

SOAR

(Situation & Outlook Analysis Report) March 2026



McDermott's Castle, County Roscommon

HEADLINES

- The CSO is reporting 834,000 overseas tourists to Ireland, spending a total of €538 million, during January and February 2026, representing increases of +30% and +31% respectively, compared to January and February 2025. Caution is advised when making any inferences on this two-month data point and these visits were made prior to the outbreak of the conflict in the Middle East.
- The ongoing conflict in the Middle East has serious implications for global economies and for tourism in the months ahead. Primary considerations for inbound tourism to the island of Ireland include:
 - Airspace has been disrupted, with around €450 million of visitor spend annually to the island of Ireland coming from residents of the Middle East, Asia and Australia/New Zealand, who are heavily reliant on the Middle East air corridor. Air routes from Asia and Australia/New Zealand are likely to re-route to a degree, but with cost and distance implications.
 - Oil and gas price inflation will feed into cost concerns for consumers and businesses, while jet fuel increases pose a risk to aviation connectivity.
 - Consumer uncertainty is likely to be heightened regarding safety to travel and confidence to spend. The island of Ireland is at some geographical distance from the conflict and has traditionally been seen as a warm, friendly destination, albeit competitiveness is likely to be a pressure point.
- Air seat capacity to the island of Ireland for the summer aviation season (end March 2026 to end October 2026) still remains broadly unchanged since the conflict began, with seat capacity scheduled to grow +4% YoY overall, according to OAG filings on the week commencing 23rd March. However, the full implications of the conflict in the Middle East are yet to be determined and schedules remain subject to change as the season unfolds.
- The latest NISRA figures for Northern Ireland (January – September 2025) show marginal growth on revenue and visitor volumes (+1%) from overseas, led by Great Britain (+4% trips and +10% revenue) and with volume increases from North America (+4%), albeit revenue trends have lagged visitor growth trends. Full year results for 2025 are due in May.
- Tourism Ireland is undertaking an extensive and targeted programme of promotional activity across 15 key overseas markets in 2026, supported by our new campaign 'Ireland Goes Beyond'.

Global Travel Disruption: Middle East Conflict



The Global Travel Effects

The current conflict in the Middle East began on 28th February, with an immediate impact on travel resulting in widespread airspace closures and restrictions across a critical aviation corridor.

The Middle East is a vital global aviation transit bridge, accounting for approximately 14% of global international transit traffic. Disruption has generated system-wide impacts well beyond the region, particularly on connectivity from Asia and Australia to Europe.

The Australian, Chinese and Indian governments have advised against travel to the Middle East region. The Irish and UK governments also advise against all non-essential travel across much of the region.

Consumer confidence has softened, with the GfK Consumer Confidence Index in the UK in March dropping to a 11-month low.



Macro Economy

Macro environment 24 Mar 2026 v 27 Feb 2026	
Oil per barrel	+50%
USD → GBP	0%
USD → EUR	+2%
GBP → EUR	+1%
Gold USD/oz	-17%
Dow Jones (US)	-6%
DAX (Germany)	-13%
CAC (France)	-11%
FTSE 100 (UK)	-11%
Hang Sang (HK)	-8%



Air Access

Air seat capacity to the island of Ireland from the Middle East accounts for approximately 3% of all air seats to the island of Ireland. Carriers are currently operating at reduced or intermittent capacity, prioritising repatriation over commercial traffic.

British Airways, KLM, Air France, Lufthansa Group, Finnair, LOT, Virgin Atlantic and many Asian carriers have extended suspensions to the region into late spring and summer (signaling expectations of prolonged instability rather than short-term disruption).



Travel Sentiment in our Core Markets

Middle East disruption is affecting routes, costs and convenience, with higher fares on key routes between Europe and Asia/Australia, longer journey times and common avoidance of Middle East routings influencing travel choices.

Travel intent remains resilient across core markets, but consumer confidence has softened, leading to greater caution and more selective booking behaviour.

There has been a shift toward “safer” and closer-to-home travel, with stronger interest in intra-European and short-haul destinations, as consumers prioritise stability and simplicity.



