

SOAR

(Situation & Outlook Analysis Report) November 2023



The International Monetary Fund (IMF) has left its forecast for global real GDP growth in 2023 unchanged at +3% in its latest [World Economic Outlook](#). However, it has cut its 2024 forecast by 0.1 percentage point to +2.9% since July. According to the IMF, global recovery remains slow, with growing regional divergences and prospects for medium-term growth being mediocre.

Economic activity remains below pre-pandemic levels and the IMF remains concerned about risks related to volatile commodity prices, geopolitical fragmentation and a resurgence in inflation.

A strong restoration of direct air access capacity to the island of Ireland is scheduled for this December. Based on OAG filings, scheduled air seat capacity to the island of Ireland for December 2023 will be 109% of 2019 levels, with almost 2.2 million seats filed for the month.

Seat capacity from each of our four market areas is positive. GB (103%), Mainland Europe (116%), North America (112%) and Other Areas (129%) are all filed above December 2019 levels.

STR reports that hotel occupancy in Northern Ireland for January-September 2023 was 76%, up +4% on January-September 2019. In Ireland, occupancy was 81%, up +1% on January-September 2019.

The average daily rate (ADR) for a room in Northern Ireland for January-September 2023 increased by +36% to £108, when compared to the same period in 2019. In Ireland, the average daily rate for January-September 2023 was €174, up +34% on the same period in 2019.

Tourism Ireland's extensive, highly targeted programme of promotions around the world continues. Our 'Ireland Home of Halloween' campaign – celebrating the island of Ireland as the birthplace of the world's spookiest festival around 2,000 years ago – was rolled out at the end of October. We've also been highlighting other reasons to visit the island of Ireland during the off-season months – including festivals and events like Wexford Festival Opera and NYF Dublin (New Year's Festival). Kickstart campaigns will be rolled out in our key overseas markets towards the end of 2023, to position us well for 2024.

Tourism demand continues to show remarkable resilience and sustained recovery, even in the face of economic and geopolitical challenges. The United Nations World Tourism Organization (UNWTO) has been tracking the sector's recovery over the course of 2023. Its latest [World Tourism Barometer](#) reports that, by the end of July, international tourist arrivals reached 84% of pre-pandemic levels. The challenging economic environment continues to be a critical factor in the effective recovery of international tourism, according to the UNWTO. Persistent inflation and rising oil prices have translated into higher transport and accommodations costs. This could weigh on spending patterns, with tourists increasingly seeking value for money.



Economic Conditions



Great Britain

The growth outlook remains weak, as interest rates near their peak. Softening activity and evidence of loosening labour market conditions have weakened the case for further interest rate rises. Oxford Economics believes activity will struggle to gain momentum, given sticky inflation and the lagged impact of tighter monetary policy. Inflation will be slow to fall and thus household spending power remains under pressure.

Exchange rate

Oct '22 £1 : €1.14 Oct '23 £1 : €1.16

US

Oxford Economics forecasts the growth momentum to slow sharply at the turn of the year. The US economy faces a number of risks including worker strikes, a government shutdown and volatile oil prices. Beyond that, Oxford Economics believes that tight monetary and fiscal policies, as well as the depletion of excess savings, will weigh on the economy. Oxford Economics forecasts GDP growth of +2% in 2023 and just +0.2% in 2024.

Exchange rate

Oct '22 \$1 : €1.03 Oct '23 \$1 : €0.94
 Oct '22 \$1 : £0.90 Oct '23 \$1 : £0.82

France

Reflecting the better-than-expected resilience of the economy, Oxford Economics has raised its growth forecast for France to +0.8% and marginally increased its 2024 projection to +0.6%. The services sector is growing; however, stubbornly high inflation clouds the outlook. Oxford Economics projects 5% inflation for 2023; however, it sees inflation easing to average 2% next year.

