

# SOAR

## (Situation & Outlook Analysis Report) October 2024



The Organisation for Economic Co-operation and Development's (OECD) [latest Economic Outlook](#) states that global output growth has remained resilient and inflation has continued to moderate. Recent activity indicators suggest ongoing momentum, especially in services sectors. Real wage growth is now supporting household incomes and spending, although purchasing power has yet to fully return to pre-pandemic levels in many countries. Global trade is recovering faster than expected, but shipping costs remain elevated. Global GDP growth is projected to stabilise at +3.2% in 2024 and 2025, with further disinflation improving real incomes and less restrictive monetary policy in many economies helping underpin demand.



Direct air access to the island of Ireland is holding relatively steady. Based on OAG filings, scheduled seat capacity to the island of Ireland for November 2024 will be on a par (100%) with November 2023 levels.

Air seat capacity to Ireland is forecast to be at 100% of November 2023 levels, with Northern Ireland scheduled at 98%, which is mainly due to fewer scheduled seats from Liverpool, according to OAG filings.



The Central Statistics Office (CSO) has released inbound tourism statistics for Ireland for the first nine months of 2024. From January to September 2024, overseas tourists generated €4.85 billion for the economy, +16% increase on the same period in 2023. Over 5.2 million overseas tourists visited Ireland, a +10% increase year-on-year. These overseas tourists stayed almost 39 million nights, down -2%. The average length of stay was 7.4 nights, which is slightly down. While revenue growth is positive, industry challenges include increased costs and changes to spread of visitors, based on length of stay and accommodation availability.



Tourism Ireland's extensive programme of promotions in key overseas markets 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 – is currently live in 13 key overseas markets. Since launch, the campaign video has achieved results reflecting a strong audience response: 14 million views on English [YouTube](#), >100 million views across languages and channels (TV, cinema, online) and has doubled awareness of origins of Halloween on the island of Ireland to win visitors. We have a comprehensive publicity programme and are posting daily on social media to our 7 million followers around the world. Trade events such as the upcoming World Travel Market support local businesses from the island of Ireland contracting with overseas tour operators to bring visitors at scale for the years to come.



According to UN Tourism's (formally known as the United Nations World Tourism Organisation) latest [World Tourism Barometer](#), an estimated 790 million tourist arrivals (overnight visitors) travelled internationally in the first seven months of 2024. This was +11% more than in the same period of 2023. Results were driven by continued strong demand, particularly in Europe, the re-opening of markets in Asia and the Pacific, increased air connectivity and visa facilitation.

## 2024 Forecast Economic Outlook trended by month

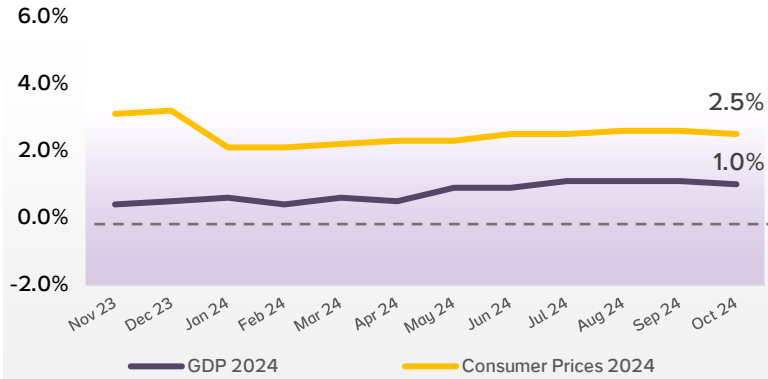
Source: Oxford Economics

### Great Britain

Oxford Economics expects that wage growth will continue to outpace inflation, supported by recent high public sector settlements. Strengthening confidence should mean that solid real income growth translates into a more meaningful pickup in consumer spending. However, fiscal policy remains a key source of uncertainty, with the upcoming autumn budget likely to reveal more. Oxford Economics forecasts UK GDP growth of +1% this year.

#### Exchange rate

Oct '23 £1 : €1.16      Oct '24 £1 : €1.19

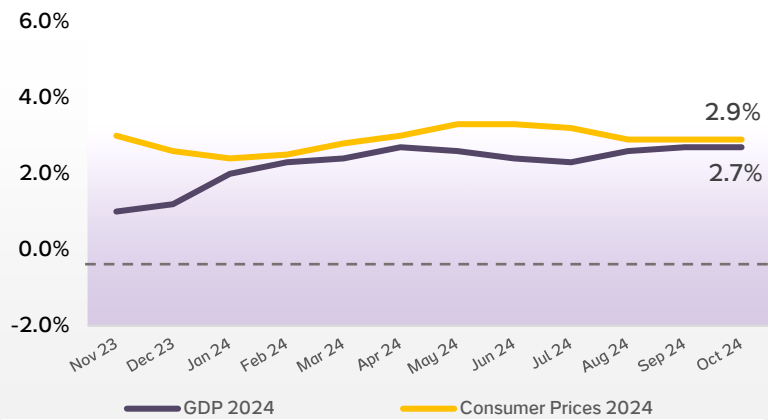


### US

Oxford Economics has raised its 2024 GDP growth forecast by 0.1ppts to +2.7%, mainly due to an upward revision of Q2 GDP. While the labour market has weakened, consumer spending has held up, supported by high household wealth and decent gains in real disposable income. Inflation has moderated and is moving toward the Fed's target, with further interest rate cuts expected over the next few months.