Sentiment from Australia

Consumer confidence is low due to cost-of-living pressures, interest rates, inflation and fuel concerns.

Travel intent remains resilient, but behaviour is shifting – some consumers are pivoting to short-haul or alternative routings (e.g., via Singapore).

Demand for travel to Europe is mixed: there's been some slowing in near-term bookings, but continued interest further out (e.g., 2027), with more experienced travellers less concerned.



Island of Ireland Implications

Connectivity risk: the island of Ireland is indirectly exposed through disruption to Middle East hub-based connectivity for Asia-Pacific and Australia. Dublin Airport has experienced cancellations, grounded aircraft and passenger displacement.

Inbound tourism considerations: long-haul markets reliant on single-stop Middle East connections face disruption. Conversely, the island of Ireland may benefit from re-directed European demand, as travellers substitute away from higher-risk regions.

Economic Conditions

The conflict in the Middle East has created an interconnected global economic crisis, affecting households, businesses and governments on every continent. The war has triggered:

- the biggest oil supply shock in modern history;
- a slowdown in global trade growth and greater financial and geopolitical uncertainty;
- a global inflation surge, especially energy and shipping; and
- disruption to food, fertiliser, semiconductor and manufacturing supply chains.

Below is a summary of the economic outlook in our key source markets.



Source: Oxford Economics
25th March 2026

Key Source Markets

Great Britain



Oxford Economics has cut its forecast for UK GDP growth in 2026 by half a percentage point to +0.4%, due to the conflict in the Middle East. Higher oil and gas prices will push up inflation, squeezing consumer spending power. Oxford Economics expects that uncertainty about the impact on inflation expectations will prompt the Bank of England to keep monetary policy broadly unchanged until 2027.

Economic Outlook 2026 Forecast

% change 2026 vs. 2025



GDP
+0.4%



Consumer Prices
+3.6%

Exchange rate

Mar 2025 £1 : €1.20

Mar 2026 £1 : €1.15

US



Oxford Economics has left its forecast for US real GDP growth in 2026 unchanged at +2.8%. Higher energy prices resulting from the conflict will push up inflation and weigh on real disposable incomes. However, Oxford Economics expects households will continue spending, helped by an offsetting boost to incomes from larger tax refunds.

Economic Outlook 2026 Forecast

% change 2026 vs. 2025



GDP
+2.8%



Consumer Prices
+2.6%

Exchange rate

Mar 2025 \$1 : €0.92

Mar 2026 \$1 : €0.86

Mar 2025 \$1 : £0.77

Mar 2026 \$1 : £0.74

France



Oxford Economics expects the recent increase in oil prices to affect the real economy, mainly through private consumption, which will be harmed by lower household real incomes. Oxford forecasts inflation to average 1.6% this year, a marked half a percentage point upward revision from previous forecasts, stemming mostly from energy inflation. Tighter margins and higher uncertainty will also negatively impact businesses.

Economic Outlook 2026 Forecast

% change 2026 vs. 2025



GDP
+0.9%



Consumer Prices
+1.6%

Exchange rate

Mar 2025 €1 : £0.83

Mar 2026 €1 : £0.87

Germany



Recent data signals a soft start to the year. Although Oxford Economics anticipates growth in H2, downside risks have increased. Rising energy prices and continued uncertainty around the Middle East conflict threaten Germany's already fragile growth prospects, particularly if energy prices remain elevated for longer. Oxford forecasts GDP growth of just +0.6% in 2026.

Economic Outlook 2026 Forecast

% change 2026 vs. 2025



GDP
+0.6%



Consumer Prices
+2.2%

Exchange rate

Mar 2025 €1 : £0.83

Mar 2026 €1 : £0.87

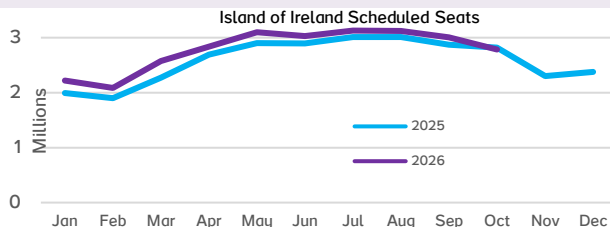
Island of Ireland Access and Accommodation Situation



Air Access Seat Capacity – Summer Aviation Season 2026*



Island of Ireland summer* seats
20.6m
+4%



*The summer aviation season runs from the end of March 2026 to the end of October 2026. The full implications of the conflict in the Middle East are yet to be determined.