Exchange rate

Oct '22 €1 : £0.88 Oct '23 €1 : £0.86

Germany

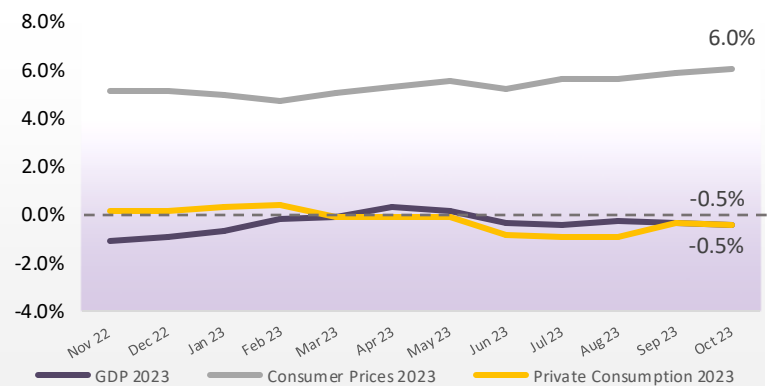
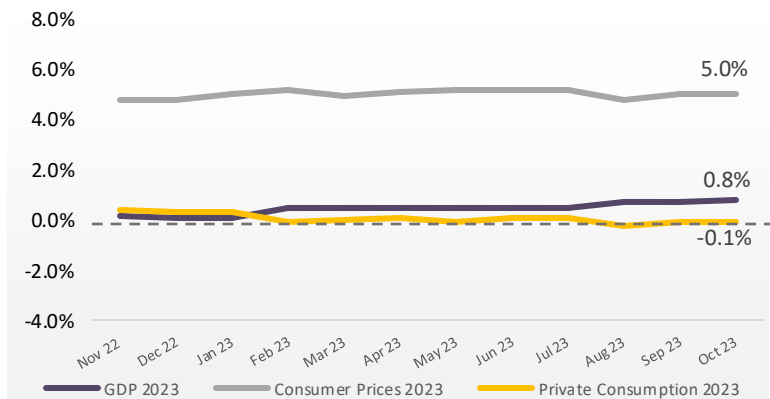
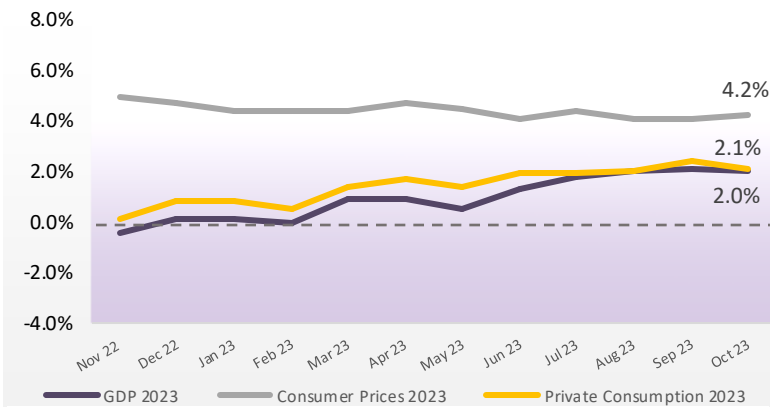
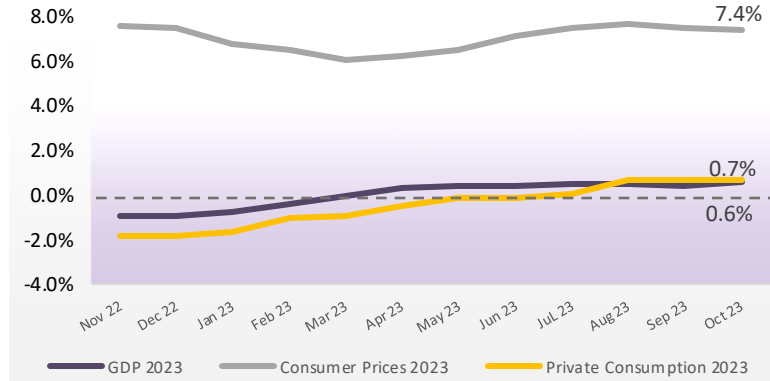
The outlook for the economy remains gloomy. Oxford Economics believes that GDP contracted in Q3, supported by recent poorly-performing data releases. The weakness is broad-based but concentrated in industry. A consumer recovery is an offset, but it seems to have less momentum than expected. A softening labour market and higher oil prices will impact real incomes and may dampen consumer confidence.

Exchange rate

Oct '22 €1 : £0.88 Oct '23 €1 : £0.86

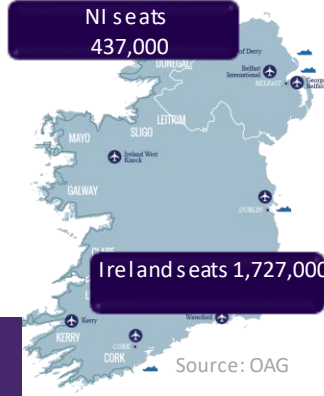
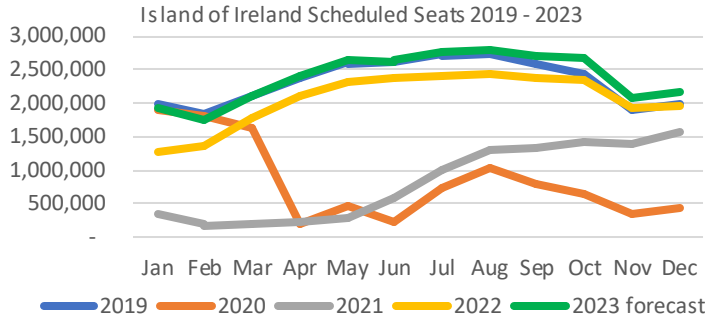
2023 Economic Outlook by Oxford Economics trended by month

Source: Oxford Economics



Island of Ireland Access Situation

Dec 2023 Forecast Seat Capacity

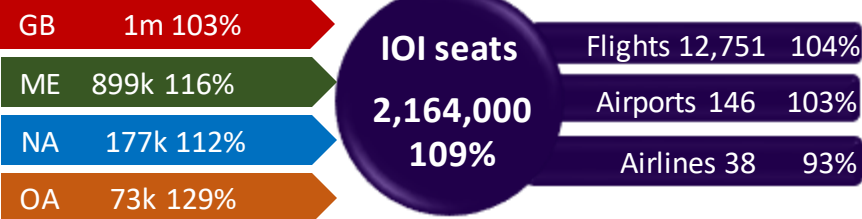


There is a very positive outlook for direct air access capacity to the island of Ireland for December 2023, with almost 2.2 million seats planned. Based on OAG filings, air seat capacity to Ireland is planned at 108% of December 2019 levels, with Northern Ireland scheduled at 116%.