#### Exchange rate

Oct '23 \$1 : €0.95      Oct '24 \$1 : €0.91  
 Oct '23 \$1 : £0.82      Oct '24 \$1 : £0.76

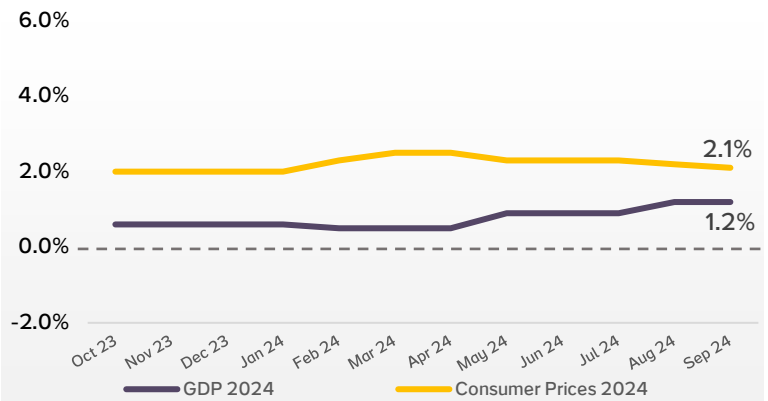


### France

The economy has been resilient this year, thanks to activity in the first half of the year and the one-off boost to growth from the Paris Olympics in Q3. However, Oxford Economics believes economic fundamentals are weak and forecasts 2024 GDP growth at just +1.2%. Beyond that, Oxford Economics has not changed its view that the economic outlook remains cloudy and thinks the recovery will take time.

#### Exchange rate

Oct '23 €1 : £0.86      Oct '24 €1 : £0.84

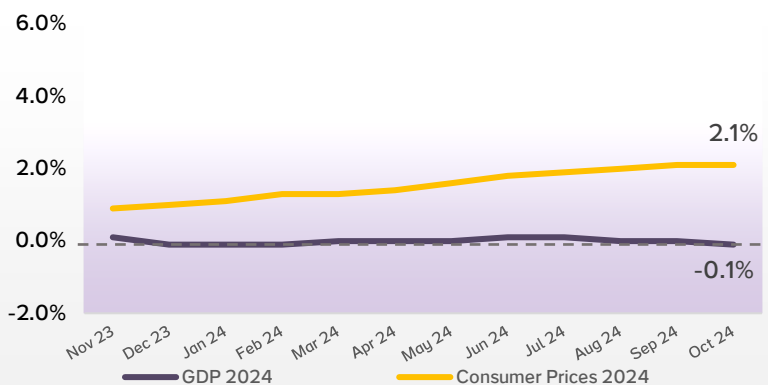


### Germany

The economy is struggling to gain any momentum, with recent economic data releases continuing to disappoint. Retail and consumer services surveys continue to weaken, signalling that households remain hesitant to spend their real income gains, given high interest rates and a softening labour market. Oxford Economics' latest GDP forecast is for zero (-0.1%) growth this year.

#### Exchange rate

Oct '23 €1 : £0.86      Oct '24 €1 : £0.84

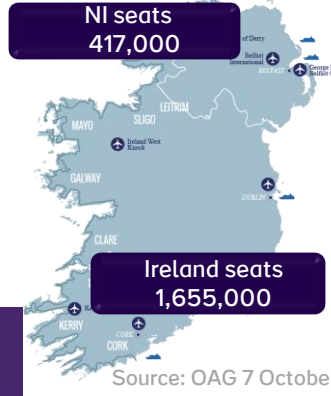
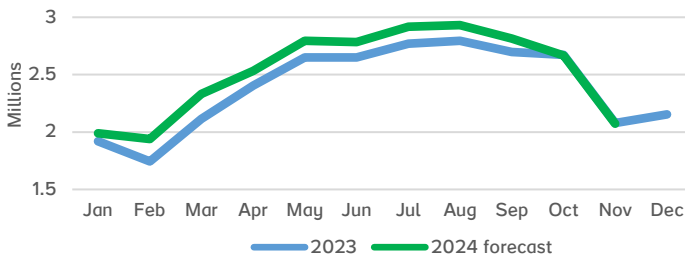


# Island of Ireland Access Situation



## OAG Scheduled Seat Capacity November 2024

Island of Ireland Scheduled Seats

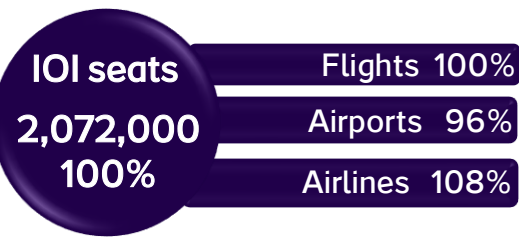
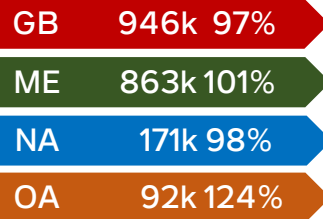


Based on OAG filings, scheduled seat capacity to the island of Ireland for November 2024 will be on a par (100%) with November 2023 levels. Air seat capacity to Ireland is forecast to be at 100% of November 2023 levels, with Northern Ireland scheduled at 98%, which is principally due to fewer seats from Liverpool.