Source: OAG March 2026

Scheduled air seat capacity to the island of Ireland for the summer 2026 aviation season* is currently +4% on the same period last year. Capacity to Ireland is filed at +3.5%, while Northern Ireland is scheduled at +6%. Schedules remain subject to change.

Market area air seat capacity

(000's) and % change summer aviation season 2026 vs 2025

FRANCE 1m -3%

SPAIN 3.1m +2%

ITALY 926k +6%



Mainland Europe
9.7m Flat

GERMANY 763k -1%

NORDICS 395k +14%

BENE 749k -5%



NA 2.3m +9%

US 2m +9%

CANADA 306k +9%



GB 7.7m +6%



OA 907k +9%

Source: OAG March 2026

Airport overseas seat capacity

(000's) and % change summer aviation season 2026 vs 2025

CFN 5k +17%

IWA 415k +7%

SNN 1m +13%

KIR 150k +11%



LDY 101k +20%

BFS 2.6m +2%

BHD 961k +16%

DUB 14.1m +3%

ORK 1.3m -4%

LDY = City of Derry, BFS = Belfast Int., BHD = Belfast City, DUB = Dublin, ORK = Cork, KIR = Kerry, SNN = Shannon, IWA = Ireland West, CFN = Donegal

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

In total, almost 800,000 additional seats are currently scheduled to the island of Ireland compared with last summer. Dublin Airport accounts for 60% of this increase. All airports are currently filed ahead of last summer except Cork, which is down -4%. Growth is led by key source markets, with increases from Great Britain (+6%), the United States (+9%) and Canada (+9%). Capacity from France (-3%) and Germany (-1%) is currently scheduled slightly below summer 2025 levels. Schedules remain subject to change.

Ferry Performance – January to February 2026

GB – island of Ireland ferry

% change 2026 vs. 2025 (both ways)

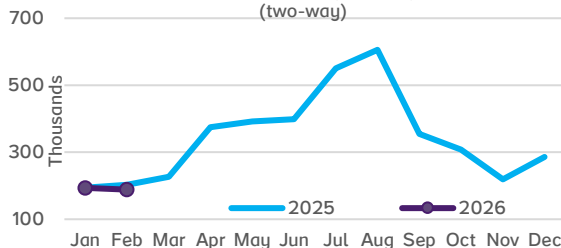
Passengers -4%

Sailings +1%

Cars +0% (flat)

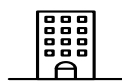
Source: Ferrystat

GB – island of Ireland ferry passenger traffic (two-way)



Ferry passenger numbers on GB routes to and from the island of Ireland for the first two months of 2026 are slightly behind (-4%) the same period in 2025. Note: performance data from France and Spain is not currently available.

Accommodation Performance – January to February 2026



% change 2026 vs 2025

Hotels (STR)

OCC +3% ADR +0% (Flat)



Short-term rental (AirDNA)

OCC -4% ADR +2%

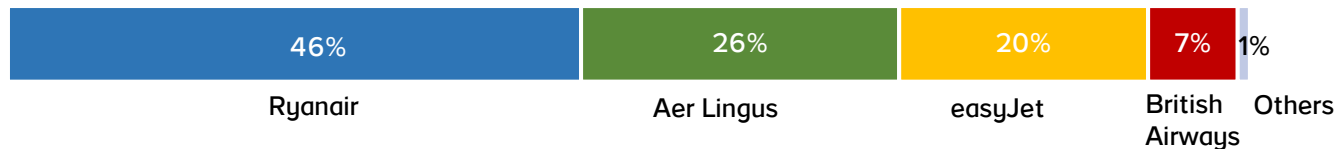
OCC = Occupancy ADR = Average Daily Rate
Data includes residents from both overseas and the island of Ireland.