Seat capacity to the island of Ireland for December 2023 is scheduled at 109% of the level it was in December 2019.

Air Access Dec 2023 forecast – % share of 2019

IOI Seat Capacity



Seat capacity from each of our four market areas is positive. GB (103%), Mainland Europe (116%), North America (112%) and Other Areas (129%) are all filed above December 2019 levels. Airlines are scheduled to operate close to 13,000 flights in December 2023.

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

Airports Forecast – Dec 2023

Cork and Dublin airports are scheduled to return to 123% and 106% of their respective December 2019 seat capacities. Belfast City Airport and Belfast International Airport are scheduled at 119% and 117% respectively. Shannon (134%) and Knock (102%) are scheduled above December 2019 levels, while City of Derry (58%) and Kerry (79%) are filed below.

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

Airports	Dec 2019 Seats	Dec 2023 Seats	2023 % share of 2019
Belfast Intl.	250,064	293,666	117%
Belfast City	114,176	135,907	119%
City of Derry	11,939	6,937	58%
Dublin	1,391,955	1,472,135	106%
Cork	103,022	127,048	123%
Shannon	61,343	81,921	134%
Knock	35,161	35,867	102%
Kerry	13,230	10,398	79%
Donegal	528	0	0%
Total	1,981,418	2,163,879	109%

Ferry Performance – Jan-Sep 2023 vs Jan-Sep 2019

The latest performance data is for the first nine months of 2023 and shows ferry passengers to and from the island of Ireland at 95% of January-September 2019 levels. Northern Ireland passenger traffic was 102% and Ireland was 89%. Note: performance data from Spain is not available, and thus not included in these figures.

Ferry Passenger Traffic	Jan-Sep 2023 % share of Jan-Sep 2019
Northern Ireland	102%
Ireland	89%
Island of Ireland	95%

Ferry (both ways)	Jan - Sep 2019	Jan - Sep 2023	2023 % share of 2019
GB – island of Ireland			
Sailings	15,894	14,582	92%
Passengers	3,707,863	3,392,807	92%
Cars	931,787	990,576	106%
France – Ireland			
Sailings	576	977	170%
Passengers	299,332	398,736	133%
Cars	89,368	119,815	134%

Sources: OAG and Ferrystat

CSO Inbound Tourism

The Central Statistics Office has released Inbound Tourism August 2023. This replaces 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. The CSO has advised that the Inbound Tourism 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.

Republic of Ireland Inbound Tourism August 2023

Main market area	Visitors (000's)	Nights (000's)	Spend* € (million)
Great Britain	260	1,822	132
Mainland Europe	273	3,287	303
North America	165	1,417	237
Other Areas	39	812	60
Total	738	7,338	733

*Spend excludes fares

The third release of the new series provides data for August 2023.

The CSO reports 738,000 overseas tourists took overnight trips to Ireland during August 2023.

These overseas tourists stayed 7.3 million nights in Ireland, spending €733 million (excluding fares).

Source: CSO

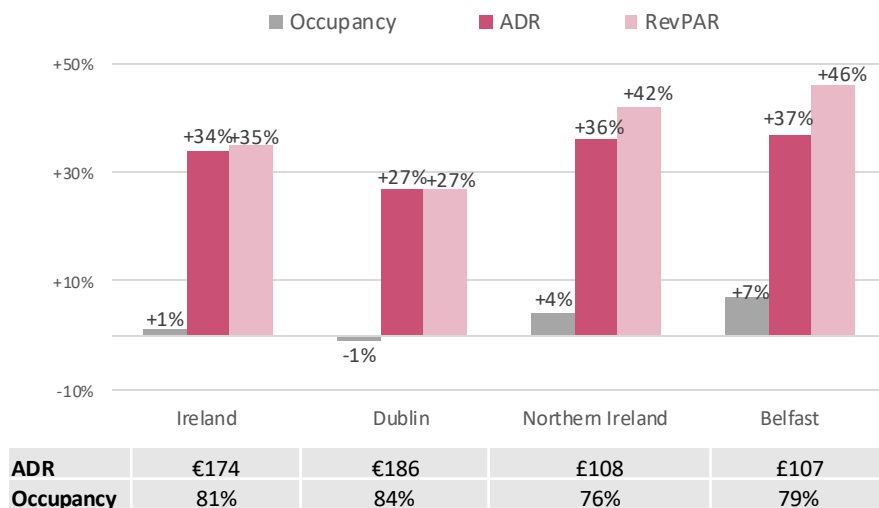
Hotel accommodation

Latest performance data available from STR reports that hotel occupancy for January-September 2023 in Northern Ireland was 76%, up +4% on January-September 2019. In Ireland, occupancy was 81%, up +1% on January-September 2019.

The average daily rate (ADR) for a room in Northern Ireland in January-September 2023 increased by +36% to £108 and in Belfast by +37% to £107, when compared to the same period in 2019.

In Ireland, the average daily rate in January-September 2023 was €174, up +34% when compared to the same period in 2019. The average daily rate in Dublin for the first nine months of 2023 was €186, up +27% on January-September 2019.

