200 media with one-to-one meetings scheduled.

Strengthening Partnerships

- **Travel trade media:** a page about spring in Ireland appeared in *Travel Daily* in January.
- **Entire Travel Group:** Tourism Ireland was a destination partner at the Entire Travel Group events in Melbourne, Sydney and Brisbane in mid-February; each event was attended by 100+ travel agents.



- IRELAND WEBINAR -
Golf in Ireland



Access update – Southern Europe

Winter 2024/25 France, Spain, Italy forecast seat capacity (excl. sun/ski)



Winter 2024/25 seats (excl. sun/ski): 1.1 million

News

France:

- Chalair will launch a new route from Brive in France to Kerry, every Sunday from 29th June to 14th September.

Spain:

- Aer Lingus will operate a new route from Bilbao to Cork from 16th April, operating three times per week.
- Aer Lingus has also extended services from Seville to Dublin.

Market activity update

France

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** a TV and sponsorship TV campaign will run on France TV and TF1 this spring. A digital campaign will also run across online video and catch-up TV platforms (YouTube, Netflix, TF1, France Television, Arte and L'Équipe) and social (Facebook and Instagram). The digital campaign will generate 33 million quality opportunities to see.

Strengthening Partnerships:

- **Lunch & Learn events:** Tourism Ireland hosted two Lunch & Learn events in Bordeaux and Toulouse, with 10 island of Ireland partners and 20 French buyers attending in each city.
- **Travel agent promotion:** together with Kuoni (tour operator), we are promoting the island of Ireland to travel agents in the French regions of Angers and Troyes.
- **Lyon airport workshop:** Aer Lingus and Tourism Ireland hosted a workshop at Lyon Airport, with 300 travel agents attending.
- **Co-op activity:** includes a campaign with Brittany Ferries and a partnership with Directours.
- **Northern Ireland webinar:** this webinar focused on the 'must sees of Northern Ireland', with five industry partners from Northern Ireland and 65 French travel trade participating.

Italy

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign is live, promoting spring holidays on Meta and YouTube, and will deliver an estimated 15 million quality opportunities to see.
- **Ireland Week 2025 (9th -17th March):** Tourism Ireland will host a press conference to launch Ireland Week 2025 and the full programme of events set to take place, including an Experience Ireland showcase with 12 island of Ireland industry partners meeting with Italian trade, media and consumers.

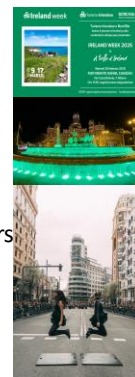
Spain

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign will run in March and April on Meta, YouTube and online video channels, generating 43 million quality opportunities to see.
- **Semana de Irlanda:** Ireland Week (10th-17th March) will involve a 'takeover' of Madrid, with music and dance performances at Metro stations, a major parade along Gran Vía, travel store events and other fun and surprising activities in celebration of St Patrick's Day. These events aim to generate media attention and inspire visitors to travel to the island of Ireland.

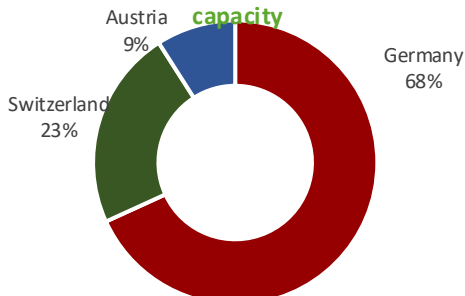
Strengthening Partnerships:

- **Twinned region:** a webinar took place on 13th February with Agenttravel and three industry partners, to shine a spotlight on Ireland's Ancient East and Belfast to around 300 Spanish travel agents.
- **Experience Ireland trade showcase:** this event will take place on 12th March in Madrid, with eight industry partners meeting with Spanish travel buyers and highlighting compelling reasons for their clients to choose the island of Ireland.



Access update

Winter 2024/25 Germany, Switzerland, Austria forecast seat capacity



Winter 2024/25 total seats: 651,000

News

Germany:

- Eurowings will begin a new service from Stuttgart to Dublin at the end of March, operating four times a week.
- Lufthansa will increase the frequency of its Frankfurt to Cork service, with one extra day per week, and will also commence the service earlier in the season this year.

Market activity update

Germany

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** following a kickstart campaign which included ads running on TV and digital, a new phase of the campaign kicked off in the middle of January on digital, social media and Connected TV, delivering around 20.6 million quality opportunities to see.
- **CMT Stuttgart:** Tourism Ireland and partners attended one of Germany's biggest consumer travel fairs (CMT) in Stuttgart in January; the fair attracted around 300,000 visitors. Industry partners from the island of Ireland and German tour operators joined Tourism Ireland to facilitate on-the-spot bookings and inspire German travellers to visit the island of Ireland.
- **Partnerships:** activity includes partnerships with Lufthansa City Center, Wolters, Weg.de, ASI and DERTOOUR.
- **Content creator trip:** together with tour operator Wolters Rundreisen, we invited six content creators to visit Northern Ireland in February.
- **Award:** Tourism Ireland won an award at CMT Stuttgart for connecting cultures – for our campaign with Culture Ireland last year around Zeitgeist Irland 24.

