

SOAR

(Situation & Outlook Analysis Report) September 2023



The International Monetary Fund (IMF) has marginally raised its global GDP growth forecast for 2023. The IMF's latest [economic outlook](#) points to falling inflation as a factor in its improved outlook for 2023. The IMF is projecting global GDP growth of +3% in 2023, up 0.2 percentage points from its April forecast. It has left its outlook for 2024 unchanged, also at +3%, which is weak by historical standards.

The IMF added, however, that the balance of risks facing the global economy remains tilted to the downside and that credit is tight.



A strong restoration of direct air access capacity to the island of Ireland is scheduled for this September. Based on latest OAG filings, scheduled air seat capacity to the island of Ireland for September 2023 will be 104% of September 2019 levels, with almost 2.7 million seats filed for the month.

Scheduled seat capacity from GB (107%), Mainland Europe (103%) and Other Areas (111%) is above 2019 levels. Seat capacity from North America is filed at 97% of September 2019 levels.



STR reports that hotel occupancy in Northern Ireland for January-July 2023 was 73%, up +3% on January-July 2019. In Ireland, occupancy was 78%, up +1% on January-July 2019.

The average daily rate (ADR) for a room in Northern Ireland in January-July 2023 increased by +33% to £105, when compared to the same period in 2019. In Ireland, the average daily rate in January-July 2023 was €169, up +34% when compared to the same period in 2019.



Tourism Ireland will roll out an extensive, highly targeted programme of promotions around the world over the coming months. We will highlight the many reasons to visit the island of Ireland during autumn and winter – including festivals like Púca, Derry Halloween, Wexford Festival Opera and NYF Dublin. Our autumn Fill your heart with Ireland campaign will get under way in our key overseas markets, celebrating the different ways in which Ireland fills the hearts of our visitors and of locals and inviting potential overseas holidaymakers to come and experience those for themselves.



The latest [travel sentiment report](#) from the European Travel Commission (ETC) points to Europeans adjusting travel plans due to cost worries. The research shows concerns over inflation and personal finances persist; however, Europeans are still eager to travel. While travel intent in Europe has seen a slight decline, demand still remains high. To cope with rising travel expenses, Europeans are adapting behaviours prior to reaching their destination. Many are searching for alternative travel choices, looking for more affordable experiences or considering off-season travel to stretch their budgets. Some are also seeking cheaper fares or aiming to book flights earlier than usual to get the best deal.

Economic Conditions



Great Britain

High inflation and interest rates continue to weigh on recovery; however, Oxford Economics expects a modest GDP increase in Q3. Core inflation is now being driven upwards by strong pay growth rather than energy costs. Given the enduring tightness of the labour market, Oxford Economics expects rate cuts will begin in Q3 2024, much later than the Fed and ECB. GDP growth of +0.5% is forecast in 2023.

Exchange rate

Aug '22 £1: €1.19 Aug '23 £1: €1.16

US

The economy is performing better than anticipated – GDP growth for 2023 is forecast at +2.1% – but there are several strains that may hit the economy later this year and in early 2024, including tighter monetary and fiscal policy. A challenge for any soft-landing scenario is that stronger-than-expected GDP growth would keep inflation elevated, pushing the Fed to raise rates in the second half of 2023 and delay the pivot to policy easing until well into 2024.

Exchange rate

Aug '22 \$1: €0.98 Aug '23 \$1: €0.91
 Aug '22 \$1: £0.83 Aug '23 \$1: £0.79

France

There was surprise growth in Q2; however Oxford Economics believes this was due to temporary factors and conceals the overall weakness of the economy. Deteriorating surveys and more stubborn inflation cloud the outlook for the services sector. Inflation did however fall to 4.3% in July, with nearly all categories declining. GDP growth is forecast at +0.7% for 2023.

Exchange rate

Aug '22 €1: £0.84 Aug '23 €1: £0.86

Germany

Oxford Economics forecasts the economy to broadly stagnate for the remainder of the year, as opposing forces mostly offset each other. Weak foreign demand and tighter monetary policy will be a major strain on industry and investment, while easing supply woes, falling energy prices and sharply slowing consumer prices will support consumer prospects. GDP growth is forecast at only +0.3% for 2023.