Island of Ireland Hotel Performance January-September 2023 / January-September 2019 % change



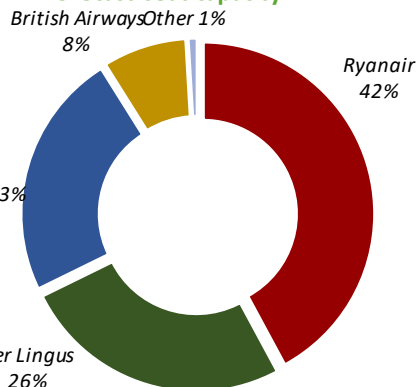
Note: Data includes residents from the Republic of Ireland and Northern Ireland.

ADR = Average Daily Rate

Source: STR 2023

Access update

December 2023 GB to IOI forecast seat capacity



December 2023 total seats: 1 million

News

- Ryanair has announced new services this winter from London (Gatwick, Luton and Stansted) to Belfast. It has also confirmed a new route this winter from Liverpool to Shannon.
- Overall, scheduled air seat capacity from Great Britain to the island of Ireland for December 2023, when compared to December 2019, is filed at 103%.
- Loganair has released its schedule for services between Glasgow and Donegal in 2024. Flights will commence earlier in the season (from 5 April) and will increase from three per week in 2023 to four per week for 2024.

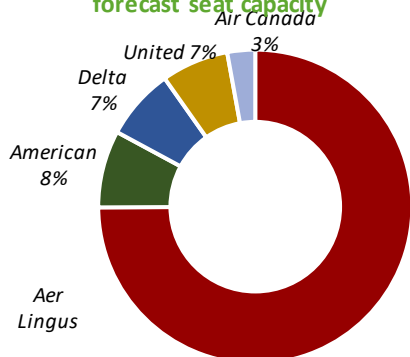
Market activity update

- **Awards:** Ireland won Best International Destination at the Group Leisure & Travel Awards 2023.
- **Ireland 'Home of Halloween':** a campaign driving awareness of the island of Ireland as the 'Home of Halloween' using video content ran on key digital channels. Two journalists and an influencer attended Derry Halloween (Culture Trip, Love Exploring and Kelly Prince Wright). Portia Jones (freelance and podcaster) attended Púca Festival and press releases were also issued.
- **'Activities' in Ireland:** a campaign is live to drive awareness of the variety of activities available on a trip to the island of Ireland. The campaign will deliver an estimated 18 million impressions (opportunities to see) on YouTube.
- **Short breaks:** a campaign promoting winter trips to Dublin, Belfast, Cork and Galway will go live this November.
- **Co-operative marketing:** current activity includes a partnership with Ryanair promoting direct access to the Wild Atlantic Way; with Stena Line promoting car touring to the island of Ireland; and a partnership with Kayak promoting the regions and regional businesses. Partnerships are planned for later in Q4 with Aer Lingus, Travelzoo, Top Cashback, Skyscanner, Lastminute.com and Expedia.
- **GB value-add initiative:** "Stay for 3, Pay for 2" hotel partnerships are live with Travelzoo and Sojern, promoting regional/seasonal value and length of stay extension.
- **Trade co-op:** campaigns promoting shoulder season travel are live with Glenton Holidays, Dunwood Travel and Just Go! Holidays.
- **Travel Weekly and Group Leisure & Travel Magazine:** activity is live with a Wild Atlantic Way focus.
- **Golf:** seven journalists, representing titles like *Today's Golfer*, *Golf Monthly* and *Bunkered*, visited golf courses including Royal Portrush and Ballyliffin.
- **Luxury:** media partnerships with *The Sunday Times* and *Wanderlust* are live, highlighting the island of Ireland's luxury product to a premium audience.
- **Media visits:** include a group press trip to Derry~Londonderry and Donegal, with journalists from *Press Association*, *Coast*, *The Times* and *The Scottish Sun* taking part.
- **Influencer trip:** five influencers visited Ireland's Ancient East in October; their itinerary included Powerscourt House & Gardens, Beyond the Trees at Avondale and Rathdrum forest bathing.
- **Diaspora engagement:** activity includes running Fill your heart with Ireland (FYHWI) TV ads on 'Irish in the UK' – a dedicated TV channel with a big diaspora following (1.8 million reach) and a content partnership with the Liverpool Irish Festival.



Access update

December 2023 NA to IOI forecast seat capacity



December 2023 total seats 177,000

News

United States

- Delta Airlines has announced the reinstatement of its JFK to Shannon service next year, which will begin at the end of May and run until October. This is in addition to their recently announced new route from Minneapolis–Saint Paul to Dublin.
- JetBlue will begin daily flights from JFK and Boston to Dublin from March 2024.