Strengthening Partnerships:

- **DERTOOUR Roadshow:** Tourism Ireland and five island of Ireland industry partners took part in a DERTOOUR roadshow in early February, connecting with 250 travel agents in Munich, Frankfurt and Cologne.
- **Familiarisation trip:** a Business Events familiarisation trip took place at the end of February, bringing 10 travel agents (all members of the Lufthansa City Center network) to explore Dublin and Ireland's Ancient East.

Austria and Switzerland

Inspiring Visitors:

- **Consumer fairs:** Tourism Ireland partnered with Kneissl Touristik at the Vienna Travel Fair, which attracted 77,000 visitors. We also partnered with RMR at consumer travel fairs in Bern and Zurich, which were attended by over 60,000 prospecting holidaymakers.
- **Media trips:** include visits by Swiss and Austrian journalists to TradFest; and a St Brigid's Day / Christian and Celtic heritage themed group press visit with four Swiss journalists.

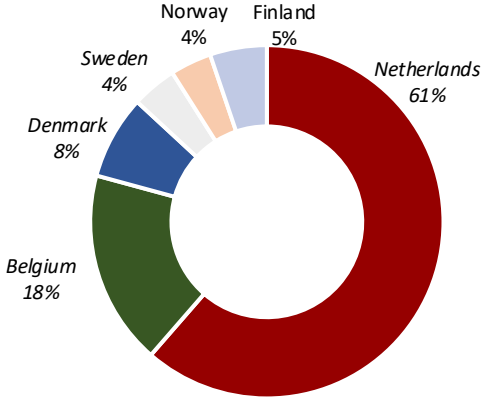
Strengthening Partnerships:

- **St Brigid's Day:** was an opportunity to join with cultural organisations and DFA in Bern and Zurich, to deliver music and spoken word events and a slow tourism message through collaboration with the Burren Smokehouse.



Access update

Winter 24/25 Northern Europe to IOI forecast seat capacity



Winter 2024/25 total seats: 744,000

News

The Netherlands and Belgium:

- Emerald Airlines will launch a new weekly service from Groningen (in the Netherlands) to Knock Airport, running every Saturday for 13 weeks from June to August 2025. The route will be operated by the Dutch tour operator BBI Travel.

Nordics:

- Ryanair has announced that it will close its base at Billund Airport in Denmark from the end of March, with the loss of a Dublin route.

Market activity update

The Netherlands and Belgium

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign is live on Meta, YouTube and Pinterest, in the Netherlands and Belgium (Vlaanderen only). It aims to reach around 9.5 million Enrichment Explorers.
- **Gastronomic destination:** Ireland featured as a superb gastronomic destination in a popular culinary travel TV show called *Sergio over de grens* (meaning 'Sergio across borders'), in which Dutch chef Sergio Herman explored Connemara and Galway. The episode aired in early February on VTM and VTM GO, reaching approximately 500,000 viewers.

Strengthening Partnerships:

- **Partnerships:** our current focus includes ongoing partnerships with key Dutch and Belgian tour operators, to support the marketing and sales of their new island of Ireland programmes for 2025.
- **Meet the Maker – Ireland showcase:** will take place on 13th March in the Hague, with five island of Ireland industry partners meeting with key media and travel trade, highlighting compelling reasons to choose the island of Ireland.

Nordics

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our online campaign ran on Meta until 26th February, with a goal to reach around 6.2 million Enrichment Explorers in Sweden and Denmark.
- **Publicity:** Dublin and Cork will feature in *Elle* (Swedish edition), reaching 105,000 readers. A journalist from Danish title *Out and About* visited County Clare in February, to attend The Outing Festival and explore the Wild Atlantic Way.

Strengthening Partnerships:

- **Tradeshaw:** Tourism Ireland attended the Icelandair Mid-Atlantic Tradeshaw, promoting the island of Ireland to eight Nordic tour operators.
- **Annual trade workshop:** our annual B2B trade workshop took place in February in Copenhagen, with 25 industry partners meeting with around 40 Nordic tour operators.
- **Co-op campaigns:** activity kicked off in February with Rolfs Buss, Sweden's largest group tour operator, to promote its island of Ireland tours for 2025.



Videos



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).

Tourism Ireland

Bishop’s Square
Redmond’s Hill
Dublin 2
Ireland
D02 TD99

T: +353 1 476 3400
E: info@tourismireland.com

Tourism Ireland

Beresford House
2 Beresford Road
Coleraine
Northern Ireland
BT52 1GE

T: +44 28 7035 9200
E: corporate.coleraine@tourismireland.com

More information:

www.tourismireland.com
www.Ireland.com