According to STR, average hotel occupancy levels on the island of Ireland for the first two months of 2026 were +3% ahead of the same period in 2025. AirDNA reports that short-term rental occupancy was just below (-4%) January – February 2025.

Access update

GB to island of Ireland summer 2026 aviation season forecast seat capacity

Summer 2026 total seats: 7.7 million



News

- Aer Lingus Regional (operated by Emerald Airlines) will launch a twice-weekly service from Inverness to Dublin from 21 May.

Market activity update

Inspiring Visitors

- 'Ireland Goes Beyond' campaign:** the campaign is live from February until May on linear TV, VOD (video on demand), Meta and YouTube; it delivered an estimated 90 million quality opportunities to see in Q1 alone.
- Publicity:** over 100 pieces of positive coverage for the island of Ireland were generated in January and February. Highlights include recognition for County Antrim in *Condé Nast Traveler's* 'Best Places to Go in the UK 2026'. Press visits generated coverage in titles including *Metro*, *The Guardian* and *The Telegraph*.
- Broadcast highlights:** *Tour de Fred Ireland: Part Deux*, a TV series co-produced by Tourism Ireland, aired on ITV/ITVX in January. The second season of *Dermot's Taste of Ireland*, fronted by Dermot O'Leary, is in planning, with a media event set to take place in April. Broadcasts on ITV's *This Morning*, hosted by Donal Skehan live from Cork, Limerick and Killarney ahead of St Patrick's Day, featured 12 live segments across three days, creating 12 million opportunities to see.
- St Patrick's Day highlights:** our extensive consumer, trade, publicity and diaspora programme around St Patrick's Day included a media event at the Guinness Open Gate Brewery in London, 'Greenings', content creator activity to support regional St Patrick festivals on the island of Ireland, as well as paid amplification of Tourism Ireland's St Patrick's Day video on YouTube and digital platforms.



Strengthening Partnerships

- Co-operative marketing and partnerships:** Q1 activity included campaigns with British Airways promoting Northern Ireland city breaks, with easyJet highlighting flights to Belfast and Derry-Londonderry and with Ryanair promoting regional access. Tourism Ireland's year-long TripAdvisor partnership in Great Britain has also kicked off.
- Celtic Connections:** 28 island of Ireland industry partners met 22 GB tour operators for a one-day B2B workshop, with over 600 commercial meetings taking place to support future programme development.
- Coach Tourism Association (CTA) Conference:** 170+ delegates from the UK's important coach tourism sector took part in familiarisation visits in Northern Ireland and Donegal and in a one-day workshop in Derry-Londonderry, where over 1,200 commercial meetings took place to facilitate future growth and programming to the island of Ireland.
- The British Tourism & Travel Show:** Tourism Ireland was joined by Holiday Ireland Tours, White's Tours, Kildare Village and Laois Chamber Alliance at the leading trade event for group travel organisers in Birmingham.

Access update

North America to the island of Ireland summer 2026 aviation season forecast seat capacity

Summer 2026 total seats: 2.3 million



News

Aer Lingus

United

Delta

American

Air Canada

Others

United States

- Aer Lingus will launch a new Raleigh-Durham to Dublin service on 13 April, operating five times a week; and from Pittsburgh to Dublin on 25 May, operating four times a week.

Market activity update – United States

Inspiring Visitors

- 'Ireland Goes Beyond' campaign:** the campaign went live on 5th January, building on the December kickstart activity that delivered 148 million quality opportunities to see (reach). In Q1, the campaign generated an estimated 130 million quality opportunities to see through 'always on' Meta and YouTube activity and a six-week burst on linear and connected TV.
- Consumer partnership programme:** a tactical campaign went live on 19th January, a month earlier than in 2025, putting offers in front of consumers via deal-driven sites such as TravelSpike, Dunhill Travel and Shermans. The year-round programme will deliver 780,000 third-party referrals to 19 tour operator and attraction partners.
- Publicity highlights:** broadcaster Michael Patrick Shiels visited Ireland to record segments for *Michigan's Big Show*, which aired during St Patrick's Week to a key Midwest audience. The producer of the broadcast of the New York St Patrick's Day parade on WNBC also visited Ireland, filming vignettes on Irish cuisine, America 250 and new regional St Patrick's hubs, which aired to eight million homes on 17th March.
- Golf:** Tourism Ireland hosted a 'Golf in Ireland' press reception and media panel at the PGA Merchandise Show in Orlando, which was attended by 100+ top-tier golf journalists.