Seat capacity to the island of Ireland for November 2024 is scheduled at 100% of the level it was in November 2023.

## Air Access November 2024 – % share of November 2023

### IOI Seat Capacity



OAG's scheduled air seat capacity to the island of Ireland for November 2024 from Mainland Europe (101%) and Other Areas (124%) is above November 2023 levels; however, North America (98%) and GB (97%) are marginally behind.

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

Source: OAG 7 October

## Airport Seat Capacity Forecast – November 2024

According to OAG, Belfast City Airport and Belfast International Airport are filed at 100% and 96% respectively of November 2023 levels. City of Derry Airport is filed at 183%. Cork Airport and Dublin Airport are scheduled at 104% and 99% respectively of the seat capacity levels in November 2023. The Dublin Airport passenger cap is impacting seat capacity this winter season.

Kerry and Shannon are filed at 110% and 105% respectively. Ireland West Airport Knock is scheduled at 103% and Donegal will have overseas seats this November.

Airports	Nov. 2023 seats	Nov. 2024 seats	2024 % share of 2023
Belfast Intl.	289,752	277,765	96%
Belfast City	127,080	127,202	100%
City of Derry	6,552	11,982	183%
Dublin	1,408,654	1,397,682	99%
Cork	120,295	125,025	104%
Shannon	78,912	83,067	105%
Knock	36,433	37,648	103%
Kerry	10,382	11,423	110%
Donegal	0	456	N/A
<b>Total</b>	<b>2,078,060</b>	<b>2,072,250</b>	<b>100%</b>

Source: OAG 7 October

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

Ferry (both ways)	January-September 2023	January-September 2024	2024 % share of 2023
<b>GB – island of Ireland</b>			
Sailings	14,582	13,604	93%
Passengers	3,392,807	3,260,712	96%
Cars	990,576	944,717	95%

Ferry Passenger Traffic	January-Sep 2024 % share of January-Sep 2023
Northern Ireland	98%
Ireland	94%
Island of Ireland	96%

## 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) recently released inbound tourism statistics for Ireland for the first nine months of 2024. Percentage and volume changes in the tables below compare January to September 2024 with the same period in 2023.

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

Market Area	Spend* (€m's)	% Change	Trips (000's)	% Change	Nights (000's)	% Change	Av. Stay (Nights)	Vol Change	Av. Spend Per Trip* (€)	% Change
Great Britain	1,005	+14%	1,916	+7%	9,508	-3%	5.0	-0.5	525	+7%
North America	1,778	+24%	1,172	+15%	9,887	+16%	8.4	+0.1	1,517	+8%
Mainland Europe	1,653	+12%	1,858	+9%	14,616	-11%	7.9	-1.8	890	+2%
Other Areas	414	+11%	300	+13%	4,871	+1%	16.3	-1.9	1,382	-2%
<b>Total</b>	<b>4,850</b>	<b>+16%</b>	<b>5,245</b>	<b>+10%</b>	<b>38,882</b>	<b>-2%</b>	<b>7.4</b>	<b>-0.9</b>	<b>925</b>	<b>+6%</b>

Ireland welcomed over 5.2 million overseas tourists for the period January-September 2024 (+10% over the same period in 2023), generating €4.85 billion for the economy (+16%).

These overseas tourists accounted for 38.9 million nights. In the first nine months, overseas tourists typically stayed a week (7.4 nights), down from 8.3 nights during same period last year. On average tourists spent €925 per trip (+6% compared to the same period in 2023).

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

Purpose of Visit	Trips (000's)	% Change	Nights (000's)	% Change	Av. Stay (Nights)	Vol Change
Holiday	2,318	+19%	15,628	+13%	6.7	-0.3
Visiting Friends/Relatives	1,702	-4%	13,682	-9%	8.0	-0.5
Business	766	+15%	4,051	-2%	5.3	-0.9
Other	460	+14%	5,521	-16%	12.0	-4.2
<b>Total</b>	<b>5,245</b>	<b>+10%</b>	<b>38,882</b>	<b>-2%</b>	<b>7.4</b>	<b>-0.9</b>

Over two-fifths (44%) of overseas tourists were holidaymakers, who typically stayed 6.7 nights in Ireland.

Visiting friends and relatives (VFR) was cited as their main reason for visiting Ireland by almost one-third (32%) of tourists and they stayed an average 8 nights.