Market activity update

- **Fill your heart with Ireland:** campaign activity continues, supported by digital “always-on” channels, a tactical partnership programme, as well as 'Ireland Home of Halloween' and Thanksgiving activity.
- **Pure Cork showcase:** Tourism Ireland hosted an event in San Francisco showcasing Cork to 40+ travel trade and media contacts. We were joined by VisitCork, Hayfield Manor, Castlemartyr Resort, The River Lee Hotel, Cronin’s Coaches, Fota Collection and Aer Lingus.
- **Irish Arts Center (IAC):** Tourism Ireland partnered with the IAC at an event featuring the unveiling of a portrait of Senator George Mitchell commemorating the anniversary of the signing of the Good Friday Agreement. The event was attended by key Northern Ireland stakeholders in New York and Tourism Ireland had a speaking opportunity to deliver our destination message.
- **Screening of Northern Ireland movie:** Tourism Ireland promoted Northern Ireland at the Chicago International Film Festival, which featured the movie *Nowhere Special*, which was filmed and set in Northern Ireland.
- **Media event:** Tourism Ireland hosted a media reception in Seattle with Aer Lingus to showcase the direct year-round flight to Dublin and all the great things to see and do in Q4/Q1, including Púca Festival, Derry Halloween, Cork Jazz Festival and TradFest.
- **Media conferences:** Tourism Ireland attended both the Outdoor Writers Association of America (OWAA) and the Travel Classics conferences, to engage and pitch new story ideas to media and to strengthen relationships made at the 2023 Travel Classics conference at Ashford Castle.
- **Publicity:** PBS TV crew filmed in Ireland last month for *Stepping Out*. The episode will be broadcast in 2024, reaching up to 100 million homes. A separate PBS crew filmed recently in Dublin and Northern Ireland for *Canvassing the World*; the show is filmed from an artist’s perspective and will be broadcast in 2024.
- **Publicity Influencer trips:** Four leading Stellar influencers, with a combined reach of almost 900,000, visited the island of Ireland to highlight Culture Night and encourage shoulder season travel.
- **Golf:** Tourism Ireland facilitated travel for key US golf media to the Irish Open; a ‘home of major championships’ message was delivered to key golf media. Tourism Ireland also partnered with San Francisco Pride to sponsor its pro-am golf tournament. The partnership included on-course branding, an information booth and a speaking opportunity to 300+ participants.
- **Luxury familiarisation trip:** Ten US luxury travel professionals –from the high-profile travel agent network Virtuoso – explored the island of Ireland last month. to get new ideas for their custom-designed client itineraries.
- **Luxury trade event:** 13 tourism partners from the island of Ireland joined Tourism Ireland at the International Luxury Travel Market (ILTM) North America for the first time. This invitation-only event for the global luxury travel industry attracted more than 470 influential travel agents and decision-makers who design unique, luxury travel itineraries for their high net-worth international clients.



Market activity update

Canada

- **Fill your heart with Ireland:** our brand campaign continues on social media, with programmatic video and display supported by a tactical partnership programme, as well as 'Ireland Home of Halloween' promotions.
- **Publicity:** national morning TV show, *Your Morning* (200,000 viewers), visited Wexford, Waterford and Kilkenny with a special feature on Dunbrody House and host Lindsay Deluce's ancestral connections to Kilkenny. Canada's leading entertainment programme *Etalk* (5 million viewership) also visited, to feature the origin of Halloween and Derry Girls.
- **Tour Radar:** a custom content campaign continues, retargeting consumers who have previously engaged with island of Ireland content. The campaign has delivered 1+ million impressions (opportunities to see) to date.
- **Trade activity:** eight industry partners participated in our Senses of Ireland sales mission in October to Calgary, Edmonton and Vancouver, connecting with 180+ top tier travel advisors and media, with an experiential evening of immersive activities and attractions across the island of Ireland.
- **Terroir Symposium:** five island of Ireland industry partners conducted workshops and panel discussions at Terroir Symposium in Calgary, Alberta, one of North America's most prestigious culinary-focused conferences – highlighting Irish food, drink and entertainment to over 400 attendees during the three-day event.
- **Púca Festival familiarisation trip:** four Canadian tour operators took part in a six-day familiarisation trip to experience Samhain and the Púca Festival, also focusing on product in and around Ireland's Ancient East. The objective of this trip was to increase off-season and regional programming to the island of Ireland and highlight the island of Ireland's unique position as the 'Home of Halloween'.
- **Trade activity:** live destination training for leading travel consortia Ensemble for 400 Canadian advisors, with recordings hosted on the Ensemble portal for six months, educating the travel trade on unique selling points, new product and top motivators for Canadian consumers to visit the island of Ireland.
- **Publicity/Influencer campaigns:** Canadian influencers Travelling Mitch and Bri Mitchell Travels (42,000 followers) visited the island of Ireland focusing on history and culture; while Davey & Sky (50,000 followers) featured Ireland as the 'Home of Halloween' and explored their ancestry connections, showcasing their journeys live across social media.

Australia

- **Fill your heart with Ireland:** Our brand campaign launched in Australia at the beginning of September and is performing very well on social media, YouTube and display.
- **Trade co-op:** campaigns with tour operators Trafalgar and Collette are live in October and November, featuring a mix of channels including radio and digital advertising.
- **Familiarisation trip:** ten Australian and New Zealand travel agents visited Ireland's Ancient East, the Wild Atlantic Way and Northern Ireland in October.
- **Trade activity – ETC Travel Europe B2B Roadshow:** Tourism Ireland is taking part in a B2B roadshow with Rail Europe and European Travel Commission's (ETC) Australia Chapter destinations in Melbourne and Sydney. The events provide an opportunity to showcase the island of Ireland to influential travel agents specialising in selling Europe.
- **Publicity:** two episodes of *Better Homes and Gardens* filmed on the island of Ireland delivered a combined audience reach of 2.6 million.
- **Media partnerships:** Tourism Ireland partnered with *International Traveller Magazine* to promote 'Journeys through Ireland' in its highest circulation print edition released for September/October/November 2023, set to reach 523,000. The custom content partnership is designed to bring to life the story of holidaymakers journeying from Australia to Ireland and travelling the scenic routes of the Wild Atlantic Way and the Causeway Coastal Route.
- **Halloween:** a campaign driving awareness of Ireland as the 'Home of Halloween' ran using video content across key digital channels.