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Strengthening Partnerships

- US Marketing Plans Launch:** Tourism Ireland welcomed Minister Peter Burke to New York in February for the launch of the 2026 US Marketing Plans. The event included a plenary presentation and industry panel discussion and was attended by 120+ key trade and media partners from the tri-state area. A senior industry leaders roundtable with Minister Burke also took place earlier that day.
- Industry leaders breakfast roundtable:** Minister Caoimhe Archibald joined Tourism Ireland in Los Angeles for a business breakfast event on 12th March, meeting with 20 key US travel trade and media partners programming Northern Ireland.
- USTOA Annual Conference & Marketplace:** Tourism Ireland strengthened partnerships with leading US tour operators at the Maryland event, which was attended by 120+ operators. Tourism Ireland and three island of Ireland tourism SMEs held over 45 meetings with key tour operators to discuss growth opportunities and co-operative marketing plans for 2026.
- Affinity group travel:** Tourism Ireland, St Patrick's Festival and Celtic Horizon Tours attended a clinic in Chicago, engaging with university band organisers and choral group directors planning future island of Ireland programmes for New Year's Eve, St Patrick's Day and other events. Tourism Ireland held 15 meetings with tour operators and engaged with several band directors.
- PGA Merchandise Show, Orlando:** 27 golf and tourism SMEs showcased our world-class golf at the annual event, which was attended by over 30,000 golf professionals and industry representatives. The delegation highlighted our golf, including the legacy of The Open 2025 and the upcoming 2027 Ryder Cup at Adare Manor; they met with leading US golf professionals, tour operators and golf journalists.
- Best of Ireland West Coast sales mission:** Tourism Ireland, together with 14 tourism SMEs, led a four-city sales mission at the end of February, which visited Houston, Los Angeles, Portland and Seattle; meetings with 200+ travel advisors and media took place during the week.

Market activity update

Canada

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** the new campaign went live in Q1 in Canada, delivering over 32 million quality opportunities to see (reach) on YouTube, Meta and Connected TV (Prime, Rodgers, Sportsnet and Disney+). The campaign ran until 22nd February.
- **Always-on digital activity:** paid content seeding (PCS), search and social media delivered over 2.4 million impressions and 78,000 clicks to Ireland.com in January, with content focused on living culture, built heritage and Northern Ireland scenery and attractions.
- **Media visits:** Journalists from Canada's *100 Best*, *SHARP*, *Le Devoir* and *Celtic Life International* will visit to research stories about our culture, food and screen tourism; this will include one planned cover story and a 13-page culinary feature. The visits are expected to deliver over 2 million opportunities to see.
- **St Patrick's Day:** national TV coverage included tier-one morning shows in Toronto and Vancouver, as well as Canada's daytime talk show *The Social*. The coverage highlighted the island's culture, celebrations, cuisine and heritage and was supported by an article on St Patrick's Way in *Horizons* magazine. This activity delivered 2.7 million quality opportunities to see.



CELEBRATING ST. PATRICK IN IRELAND

Strengthening Partnerships

- **Golf luncheon with Minister O'Donovan:** Tourism Ireland hosted a luncheon for travel trade and media partners, highlighting the fact that the 2027 Ryder Cup will take place at Adare Manor and reinforcing the island of Ireland's position as a leading golf destination.
- **Toronto Golf & Travel Show:** we partnered with Links of Ireland at the Toronto Golf & Travel Show (22,000+ attendees), showcasing the island of Ireland as a premier golf destination, to inspire Canadian golfers planning their next holiday.
- **SITE Exchange:** Tourism Ireland took part in the SITE Canada Exchange, holding 1:1 meetings with 27 Canadian meeting planners, strengthening Tourism Ireland's Canadian planner database and generated qualified leads for future MICE business to the island of Ireland.