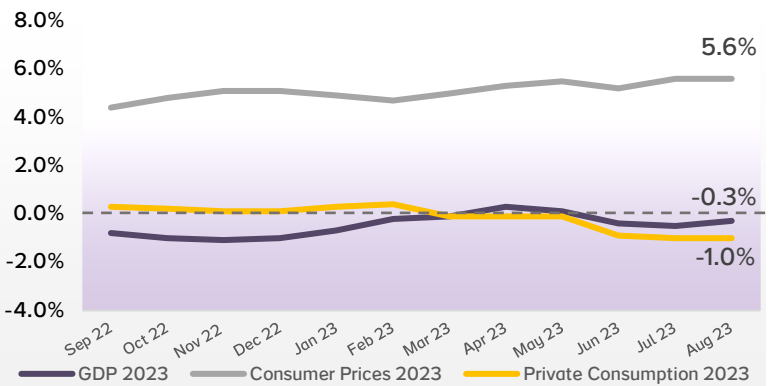
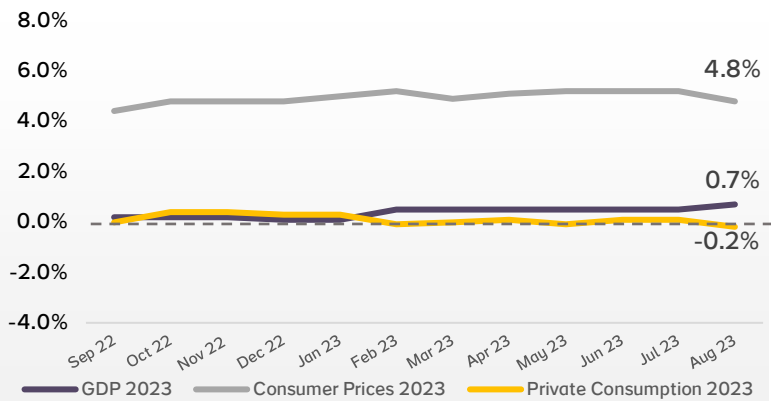
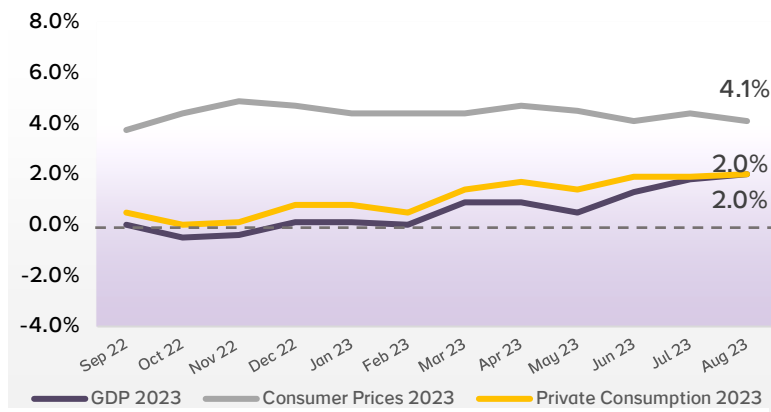
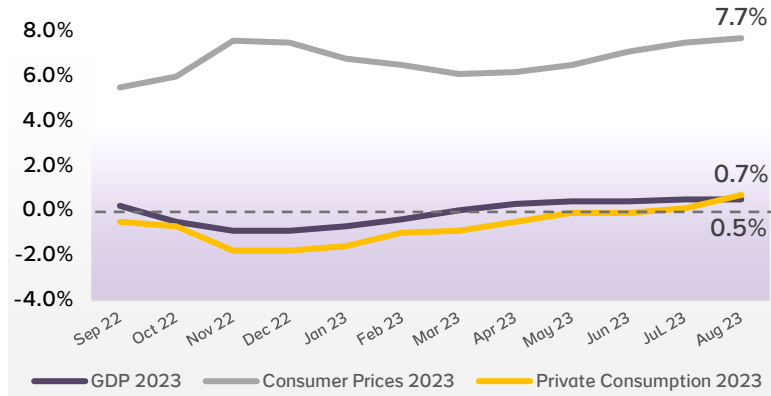
Exchange rate