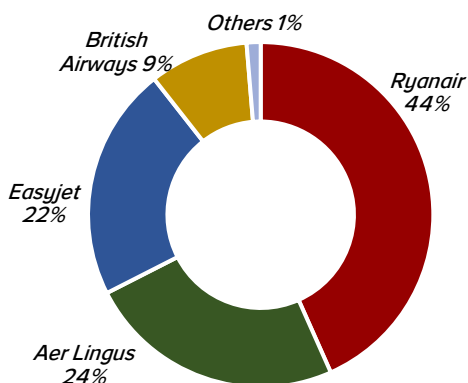
Around one-in-seven (15%) of overseas trips were for business reasons, with a typical stay of 5.3 nights.

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



## Access update

### November 2024 GB to IOI forecast seat capacity



November 2024 total seats: 946,000

### News

- Aer Lingus Regional, operated by Emerald Airlines, will commence a new four-times weekly service from Glasgow to Cork, from 27<sup>th</sup> October 2024, operating year-round.
- Aer Lingus Regional is also increasing capacity on its existing Bristol to Cork service.

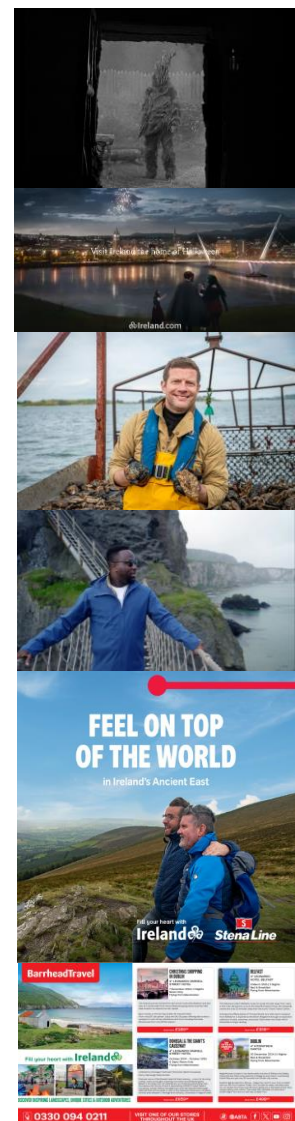
## Market activity update

### Inspiring Visitors

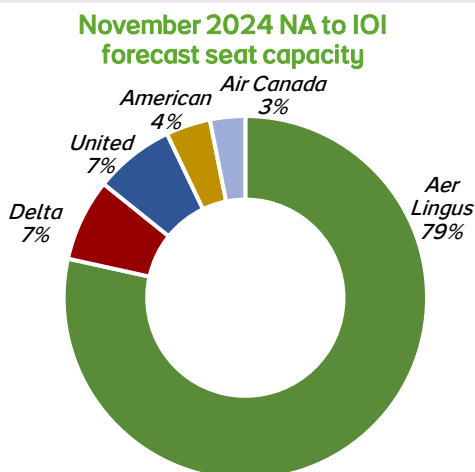
- **Home of Halloween campaign:** our campaign kicked off in September on Broadcast Video on Demand (BVOD), YouTube, social and TV; it will deliver over 94 million opportunities to see (OTS) in GB. The campaign is supported by a programme of publicity including History Hits podcast and broadcast; and content creators attending Púca, Derry Halloween and Macnas.
- **'Dermot's Taste of Ireland':** a five-part TV series aired on ITVX, hosted by Dermot O'Leary, showcasing the island of Ireland's food, scenery, culture and welcoming locals. Articles about the series appeared in the *Daily Mail*, *Daily Telegraph*, *The Times*, *Daily Mirror*, *TTG*, *Country and Town House*; Dermot also spoke about it on *Good Morning Britain*. Opportunities to see are forecast at 10 million.
- **Channel 4 'Where to Next?':** a three-part mini-series starring British comedian and actor Babatunde Aléshé travelling around the island of Ireland. The digital-first mini-series is on Channel 4's YouTube and streaming platform, as well as on Channel 4's Facebook, Instagram and TikTok – delivering eight million opportunities to see and supported by publicity, email and our own social.
- **Golf:** Tourism Ireland attended the BMW PGA Championship at Wentworth in September, highlighting our world-class golf, The Open at Royal Portrush in 2025 and Ryder Cup at Adare Manor in 2027. Tourism Ireland was joined by industry partners Royal Belfast GC, Green Golf Ball, INUA/Muckross Park Hotel and Harvey's Point.

### Strengthening Partnerships

- **Co-operative (co-op) carrier activity:** campaigns are live with Ryanair and Stena Line, to drive incremental bookings to our regions.
- **Partnerships:** includes activity with Skyscanner from September to November, promoting ease of access to the Wild Atlantic Way. Other partnerships are under way with TripAdvisor, Expedia, Secret Escapes, Travelzoo and Kayak, promoting short breaks to the island of Ireland.
- **Travel Weekly trade communications:** are live this September and October highlighting *Dermot's Taste of Ireland* TV series and encouraging off-season travel.
- **GB trade co-op:** includes activity this October with Barrhead Travel (print, digital and social) and with McKinlay Kidd (social media), promoting shoulder season travel.
- **TTG Day of Luxury:** Tourism Ireland was joined by luxury partner Nigel O'Reilly Jewellery Design at this B2B workshop in London. The event was a platform to meet with GB luxury agents and operators and to drive future sales opportunities.