Australia

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** the first phase of the new campaign went live in mid-February and will run until April on Meta, YouTube and Amazon Prime, targeting our 'Enrichment Explorer' audience and inspiring travel to the island of Ireland.
- **Press coverage:** recent press trips generated strong results, including a *48 Hours in Cork* feature in *Escape*, which reached a combined 2.2 million across six outlets; and a cover story in *Explore* on Ireland's Hidden Heartlands which reached over 460,000 people.
- **Golf Digest partnership:** our partnership with *Golf Digest* aims to promote the island of Ireland as a premier golf destination for Australian golfers in the lead-up to the 2027 Ryder Cup. Activity includes digital and print articles, advertorials, paid activity on social channels and email marketing to the *Golf Digest* database, all driving traffic to Ireland.com.
- **St Patrick's Day:** Tourism Ireland sponsored the St Patrick's Day festival in Sydney, which was attended by thousands. Travel information was provided to attendees by Tourism Ireland; and our 'Ireland Goes Beyond' campaign video was played on giant screens throughout the day. Activity also included social media coverage from the festival, as well as branding around the festival grounds. Flinders Street Station in Melbourne and the Sky Tower in Auckland took part in Global Greening.



Strengthening Partnerships:

- **Entire Travel Group:** Tourism Ireland was a destination partner at Entire Travel Group events in Melbourne, Sydney and Brisbane in mid-February, which were each attended by 250+ travel agents.
- **International Media Marketplace (IMM):** Tourism Ireland participated in TravMedia's IMM in February, conducting 20 one-to-one meetings with journalists to promote the island of Ireland.



Southern Europe – France, Italy and Spain



Access update – Southern Europe

France, Italy and Spain to the island of Ireland summer 2026 aviation season
forecast seat capacity (excl. sun/ski/pilgrim)

Summer 2026 seats: 2.6 million

40%

35%

25%

News

France

- **France:** new Aer Lingus services from Nice to Cork and Montpellier to Dublin will launch in May. A new Tours to Dublin service will begin in June.
- **Italy:** a new Shannon to Rome Ciampino flight began at the end of March. Ryanair's Bergamo to Belfast service also returned at the end of March.
- **Spain:** Aer Lingus will launch new services from Asturias to Dublin, in May; and from Santiago de Compostela to Cork, in June. Capacity will also increase on the key Madrid to Dublin route from late March through to October.

Italy

Spain

Market activity update

France

Inspiring Visitors

- **'Ireland Goes Beyond' campaign:** a spring wave launched on 5th February around the France v Ireland Six Nations match and is running on TV, Connected TV, Netflix, YouTube and Meta until the end of March, to drive awareness and consideration; it will deliver an estimated 115 million quality opportunities to see.
- **Publicity:** a 10-page feature in *Grands Reportages*, a leading monthly travel magazine, highlighted the ease of travelling to Belfast and showcased a five-day itinerary in Donegal and Northern Ireland. The coverage reached an audience of 400,000.

Strengthening Partnerships:

- **Co-op activity:** campaigns are live from March with Brittany Ferries, Ryanair, Voyage Privé and Perfectstay. Partnerships with Carrefour Voyages, Bord Bia and the Havas Premium network were launched during Ireland Week, around St Patrick's Day, to convert interest to sales.
- **St Patrick's Day trade and media event:** More than 80 French travel trade and media guests joined us for one-to-one meetings with 22 SME tourism partners from the island of Ireland. Tánaiste Simon Harris gave the keynote speech.
- **Lunch and Learn sales mission:** 10 SME tourism partners from the island of Ireland met with more than 60 French travel trade in Lyon, Rennes and Nantes.