Aug '22 €1: £0.84 Aug '23 €1: £0.86

NB: Currency rates as at 15 Aug '23

2023 Economic Outlook by Oxford Economics trended by month

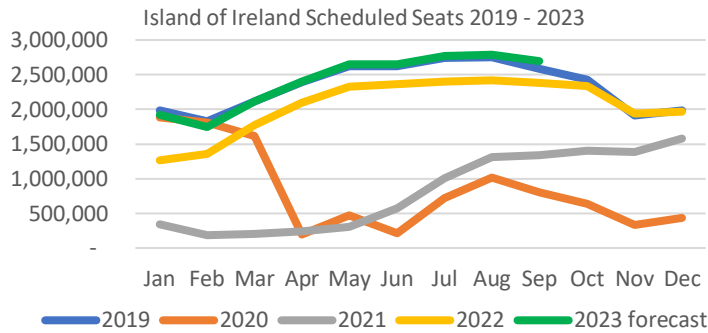
Source: Oxford Economics



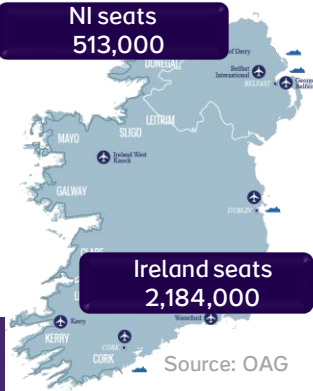
Island of Ireland Access Situation



Sept 2023 Forecast Seat Capacity



NI seats
513,000



Ireland seats
2,184,000

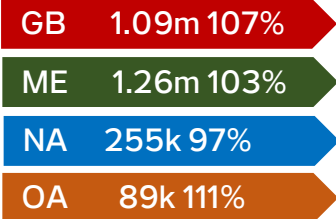
Source: OAG

There is a very positive outlook for direct air access capacity to the island of Ireland for September 2023, with almost 2.7 million seats filed. Based on latest OAG filings, air seat capacity to Ireland is planned at 104% of September 2019 levels, with capacity to Northern Ireland also scheduled at 104%.

Seat capacity to the island of Ireland for July 2023 was scheduled at 104% of the level it was in July 2019.

Air Access Sept 2023 forecast – % share of 2019

IOI Seat Capacity



IOI seats **2,697,000**
104%

Flights 15,769 100%

Airports 189 102%

Airlines 46 92%

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

Scheduled seat capacity from GB (107%), Mainland Europe (103%) and Other Areas (111%) is above 2019 levels. Seat capacity from North America is filed at 97% of September 2019 levels. Airlines are scheduled to operate almost 16,000 flights in September 2023.

Airports Forecast – Sept 2023

Cork and Dublin airports are currently filed to return to 111% and 103% of their respective September 2019 seat capacities. Belfast International Airport and Belfast City Airport are scheduled at 109% and 96% respectively.

Shannon (115%), Knock (114%) and Kerry (102%) are all filed above September 2019 levels.

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

Airports	Sept 2019 Seats	Sept 2023 Seats	2023% share of 2019
Belfast Intl.	346,118	376,099	109%
Belfast City	133,026	128,176	96%
City of Derry	11,309	8,700	77%
Dublin	1,785,965	1,834,840	103%
Cork	145,903	161,561	111%
Shannon	97,957	112,909	115%
Knock	48,215	55,192	114%
Kerry	18,522	18,949	102%
Donegal	726	528	73%
Total	2,587,741	2,696,954	104%

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

The latest performance data is for the first seven months of 2023 and shows ferry passengers to and from the island of Ireland at 95% of January-July 2019 levels. Northern Ireland passenger traffic was 103% and Ireland was 90%. Note: performance data from Spain is not available and thus not included in these figures.

Jan-July 2023 % share of Jan-July 2019

103%

90%

95%

Ferry (both ways)	Jan - July 2019	Jan - July 2023	2023% share of 2019
GB – island of Ireland			
Sailings	12,470	11,088	89%
Passengers	2,611,925	2,411,886	92%
Cars	652,131	700,397	107%
France – Ireland			
Sailings	431	729	169%
Passengers	206,278	266,231	129%
Cars	57,894	76,070	131%

CSO Inbound Tourism

The Central Statistics Office has released Inbound Tourism June 2023. This is the first release in a new monthly statistical series on inbound tourism to Ireland. It replaces the former Overseas Travel series and the Tourism and Travel series of the pre-COVID era.