## Access update



November 2024 total seats 171,000

## News

### United States

- Delta Airlines has announced a new service from Detroit to Dublin, adding to its services from JFK, Boston, Minneapolis St-Paul and Atlanta. The new route starts on 7<sup>th</sup> May 2025.
- Aer Lingus will commence a new Nashville to Dublin service on 12<sup>th</sup> April 2025, operating four times weekly. Aer Lingus has also announced a new route from Indianapolis to Dublin, operating four times a week from next May.
- The total number of US gateways with non-stop services to the island of Ireland for summer 2025 now stands at 20.
- The American Airlines Dallas-Fort Worth to Dublin service will not run through the winter, due to aircraft shortages; however, it is expected to return year-round in 2025.

## Market activity update – United States

### Inspiring Visitors

- **Aer Lingus College Football Classic:** a campaign targeting Florida State and Georgia Tech fans resulted in an estimated 25,000 people travelling to Ireland in August. Tourism Ireland sponsored the ESPN pre-game show, bringing it to Dublin for the first time. Coverage included our stunning scenery and traditional sports and culture and the show was seen by a record-breaking 2 million+, while a further 5 million people watched the game across the US.
- **Fill your heart with Ireland campaign:** our campaign continues with significant digital and social activity and will deliver 202 million opportunities to see by November.
- **Wild Atlantic Way campaign:** activity encouraging visitors to avail of direct flights to Shannon in key gateway cities of Boston, New York and Chicago reached 33 million across digital, social and outdoor channels.
- **Publicity PBS broadcasts:** Tourism Ireland hosted top tier TV crews in Ireland whose shows will broadcast across the US. These included *Ireland with Michael* (season 5), which will be distributed across 48 states on 680 PBS channels in 97% of all US households, as well as *Barefeet with Mickela Mallozzi*. Other projects included *Canvassing the World* and *Stepping Out* – about Ireland through the eyes of an artist and as a river cruise destination.

### Strengthening Partnerships

- **Industry leaders' roundtable:** 30 top travel trade and media partners joined Tourism Ireland for a lunchtime roundtable event in Chicago, on the occasion of the visit by the Economy Minister for Northern Ireland, Conor Murphy MLA, to discuss opportunities for growing tourism to Northern Ireland from Chicago and the Midwest.
- **Luxury travel marketing:** Tourism Ireland promoted the island of Ireland to luxury travel advisors at both Virtuoso Travel Week and ILTM North America. An enhanced presence at both events resulted in 850+ one-to-one meetings, events hosting 250+ travel advisors and media, providing a platform for 26 island of Ireland industry partners to do business.
- **Travel trade event:** Tourism Ireland hosted a travel trade event, in conjunction with The Bay Area Prostr Travel Network, in San Francisco. Aer Lingus, The Fitzwilliam Hotel Dublin and Aghadoe Heights attended, helping promote the island of Ireland to 95 luxury travel advisors.
- **LGBTQ+ activity:** Tourism Ireland sponsored the San Francisco Pride Pro-Am Golf Tournament, which is the world's largest LGBTQ+ golf tournament operated in conjunction with the PGA.
- **Milwaukee Irish Fest:** targeting the Diaspora, in August, Tourism Ireland exhibited at the 43<sup>rd</sup> annual and largest festival of Irish culture and heritage in the US, which attracted 130,000 visitors over four days.



## Market activity update

### Canada

#### Inspiring Visitors:

- **Fill your heart with Ireland campaign:** a four-week campaign ran on linear TV in Ontario targeting the Greater Toronto Area (GTA) and Ottawa throughout September; ads ran around culture and news programming and delivered 10+ million opportunities to see.
- **Golf Talk Canada:** a one-hour Ireland special will air in November, highlighting hidden gems in Ireland's Northwest to 1.2+ million viewers.
- **Influencer activity:** influencer Jennifer Valentyne – with a reach of two million – is visiting in October, to highlight food and drink, ancestry and Halloween festivities in Ireland's Ancient East, Northern Ireland and the northern section of the Wild Atlantic Way.

#### Strengthening Partnerships:

- **Air Canada United Airlines Race:** 40 top travel advisors, trade media and airline executives visited the island of Ireland, as part of the annual Air Canada United Airlines Race event. Highlights included a workshop with 60 industry partners and familiarisation visits to the Wild Atlantic Way, Ireland's Ancient East, Ireland's Hidden Heartlands and Northern Ireland, to increase overall sales to the island of Ireland and further develop itineraries to the regions.
- **ACTA Summit:** Tourism Ireland participated in the ACTA (Association of Canadian Travel Agencies) Eastern Canada Summit in Toronto in September, highlighting food, drink and entertainment, with live music delivering standout for Ireland among 400+ advisors.
- **Industry Leaders Roundtable:** 20 top travel trade and media partners joined Tourism Ireland for a breakfast roundtable event in Toronto in September, on the occasion of the visit by the Economy Minister for Northern Ireland, Conor Murphy MLA, to discuss opportunities for growing tourism to Northern Ireland .