Italy

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** a spring campaign ran from mid-February to the end of March on digital, social, online video and connected TV (YouTube, Amazon Prime and Netflix) channels. The campaign delivered more than 39 million quality opportunities to see (reach).
- **Ireland Week:** a weeklong celebration of St Patrick's Day in mid-March showcased Ireland's culture, landscape, heritage and experiences, with more than 15 tourism partners from Ireland participating; this was supported by a digital and metro campaign.

Strengthening Partnerships:

- **Podcasts:** a partnership with LastMinute.com and Dove Viaggi, featuring five new podcasts promoting Ireland's experience brands and regions, kicked off in March. The series will be supported by a digital and social campaign.

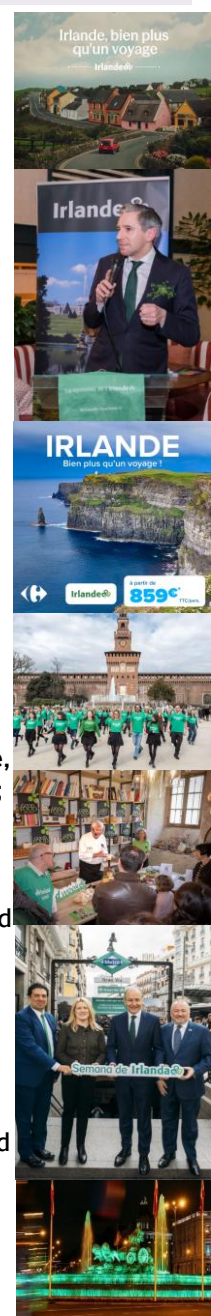
Spain

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** a spring digital campaign is running on Meta, YouTube, Quantcast and Connected TV (including Netflix), to generate awareness and consideration for the island of Ireland as a year-round premium destination; it will deliver 36 million quality opportunities to see.
- **Semana de Irlanda (Ireland Week)** was launched by Taoiseach Micheál Martin at Gran Vía (renamed Green Vía for St Patrick's Day!) and ran from 10th to 17th March, leveraging St Patrick's Day with immersive events, major publicity (200 features) and digital and social activity; this was supported by partnerships with Metro de Madrid, Viajes El Corte Inglés and Madrid City Council. Thirteen (13) SME tourism partners from Ireland participated and engaged in around 200 B2B meetings.

Strengthening Partnerships:

- **Co-op activity:** a campaign with Brittany Ferries is running from March onwards, promoting its Bilbao to Rosslare service; also, a major activation with leading travel agency retailer B Travel is under way to drive bookings during H1, with a focus on Dublin and Belfast.



Access update

Germany, Austria and Switzerland to the island of Ireland summer 2026 aviation season forecast seat capacity

Summer 2026 total seats: 1.1 million



News

Germany:

- Lufthansa will increase frequency and capacity on its service to Cork this summer, rising from four to six weekly flights and operating with a larger aircraft.
- Discover Airlines, a Lufthansa Group subsidiary, will launch a new service from Frankfurt to Shannon in April.

Market activity update

Germany:

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** the campaign went live in January and is running on Connected TV, online video (YouTube), Meta and Pinterest. A 30-second ad is currently running in cinemas, supported by media partnerships (with Merian, GEO, Stern and Brigitte). The campaign will deliver over 200 million quality opportunities to see.
- **St Patrick's Day:** activity included a 60-second video on YouTube which generated 4.5 million quality opportunities to see, partnership activities at several events, as well as coverage on ZDF TV's morning show. Content creators and journalists visited the island of Ireland.
- **Holiday Check campaign:** activity is live, driving potential holidaymakers for Ireland to two content pieces featuring itineraries and premium experiences on the island of Ireland, via social and other channels. During St Patrick's Week, the main banner on the homepage of Holiday Check was Ireland themed, generating additional awareness for the island of Ireland as a holiday destination.
- **Co-op campaign:** a campaign with Lastminute.com and weg.de launched in February across all DACH markets, to promote bookings to the island of Ireland.
- **Partnerships:** includes activity with walking operator Wikinger Reisen and sports retailer Sportscheck, to promote the island of Ireland as a walking destination, with a mix of digital, in-store and newsletter activity.