The Inbound Tourism series is compiled using a very different sampling methodology and a very different mode of data collection. 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 Q2 2023

Main market area	Visitors (000's)	Nights (000's)	Spend* € (million)
Great Britain	617	3,084	396
Mainland Europe	583	5,123	574
North America	374	3,161	827
Other Areas	81	1,293	167
Total	1,655	12,662	1,963

*Spend includes fares

The first release of the new series provides data for the Q2 period (April-June) in 2023.

The CSO reports close to 1.7 million tourists taking overnight trips to Ireland during Q2 2023.

These inbound tourists stayed 12.7 million nights in Ireland spending close to €2 billion in Q2 2023.

Source: CSO

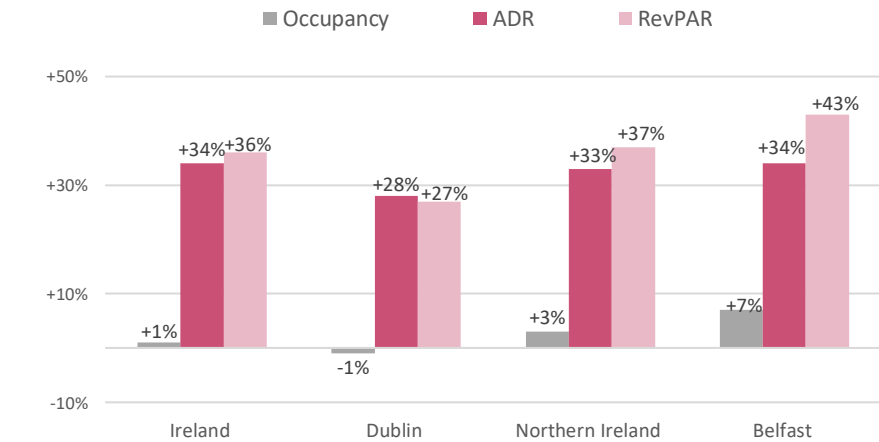
Hotel accommodation

Latest performance data available from STR reports that hotel occupancy for January-July 2023 in Northern Ireland was 73%, up +3% on January-July 2019. In Ireland, occupancy was 78%, up +1% on January-July 2019.

The average daily rate (ADR) for a room in Northern Ireland in January-July 2023 increased by +33% to £105 and in Belfast by +34% to £104, when compared to the same period in 2019.

In Ireland, the average daily rate in January-July 2023 was €169, up +34% when compared to the same period in 2019. The average daily rate in Dublin for the first seven months of 2023 was €181, up +28% on January-July 2019.

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



	Ireland	Dublin	Northern Ireland	Belfast
ADR	€169	€181	£105	£104
Occupancy	78%	82%	73%	76%

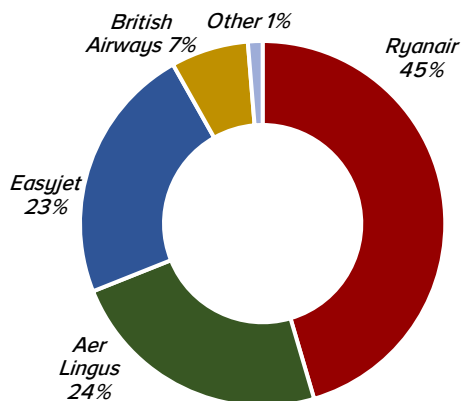
Note: Data include residents from the Republic of Ireland and Northern Ireland.

ADR = Average Daily Rate

Source: STR 2023

Access update

September 2023 GB to IOI forecast seat capacity



September 2023 total seats: 1.1m

News

- Loganair has added a third service between Glasgow and Donegal and is operating on Wednesdays, Saturdays and Sundays.