### Australia

#### Inspiring Visitors:

- Tourism Ireland is partnering with *Concrete Playground*, an online magazine specialising in digital destination guides, to produce four guides under the headline 'Your Perfect Somewhere'. The guides will highlight Northern Ireland, the Wild Atlantic Way, Ireland's Hidden Heartlands and Ireland's Ancient East – including some of the best things to eat, see and do and featuring tourism businesses and 'hidden gems'. Three videos were also produced to complement the content. The guides will be promoted by *Concrete Playground* on its homepage and social channels, including TikTok, reaching 1.45 million.
- **Channel 9 Postcards travel TV show:** the popular holiday and travel show filmed in Donegal and Northern Ireland in September. The episode will air in November to an audience of 230,000 across Australia on Nine Network, with repeats airing on 9Life (digital TV channel).
- **Home of Halloween campaign:** our campaign in Australia includes social media, paid search, content seeding and email marketing this October.

#### Strengthening Partnerships:

- **Turning 'lookers into bookers' tactical campaign:** phase two of Tourism Ireland's partnership programme launched in September. Featuring six partners, the online consumer campaign features partner offers and packages, promoted via social and digital channels, as well as online advertising on well-known travel websites.
- **Ireland's Hidden Heartlands B2B promotion:** in September, Tourism Ireland hosted a webinar with industry partners representing Ireland's Hidden Heartlands. We also promoted the region via a travel trade media campaign and on our own consumer channels.
- **Partner activity:** a campaign with Expedia ran in September, designed to drive conversion and combining great reasons to travel to the island of Ireland with competitive fares.



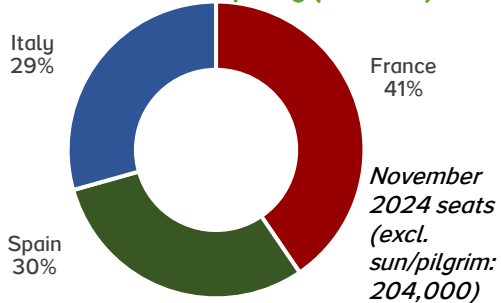


# Southern Europe – France, Italy and Spain



## Access update – Southern Europe

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



### News

#### France:

- Stena Line is replacing the Stena Vision ferry on its Cherbourg to Rosslare route with the smaller Stena Horizon, from 27<sup>th</sup> October.

#### Italy:

- Ryanair will operate a new service from Turin to Belfast International from November 2024 to March 2025.

#### Spain:

- Aer Lingus will commence a route from Seville to Dublin three times a week from the end of October.

## Market activity update

### France

#### Inspiring Visitors

- **Fill your heart with Ireland short break campaign:** our campaign is live, promoting Belfast, Cork, Dublin and Galway on YouTube, Facebook and Instagram, and will deliver an estimated 70 million opportunities to see.
- **Halloween in-market activity:** includes a 20-minute podcast with radio station Europe 1 (140,000 reach); and a media partnership and advertorial with lifestyle website LeBonbon.fr (1 million reach).

#### Strengthening Partnerships:

- **Co-op activity:** campaigns are running with Chalair, Brittany Ferries, Aer Lingus and Voyage-Privé, to drive Q4 and Q1 2025 bookings. A campaign with Odigeo (online travel agent) has been running in October, promoting Halloween festivals and shoulder-season travel.
- **Partnerships:** with Perfect Stay and FRAM are highlighting tours and self-drive options.
- **IFTM Trade show:** 15 island of Ireland industry partners attended, with 675 meetings taking place.
- **Northern Ireland familiarisation trip:** eight representatives of key French tour operators visited Northern Ireland in September.

### Italy

#### Inspiring Visitors:

- **Fill your heart with Ireland short break campaign:** our campaign is live, promoting visits to Cork, Galway, Belfast and Dublin; it will reach over 50 million.
- **Media trip:** six journalists visited Northern Ireland to experience Belfast 2024 events and the opening of the Derry-Londonderry Peacemakers Museum.

#### Strengthening Partnerships:

- **Wild Atlantic Way access campaigns:** digital campaigns are live with Ryanair and LastMinute.com, promoting direct flights this autumn to Cork, Shannon and Ireland West Airport Knock.
- **TTG trade show:** nine industry partners attended the show in Rimini. Our Halloween media and trade event on our stand was organised to drive awareness of the Home of Halloween and off-season travel to Ireland.