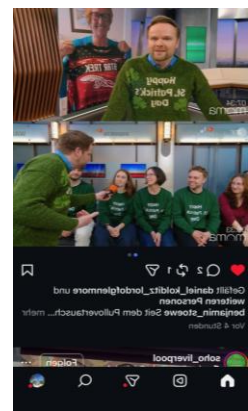
Strengthening Partnerships:

- **ITB Berlin:** Tourism Ireland was joined by 18 island of Ireland industry partners at ITB Berlin this year, where they met with 200 trade and media partners from the DACH countries.
- **Ireland Floating Roadshow:** a floating roadshow on the River Rhine visited nine cities; there was engagement with over 400 German travel agents at breakfast and evening events.
- A Frankfurt Airport activation with Discover Airlines will also promote the island of Ireland and the new Discover Airlines flight to Shannon.

Austria and Switzerland

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** the campaign in Switzerland went live on 9th January on Connected TV, online video and Meta and will run until the end of Q2. The campaign has delivered almost 5 million quality opportunities to see (reach) to date.
- **Trade events:** Tourism Ireland held workshops with tour operators in Salzburg (25 participants) and Graz (35 participants). Partners included tour operators Kneissl Touristik, Ruefa, DERTOUR and GTA Touristik, as well as Aer Lingus.
- **Partnerships:** a co-op campaign with Edelweiss began in Q1 to increase awareness and bookings.



Northern Europe – Netherlands, Belgium and the Nordics

Access update

Northern Europe to the island of Ireland summer 2026 aviation season forecast seat capacity

Summer 2026 total seats: 1.1 million



News

Netherlands, Belgium and the Nordics:

- A new Aer Lingus flight from Oslo to Dublin will launch in May.

Market activity update

The Netherlands and Belgium

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** activity is live across Meta, YouTube and DPG (local media network in the Netherlands and Belgium) and is projected to deliver 14.4 million quality opportunities to see.

Strengthening Partnerships:

- **Travel Counsellors partner day:** Tourism Ireland, Galway City Museum and partners promoted Galway (which is 'twinning' with Belgium and the Netherlands) to 120 independent travel agents in Utrecht.
- **Travel trade days:** Tourism Ireland had an Ireland stand on the B2B days of Vakantiebeurs in Utrecht, with four Irish tourism SMEs (Abbey, Gleneagle Group, Sandymount Hotel and Real Adventures Connemara) meeting key Dutch travel trade partners.

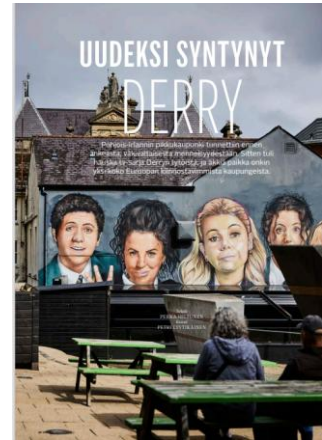
Nordics

Inspiring Visitors:

- **'Ireland Goes Beyond' campaign:** the campaign is live on Meta in Denmark and Sweden during a key booking period, with almost 6 million quality opportunities to see created in February alone.
- **Publicity:** recent coverage included an article on the locations featured in *Derry Girls* in the travel magazine *Mondo*, which reached 27,000 Finnish readers. Our St Patrick's Day 'Greening' of the Jelling Stones captured media attention in Denmark on 17th March; this included coverage in *Berlingske* (daily newspaper).

Strengthening Partnerships:

- **Trade partnerships:** Tourism Ireland met 33 trade partners in Oslo, Helsinki and Copenhagen at key travel trade events in January; there was further engagement at Danish Travel Connect in February.
- **Nordics Trade Workshop, Stockholm:** our workshop in February brought together 26 island of Ireland tourism SMEs and 30 Nordic travel trade during a one-day B2B workshop, at which 780 commercial meetings were held.
- **Co-op marketing:** a campaign with Rolf Buss, Sweden's largest group tour operator, is live to promote its 2026 island of Ireland tours.



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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