Market activity update

- Fill your heart with Ireland (FYHWI):** burst 2 goes live in September, with ads running on broadcast video on demand (BVOD), outdoor digital and social.
- Derry-Londonderry and Donegal:** a campaign highlighting 'two unique places, one amazing holiday' is live on outdoor, social and digital channels.
- Media visits:** recent visits have included *The Sunday Times* (cycling, Co Down), *Food & Travel* (local food stories, Co Down), *Coast* magazine (National Surf Centre) and *The Scottish Sun* (pet-friendly travel in Northern Ireland).
- Media coverage:** highlights included coverage in the *National Geographic Food* (Wild Atlantic Way), *Food & Travel* (Connemara), *The Scotsman* (food in Cork), the *i* (UNESCO Geopark in Northern Ireland), *Sunday Mirror* (Northern Ireland) and *Sunday Times* (Ballycastle beach).
- Media events:** include an event in London in early September for around 25 key GB media, highlighting the 10-year anniversary of the Wild Atlantic Way in 2024.
- Co-operative marketing:** campaigns with Ryanair, Stena Line and Aer Lingus will go live this autumn, focusing on ease of access to our regions and strong price points and will be aligned to brand activity. A partnership with Kayak will focus on Ireland's Ancient East. Co-operative campaigns will be undertaken with GB trade partners including Glenton Holidays, McKinlay Kidd and Barrhead Travel.
- MICE and luxury:** events include Aspire Autumn (4-5 Sept); M&I Awards (15 Sept); The Meetings Space (28-30 Sept); M&I Europe (30 Sept-2 Oct); Connections UK (25-27 Sept).
- Travel Industry Awards by TTG:** Tourism Ireland will be an event partner, collaborating with Boat Yard Distillery and Diageo, to showcase the NI Spirits Trail and the Guinness Storehouse.
- Golf:** Tourism Ireland will attend the BMW PGA Championships at Wentworth with partners including Portstewart Golf Club, Exceleator Golf Tours, Harvey's Point Resort and Donegal Hotels Collection.
- GB coach and group familiarisation trip:** 15 coach and group operators will visit Ireland's Ancient East on 28 September-1 October.
- Awards:** A 2022 campaign with Pepper Studio, TripAdvisor and Tourism Ireland about the North-West won 'Best Travel & Lifestyle' award at the Influencer Marketing Awards.

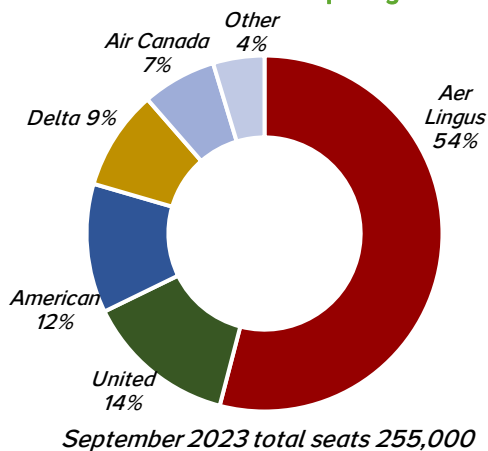


Explore Ireland's Hidden Heartlands & Cruising the Shannon
Get off the beaten track and discover the heart of the country where the focus is on getting back to nature, taking deep breathers and immersing yourself in a gentler form of tourism. Take a leisurely cruise along Lough Derg to the Shannon and enjoy the at slow pace. Explore 'off-grid' Ireland and discover a more subtle, easy-going part of the country. Meet local people involved in tourism and experience the unadorned friendliness that Ireland is so famous for. Slow down, breathe and relax; you may want to stay awhile.



Access update

September 2023 NA to IOI forecast seat capacity



News

United States

- The American Airlines service from Dallas to Dublin will become a year-round service at the end of October. American Airlines has also confirmed that it will begin its daily summer service between Dublin and Charlotte earlier next year, from 5 March.
- The new Aer Lingus Cleveland to Dublin flight will also operate year round.
- Aer Lingus has announced a new Denver to Dublin route commencing in May next year, which will operate four-times weekly.
- Aer Lingus will also reinstate its Minneapolis-St Paul to Dublin service from April 2024, initially operating four times per week, before increasing to a daily service from October next year.
- Delta will begin a new seasonal service from Minneapolis-St Paul to Dublin from May 2024, operating five times a week.