### Spain

#### Inspiring Visitors:

- **Fill your heart with Ireland short break campaign:** our digital campaign will deliver over 35 million opportunities to see over four weeks, geo-targeted in key gateways and driving consideration to travel.
- **Media trips:** include with TV crews (from EFE and TVE) visiting the new Peacemakers Museum; and Libertad digital radio and content creator cristiandelgadofdez visiting Derry Halloween.

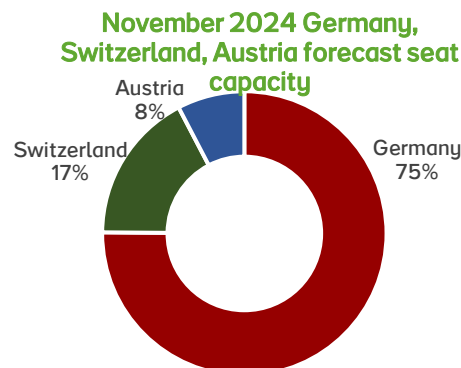
#### Strengthening Partnerships:

- **OTA campaigns:** includes activity with Atrápalo and Logitravel on digital channels and in Fnac store screens in key locations. Major activations with Viajes El Corte Inglés and B Travel continue until November, featuring digital outdoor ads in Madrid and Barcelona.
- **B2B events:** recent B2B events included a Wild Atlantic Way webinar; a Northern Spain sales mission with Special Tours; and a roadshow visiting Seville, Madrid, Valencia, and Barcelona, engaging with 600 travel professionals and facilitating 400 meetings.





## Access update



November 2024 total seats: 120,000

### News

#### Germany:

- Lufthansa will discontinue flights between Frankfurt and Belfast City Airport from the end of October.

#### Austria and Switzerland:

- Edelweiss' seasonal Zurich to Cork service stopped at the end of September and is scheduled to resume in April 2025.

## Market activity update

### Germany

#### Inspiring Visitors

- **Winter campaign:** was live from mid-August to mid-September on programmatic, Facebook, Instagram, Pinterest, TikTok and castX; it also included media partnerships. The campaign delivered over 53 million impressions and 18 million video views.
- **Media partnership:** activity with geo.de to promote boating delivered 500,000 impressions.
- **Activities campaign:** a campaign promoting activities has just concluded on programmatic video, social media, castX and print; it also included advertorials.
- **Media familiarisation trips:** eight journalists – with a combined reach of 2.4 million – visited the Southeast of Ireland; their itinerary was themed around Vikings and castles and had a focus on seasonality.
- **Content creator trips:** seven influencers, with a combined reach of nearly 5 million, visited in Q3. The Wild Atlantic Way 10-year anniversary, Zeitgeist Ireland 2024 and boating were the main focus of the visits.
- **Partner activity:** campaigns are live with Lastminute.de and weg.de, and their partner networks, on various channels, highlighting the Wild Atlantic Way and regional access.

#### Strengthening Partnerships:

- **Luxury workshop:** a workshop with 50 travel agents from Dertour Deluxe in September showcased the best of the island of Ireland and generated 19 pages of coverage in the Dertour Deluxe brochure.
- **Carrier co-op:** activity with Ryanair and Lufthansa is promoting regional routes.
- **Tour operator familiarisation trip:** six leading German tour operators explored Ireland's Hidden Heartlands.
- **Business Events familiarisation visit:** eight key German MICE decision-makers took part in a four-day familiarisation visit to Dublin, Kildare, Wicklow and Kilkenny, in September.

### Austria and Switzerland

#### Inspiring Visitors

- **OTA campaign:** a short break campaign with Expedia is currently live in Austria and Switzerland, highlighting both Northern Ireland and Ireland.
- **Influencer activity:** Swiss travel influencer kitkat\_ch highlighted 10 years of the Wild Atlantic Way to her 270,000 followers, during her visit to West Cork in September.

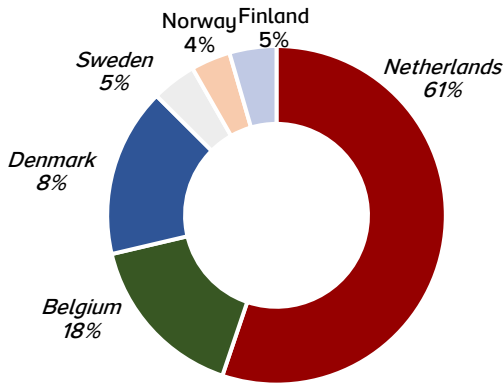
#### Strengthening Partnerships:

- **Roadshow:** an Austria and Switzerland roadshow took place in September, facilitating one-to-one meetings for eight island of Ireland industry with 80 Swiss and Austrian travel trade partners.
- **Familiarisation trip:** tour operator Dertour Suisse experienced new products along the Wild Atlantic Way and Ireland's Hidden Heartlands during a recent familiarisation trip.



## Access update

### November 2024 Northern Europe to IOL forecast seat capacity



November 2024 total seats: 147,000

### News

#### Netherlands and Belgium

- KLM will add an additional daily flight between Belfast City Airport and Amsterdam from 28<sup>th</sup> October 2024, bringing the service to twice daily.