Ireland's medieval marvel

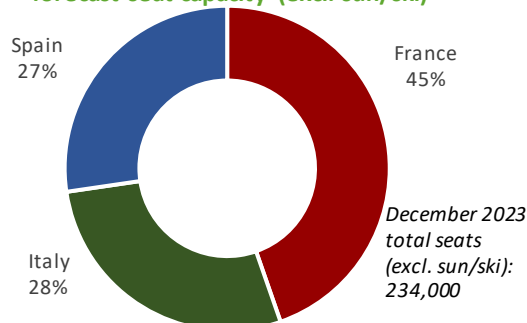


Southern Europe – France, Italy and Spain



Access update – Southern Europe

December 2023 France, Spain, Italy forecast seat capacity (excl. sun/ski)



News

France:

- Ryanair will begin a new Paris Beauvais to Cork service from the end of October 2023 to the end of March 2024.
- Aer Lingus has commenced a new service from Paris Charles de Gaulle to Shannon, operating twice a week.

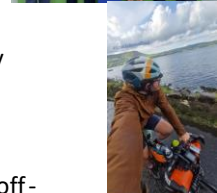
Spain:

- Ryanair will operate two new routes from Barcelona and Seville to Cork for winter 2023/2024, with two weekly flights on each route.
- Iberia Express has increased capacity on its Madrid to Dublin service, with up to nine flights per week for winter 2023/2024.
- Due to operational works at Bilbao port, Brittany Ferries will sail from Santander to Rosslare until March 2024.

Market activity update

France

- **Rugby World Cup:** extensive activity during the tournament throughout France. Activity included digital outdoor ads in Bordeaux, Toulouse, Nantes, Paris and Tours; social activation on the streets of Paris with the Gardiner Brothers; and a Tourism Ireland presence in fan zones with the Gardiner Brothers and Faye O'Rourke. Further activity included videos on social media promoting Cork and surrounds and articles in leading rugby publications. We also had a partnership with Ronan O'Gara, who is a well-known personality in France, which included him being guest speaker at an event in Paris.
- **Co-op marketing:** includes activity with Stena Line to stimulate bookings in Q4; and with Ryanair to promote its new Paris Beauvais to Cork service. A co-operative campaign will take place with Voyage Privé to drive Q4 demand.
- **Partnership activity:** includes a partnership with Lastminute.com until the end of the year, to drive demand for Dublin in Q4; and a partnership with TUI in November, to increase demand during Q4.
- **Golf:** Tourism Ireland had a presence at the French Open tournament, with two industry partners from the island of Ireland (Brittany Ferries and tour operator Parcours Voyages).
- **Business events:** an event will take in Paris showcasing our MICE offering, with 10 island of Ireland partners and 30 French MICE buyers.
- **Luxury:** Tourism Ireland and 14 island of Ireland industry partners will attend ILTM (International Luxury Travel Market).



Italy

- **Fill your heart with Ireland:** a short breaks digital campaign is live, promoting off-season travel to Dublin, Cork, Galway and Belfast. The goal is to drive traffic to Ireland.com and generate 32+ million impressions (opportunities to see).
- **Ryder Cup:** Tourism Ireland had a Golf in Ireland stand at the Ryder Cup in Rome; we also had an Irish night event in Rome, attended by 90+ key Italian and international media and trade.
- **Influencer sustainable trip:** cycling influencer Pietro Franzese recently travelled along the Wild Atlantic Way and Causeway Coastal Route, which resulted in extensive coverage across social media.

Spain

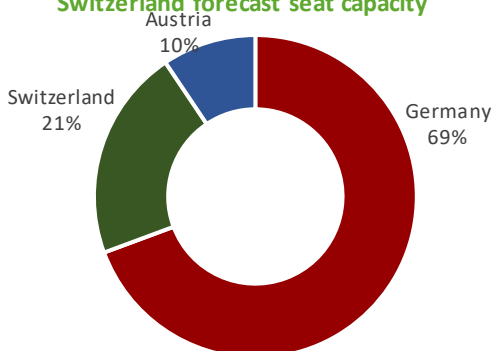
- **Fill your heart with Ireland:** a short breaks digital campaign is live, driving awareness and consideration for off-season travel, with approximately 33 million impressions across programmatic video and paid social. Campaign creative is videos for Dublin, Belfast, Cork and Galway.
- **Ireland 'Home of Halloween':** a digital campaign was live; also publicity and partnerships with the Irish Embassy and Bord Bia.
- **Trade roadshow:** a Tourism Ireland and VisitBritain roadshow visited A Coruña, Madrid, Bilbao and Barcelona. Seventeen (17) industry partners met with 300+ key travel agencies and tour operators.
- **Co-op activity:** live campaigns include with Atrápalo and Logitravel to drive short break demand; a regional sea access promotion with Brittany Ferries; and with leading retailer Viajes Nautalia to encourage longer stays, visiting the regions and Northern Ireland.