Market activity update

US

- **Fill your heart with Ireland:** TV activity concluded in July, with kickstart activity for 2024 planned for December. Ads on connected TV, digital and social media continue, which are complemented by a paid tactical programme.
- **Airline co-op:** a campaign with Delta continues, promoting autumn and winter travel from JFK, Atlanta and Boston. It includes programmatic display, social and in-airport screens. The total projected campaign audience is 7.8 million.
- **Aer Lingus College Football Classic:** the Notre Dame vs Navy game returned to Dublin on 26 August with a record 40,000 fans travelling from the US for the sell-out game. In stadium advertising provided prominent exposure of Ireland.com to a TV audience of almost 4 million on NBC.
- **Golf Digest's 'Big City Golf':** two-part series aired its first episode *The Best of Dublin On and Off the Course* in July, with the Belfast episode then airing in August. The series highlights the best of our golf, culture, food and experiences. Each episode features on the YouTube channel of *Golf Digest* and on a landing page on *GolfDigest.com*, supported with high impact Golf Ireland banner ads on the partner site. The programme will deliver at least 5 million impressions (opportunities to see).
- **Riverdance:** this partnership reached an audience of over 400,000, who viewed a 90-second video; 31,000 people also entered an online competition. Key media and travel trade contacts were hosted at two events, in San Jose and Denver.
- **Signature Travel Network:** Tourism Ireland met with 75+ travel agents at a two-day workshop in Los Angeles, to target several key segments including multi-generational, luxury and the great outdoors.
- **Luxury travel advisor events:** Tourism Ireland and five industry partners from the island of Ireland met with 35 luxury travel advisors at the LTA Ultra Summit in Arizona. We also participated in the annual Virtuoso Travel Week in Las Vegas, which was attended by 5,000 luxury travel professionals, as well as over 20 island of Ireland partners.
- **West Coast trade activity:** Coinciding with Irish Heritage Night, Tourism Ireland partnered with Authentic Vacations to host 22 travel advisors in San Francisco. The event included a workshop showcasing all the great things to see and do on the island of Ireland this autumn and winter.
- **Northern Ireland/Good Friday Event:** Tourism Ireland hosted 35 travel trade and media contacts at a special event in San Francisco celebrating the 25th anniversary of the Belfast Agreement of Good Friday; keynote speaker was Nancy Pelosi.
- **Media visit:** Tourism Ireland hosted eight leading golf journalists and influencers from top tier outlets such as *Golf Digest*, the *New York Post*, WFAN Radio and *Sports Illustrated* after the 2023 Open Championship at Royal Liverpool. The itinerary included Royal Dublin, the European Club and Rosslare Golf Links.



Market activity update

- **Bloomsday Influencer visit:** Four leading influencers, with a combined reach of 840,000+, visited Dublin and surrounds around Bloomsday, publishing 102 posts and generating 21,000 engagements and €195,000 in equivalent advertising value.
- **Media partnership:** *Let's Go with Catie Keogh* – a Tourism Ireland sponsored video piece filmed at Killary Fjord – is being shared on the social media pages of *National Geographic*, with a reach of 8 million.
- **Media coverage:** Notable coverage from recent press releases included the new Ebrington Hotel in Derry in *Global Traveler* magazine, which reached 300,000+.



Canada

- **Fill your heart with Ireland:** Tourism Ireland's campaign continues, incorporating new channels, with other tactics including programmatic display and social media advertising on Facebook, Instagram and Pinterest.
- **Media visits:** Tourism Ireland will invite *Montreal Gazette* (circulation 200,000+) writer Rochelle Lash to visit in September, focusing on luxury travel in Dublin and surrounding areas.
- **Media partnership:** Collaboration with specialty network Corus Entertainment which aired Tourism Ireland's messaging on HGTV Canada this summer to an audience of 5.3 million+.
- **European Travel Commission (ETC):** Tourism Ireland partnered with the ETC on a digital campaign to promote the island of Ireland, targeting audiences interested in travel to Europe, festivals and events, historical sites and nature and the outdoors. The campaign concluded in late July, delivering 5.1 million+ impressions (opportunities to see).
- **Events:** Tourism Ireland sponsored the Niagara Falls Irish Festival in August, with had an audience of 2,500 Canadians interested in Irish culture.
- **Business events:** Tourism Ireland attended events targeting a MICE audience in August, including the Canadian Meetings and Events Expo (CMEE) and the FICP Conference in Toronto, to identify opportunities in the sector and reconnect with event professionals interested in hosting island of Ireland-based programmes.
- **Luxury advisor familiarisation trip:** a luxury familiarisation trip will take place in September for 11 top-selling travel advisor members of the Travel Edge Network (50/50 split of attendees from Canada and USA), all with high revenue clients and who have not previously visited the island of Ireland.
- **Co-op marketing:** Tourism Ireland has partnered with Collette Vacations on a consumer campaign targeting off-peak travel, with ads on outdoor billboards, in print and on digital channels, to drive bookings for Q3 and Q4.