## Market activity update

### Netherlands and Belgium

#### Inspiring Visitors

- **Travel media:** leading Dutch online travel media platform Reishonger visited Derry-Londonderry, Belfast and the Causeway Coast in October, producing 64 social media stories and posts and generating over 1,800 quality engagements with followers on Instagram and Facebook.
- **Media coverage:** two-page articles on Púca and Halloween in Ireland appeared recently in *Het Nieuwsblad* and *Het Belang van Limburg* (Belgian newspapers), delivering combined impressions of 550,000. Other coverage in October included an article in *Het Laaste Nieuws* (Belgian daily newspaper) on gastronomy along the Wild Atlantic Way, delivering 500,000 impressions.

#### Strengthening Partnerships:

- **B2B workshops:** 21 industry partners from the island of Ireland and 17 Belgian and 20 Dutch trade partners connected at our B2B workshops in Brussels (Belgium) and Amersfoort (the Netherlands), with over 388 meetings taking place.
- **Trade familiarisation trip:** a leading Dutch tour operator, together with 16 travel agents and a trade publication, visited the west coast of Ireland; the visit was timed to coincide with the launch of a new charter flight from Groningen Airport to Ireland West Airport Knock.
- **Halloween B2B storytelling event:** five island of Ireland industry partners met with 20 Belgian trade partners in Ghent at the end of October, to highlight the unique opportunities on the island during autumn and winter.

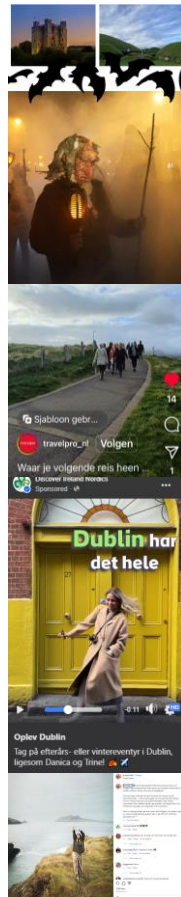
### Nordics

#### Inspiring Visitors

- **City break campaign:** a campaign is live on social media channels in Denmark and Sweden, promoting reasons to visit Dublin and Belfast during the autumn and winter.
- **Influencer activity:** three Swedish influencers recently visited the island of Ireland and promoted key messages about the 10<sup>th</sup> anniversary of the Wild Atlantic Way, as well as reasons to visit Dublin and Belfast this autumn and winter, to their combined audience of over 200,000.
- **Travel show:** Danish travel expert Anne-Vibeke Rejser recently filmed along the Wild Atlantic Way, in Galway, Clifden, Westport and Sligo. The episode is scheduled to air on DK4 this October.

#### Strengthening Partnerships:

- **ANTOR Norway roadshow:** Tourism Ireland participated in a roadshow which visited Bergen, Trondheim and Oslo, meeting with 64 Norwegian travel trade partners.
- **Online travel agent partnership:** a campaign with Expedia is live, with a focus on promoting off-season city breaks to the island of Ireland; it will run until the end of November.
- **Trade familiarisation trip:** 12 Nordic operators visited in September and their itinerary included Dublin, Wicklow, Waterford and Kilkenny.



## The Home of Halloween

Today, Halloween is celebrated around the world, yet not everyone is aware of its origins on the island of Ireland and the ancient festival of Samhain. In 2024, Tourism Ireland continues to embed the island of Ireland as the true Home of Halloween and a compelling destination for autumn travel with a striking new campaign.

Our distinctive black and white campaign has been designed to share the unique cultural heritage of Halloween on the island of Ireland, set against the backdrop of iconic landscapes and showing how the tradition thrives and is celebrated across the island today. Watch the 60" campaign video [here](#).



### The Campaign

The campaign launched in September to reach potential visitors in time for autumn bookings in 13 markets – Great Britain, the United States, Canada, Australia, Germany, France, Spain, Italy, Belgium, the Netherlands, Denmark, Sweden and Switzerland.

In the first month since launch, the campaign has achieved results reflecting a strong audience response:

- 14 million views on English language [YouTube](#)
- >100 million views across languages and channels (TV, cinema, online)
- 380,000 research sessions focused on Halloween festivals and activities on Ireland.com
- among those who saw the campaign, twice the level of recognition that Halloween began in Ireland and seven out of ten more likely to want to visit

Tourism Ireland estimates overseas visits to the island of Ireland over the Halloween period could be worth an incremental €60 million each year within five years, with sustained focus, supporting businesses and communities across the island.

The campaign is running until 31<sup>st</sup> October across multiple channels including TV, cinema and digital.

### In addition

To further highlight the island of Ireland's connection with Halloween, Tourism Ireland has been rolling out a busy programme of other promotional activity, including podcasts, B2B trade events and webinars, co-operative marketing and visits by international journalists to [Derry Halloween](#), [Púca Festival](#) in Meath and [Macnas](#) in Galway, as well as as live radio and satellite TV broadcasts from Derry Halloween.





**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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