Central Europe - Germany, Austria and Switzerland



Access update

December 2023 Germany, Austria Switzerland forecast seat capacity



December 2023 total seats: 132,000

News 2023

Germany:

- Air seat capacity between Germany and the island of Ireland for this December is filed at 81% of December 2019 levels.
- Ryanair is not filed to operate routes from Leipzig and Nürnberg to Dublin this winter; nor is the Cologne to Knock service filed.
- Eurowings will not operate its Düsseldorf to Dublin service in the winter.

Market activity update

Germany

- **Fill your heart with Ireland:** phase 3 of our Fill your heart with Ireland (FYHWI) campaign has just ended. The campaign included video and banner display ads, audio ads on Spotify, as well as ads on social media.
- **Activities campaign:** As well as our FYHWI campaign, we are running an activities campaign on Connected TV. To date, our activities video has had over 3.1 million impressions (opportunities to see) and over 2.9 million completed views.
- **TSS Conference:** Tourism Ireland had a stand at the AGM of TSS, Germany's largest travel agency association. There were 600 delegates in attendance, as well as seven tour operators who offer island of Ireland programmes.
- **German Travel Association:** The association held its annual 'Destination Forum' in Ireland in October, with 60 top German travel agents visiting. Highlights included familiarisation trips, a networking event with island of Ireland industry partners and a workshop at Druid's Glen Hotel.
- **Co-op marketing:** a campaign with LastMinute is live and includes digital display banners, social media and newsletters.
- **Familiarisation trip:** four leading German travel agents and two key German luxury journalists visited Dublin, Wicklow and Kilkenny, which resulted in articles on the leading two German luxury online magazine platforms.
- **Influencer and media visits:** activity over the last two months has included seven influencers and seven journalists visiting the island of Ireland.
- **Kerrygold and ADAC Reisen:** campaign started in September; highlights include 60 million butter packs featuring an Ireland competition and all ADAC Reisen stores promoting the island of Ireland until the end of this year. A digital campaign is also running on adacreisen.de and adac.de.
- **Halloween:** activity includes online competitions, a partnership with DERTOUR Reisebüro and island of Ireland ads running in the Halloween areas of two major German theme parks.



Tagung in Dresden: TSS feiert 30-jähriges Bestehen



10/14 Informationsstände, Destinationen, Hotels und Leistungserbringern standen den Besuchern Frage und Antwort. (Foto: EVM Marketing)



Unvergessliche Erlebnisse und tolle Urlaubserinnerungen - Irland lässt dein Herz höher schlagen



irland.com/de-de Was liebst du an Irland? Weitere Infos

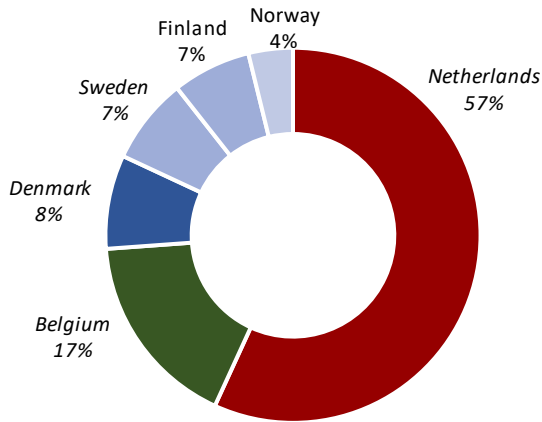
Austria and Switzerland

- **Picture This concert competition:** activity around Irish band Picture This generated 250,000 impressions (opportunities to see) in the two markets.
- **Familiarisation trips:** includes two tour operator trade familiarisation visits from Austria and Switzerland, in October and November.
- **Media visits:** recent highlights include 10 Swiss and Austrian journalists visiting Northern Ireland with a city, coastal and lakelands itinerary.
- **Festival:** The first 'Irish Festival Fribourg' took place this October in Fribourg, Switzerland, and included island of Ireland themed author presentations, whiskey tasting and cinema movies.



Access update

December 2023 Northern Europe to IOI forecast seat capacity



December 2023 total seats: 150,000

News

Netherlands, Belgium and the Nordics

- Direct air seat capacity from the Netherlands, Belgium and the Nordics to the island of Ireland for this forthcoming December will be above December 2019 levels.