Australia

- **Women's FIFA World Cup:** Tourism Ireland ran an outdoor ad campaign in Sydney around the Australia-Ireland game, with ads strategically placed on main transport routes and around fan zones. Activity also included ads on mobile scooters around the stadium. A 10-minute Irish dancing performance took place in the main fan zone in Sydney, in front of 5,000 fans.
- **European Travel Commission:** Partnered with the ETC on a digital campaign to promote the island of Ireland, targeting travellers interested in events, outdoors, nature and festivals.
- **Trade webinar:** The first of a five-part webinar series on 'history and culture' took place in July, with four industry partners: Irish National Stud & Gardens, EPIC The Irish Emigration Museum, Shenanigans Walks Kilkenny and National Museums Northern Ireland.
- **Media coverage:** Two episodes of *Better Homes and Gardens*, featuring the island of Ireland, aired in August, with a combined viewership of 2.6 million. A series of articles about Northern Ireland ran in *The West Australian*, *Great Southern Chronicle* and the *Sunday Times* – written by journalist Steve McKenna who visited in 2022. Ashford Castle featured as having Ireland's 'Best Hotel Spa' in *Vacations and Travel* magazine.

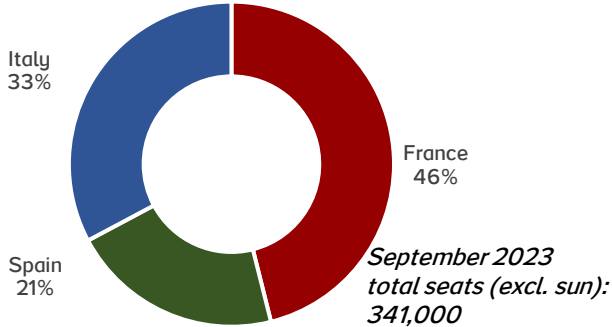


Southern Europe – France, Italy and Spain



Access update – Southern Europe

September 2023 France, Spain, Italy forecast seat capacity (excl. sun)



News

France:

- A new Aer Lingus service from Charles de Gaulle Paris to Shannon will commence in September this year. The service will run until January 2024, before taking a short break and recommencing in March 2024.
- Aer Lingus will operate a weekly Lyon to Cork service from December 2023 until the end of March 2024.

Italy:

- Ryanair will commence a winter flight from Turin to Belfast International Airport, from December 2023.

Market activity update

France

- **Co-op marketing:** a campaign with Stena Line, which included programmatic, online video, paid social and email marketing, was live this summer. A further campaign will commence in November, to drive bookings for 2024.
- **Networking event and presentation:** Tourism Ireland worked with the tour operator Slytours to showcase the island of Ireland to 45 decision-makers.
- **Luxury promotion:** Tourism Ireland hosted an event in Paris attended by 35 high end travel advisors/travel agents and eight media; 15 island of Ireland partners attended.
- **Partnership campaign:** launched in July with the operator Worldia (to 2,100 travel agents) to drive late summer bookings. Second burst is planned for November, to promote shoulder season bookings; activity will include a webinar for 80 travel agents.
- **Destination presentation:** with the tour operator Kuoni to 25 travel agents. Other activity included a communication to the travel trade in *Tourmag*, promoting the new Aer Lingus service from Paris to Shannon and the Wild Atlantic Way.
- **Business events:** MICE summer workshop in Paris was attended by 80 travel agents.
- **Festival Interceltique de Lorient:** Tourism Ireland had a stand with six industry partners – showcasing the island of Ireland’s culture and music.

Italy

- **Wild Atlantic Way:** Digital campaign – promoting travel to the island of Ireland from September onwards – delivered 66 million impressions (opportunities to see).
- **Co-op:** Campaign is live with Ryanair, promoting direct flights to Cork, Shannon and Knock from multiple Italian cities, at a price point of €29.99 for September onwards departures.
- **Industry digital marketing packages:** live for seven partners, giving visibility to industry offers; delivered 37,000 third-party referral business opportunities and enquiries to date.
- **Media visits:** Cycling influencer Pietro Franzese will travel in September along Wild Atlantic Way and Causeway Coastal Route. A group media visit to the West of Ireland, in collaboration with Enterprise Ireland and focusing on sustainability, will take place in October.
- **Golf:** Tourism Ireland will have a Golf in Ireland stand at the Ryder Cup in Rome; we will also organise an Irish night event in Rome for key Italian travel trade and media, as well as international media.