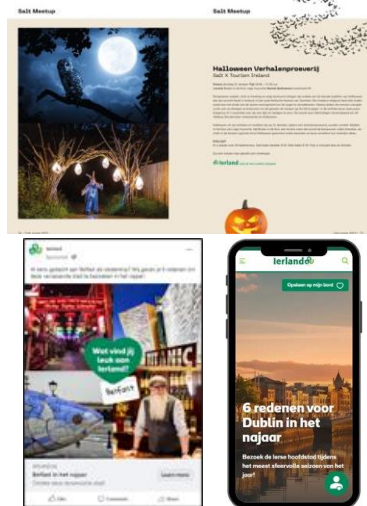
Market activity update

Netherlands and Belgium

- **Halloween:** activity included a trade event, a storytelling event with *Salt Magazine* and an influencers activation in the Netherlands, promoting the island of Ireland as the 'Home of Halloween'.
- **Off-season campaign:** a short breaks campaign promoting Dublin and Belfast has delivered over 16.5 million impressions (opportunities to see) to date.
- **Trade familiarisation trips:** several tier 1 tour operators will be travelling to the island of Ireland in Q4, to explore the off-season experience.
- **Media workshops:** attending several media workshops in Belgium and the Netherlands; networking with media on key themes and media visits in 2024.
- **Media visits:** upcoming visits include *Libelle*, *Libelle Lekker* and *C Magazine*, to Dublin and Wicklow (reach of 200,000+); and *Margriet* (reach 560,000+) will cover Ireland's Hidden Heartlands and wellness.
- **Online travel agent:** partnership with Cheaptickets (online travel agent) is live in the Netherlands and Belgium (Flanders only) until the end of November, promoting off-season travel to Dublin.

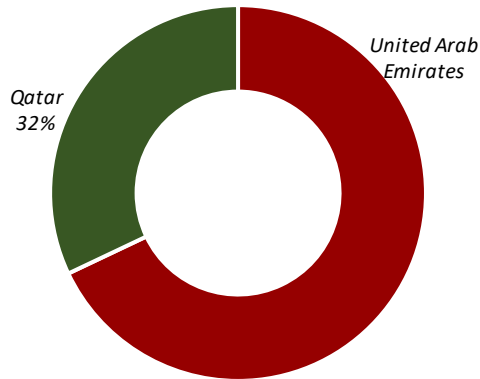
Nordics

- **Off-season campaign:** a short breaks campaign promoting Dublin and Belfast is live in Sweden, Denmark and Norway and will deliver 12 million impressions.
- **Irish evening:** We hosted an Irish evening with the Irish embassy in Denmark, promoting Irish culture and music to an audience of trade partners and diaspora.
- **Trade familiarisation trip:** a recent pan Nordic fam trip for 11 Nordic tour operators visited Northern Ireland, Dublin and the North-West.
- **OTA Partnerships:** partnerships are currently live with Tryp.com, Etraveli and Kayak and Momondo, promoting off-season city breaks to Dublin and Belfast.
- **Co-op marketing:** activity is live with Widerøe Airlines, promoting its new Bergen to Dublin service.
- **Partnership with Sports 24:** currently live with Danish sports / outdoor brand Sports 24; includes an ezine to the Sports 24 database of 880,000 consumers.
- **Media visits:** Upcoming visits include Denmark's *Jylland's Posten* visiting Belfast to report on C.S. Lewis and gastro-pubs; and Norway's *Borte Best* will participate in the Púca Festival Fáilte Ireland group trip.
- **Golf:** a campaign promoting 'Golf in Ireland's Hidden Heartlands' is currently live with well-known Nordic golf publications *Svensk Golf* and *Dansk Golf*.



Access update

December 2023 Emerging Markets forecast seat capacity



December 2023 total seats: 48,000

News

Middle East:

- Direct services to Dublin from the Middle East continue with Emirates Airlines, Etihad Airways and Qatar Airways.

Market activity update

Global Inbound

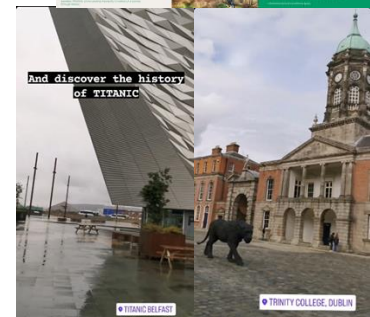
- **Flavours of Ireland:** this workshop brought around 70 island of Ireland industry partners together with global inbound tour operators via a workshop of one-to-one meetings in London; the workshop was followed by a networking dinner.
- **Attendance at the Global European Marketplace:** B2B workshop in London run by ETOA, offering opportunities to meet influential global and European buyers.
- **Kuoni Tumlare partnership:** a series of newsletters about the island of Ireland, highlighting a commitment to sustainable and luxury travel, which have been core themes throughout the collaboration.

Middle East

- **Al Rais Travel and Kildare Village partnership:** targeting Emiratis and Arab nationals to travel to the island of Ireland in Q4. The campaign is running on multiple channels including print, radio, social and digital and also includes in-store activation.
- **Partnership:** with Musafir.com, the UAE's most popular online travel agency, includes digital and print, as well as an influencer trip to the island of Ireland.
- **Etihad Airways:** a tactical campaign ran in October with a focus on driving bookings on Etihad flights to Ireland for UAE national holidays in December.
- **Golf in Ireland:** packages with dnata Travel and Dubai Golf, in partnership with G Golf travel and Sullivan Golf Travel, promoting island of Ireland golf packages in the 2024 shoulder season.
- **Media visits:** Arabic travel and lifestyle journalists visited the island of Ireland in September. Media included *Emarat Al Youm* newspaper, *Al Khaleej* newspaper, *Laha* magazine and *Yasmina.com*.

China

- **Awards:** the island of Ireland won Best Golf Destination at the 2023 World Leisure Awards in Beijing.
- **ETOA Asia and ITB China:** travel trade workshops with Tourism Ireland undertaking a series of B2B meetings with key Chinese travel trade.



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