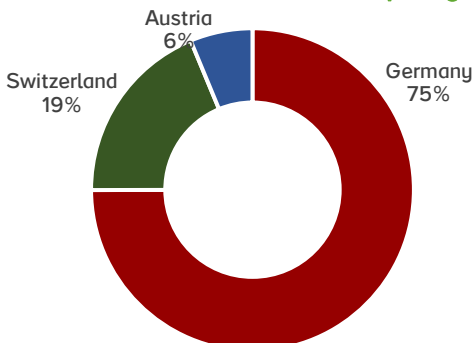
Spain

- **FYHWI:** A short breaks digital campaign with a targeted focus on Madrid, Barcelona and Northern Spain will go live in mid-September for eight weeks, driving awareness and promoting longer stays for this autumn and winter.
- **Bloomsday in Madrid:** our PR-led event generated major media coverage (+70 features) on TV, radio, online and print, reaching an audience of 13 million.
- **Co-operative campaigns:** with OTAs (online travel agents) Atrápalo and Logitravel will be activated on digital channels during September and October, to drive bookings for Q4.
- **Group literature media familiarisation trip:** journalists from leading Spanish cultural media outlets will visit Dublin, Sligo and Belfast, in September.
- **Trade roadshow:** Tourism Ireland and VisitBritain roadshow will visit A Coruña, Madrid, Bilbao and Barcelona; 15 industry partners will participate.



Access update

September 2023 Germany, Austria Switzerland forecast seat capacity



September 2023 total seats: 147,000

News

Germany:

- Direct air seat capacity from Germany to the island of Ireland for September 2023 is scheduled at 78% of September 2019 levels.

Market activity update

Germany

- **Fill your heart with Ireland:** phase 2 of our campaign went live in July on Facebook, Instagram and Pinterest. The campaign highlighted things to see and do during the off-season on the island of Ireland.
- **Uke Bosse campaign "Irland – eine Lovestory":** a partnership this summer with the German actor/comedian Uke Bosse was very successful on YouTube, reaching 1.6 million; We have included Uke Bosse in our 'always-on' activity, which is also performing strongly.
- **Picture This collaboration:** Tourism Ireland shared the music video of the new single 'Ireland' by Irish band Picture This, with our Fill your heart with Ireland branding, on our social channels. The post generated over 1.8 million impressions (opportunities to see), reached over 686,000 consumers and had 14,000 engagements on Facebook.
- **Familiarisation trip:** 15 travel agents from the German tourism foundation Willy Scharnow visited the Wild Atlantic Way in July.
- **Luxury promotion:** 18-page luxury feature on Ireland in a DERTOUR brochure in July.
- **Food and drink theme:** a podcast was released about Irish food and drink on 'Iss was, Hase!?' with famous German chef Cornelia Poletto and TV presenter Dennis Wilms. Also a 'Weltwach' podcast with Erik Lorenz which focused on Irish food and drink. We also engaged with 550 media contacts representing newspapers, lifestyle and special interest (food) magazines and web portals, to promote Irish food and drink.
- **Media visits:** 30 media trips between May and July for a range of media outlets, podcasters and influencers.



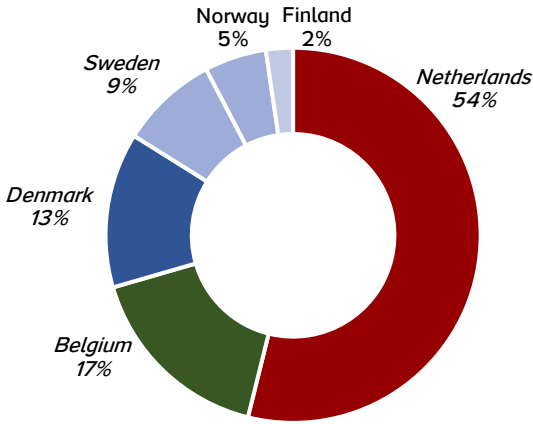
Austria and Switzerland

- **Fill your heart with Ireland:** 'always on' digital activity – paid content seeding and paid search – was live over the summer in Switzerland.
- **Co-op campaign:** The second burst of a campaign with Edelweiss, promoting its Zurich to Cork flight, ran in July on outdoor digital screens in Switzerland with a 'Leave Deadlines Love Coastlines' message.
- **Tour operator activity:** includes a hiking trip campaign with Baumeler Reisen to drive Q3 and Q4 trips, as well as Irish garden trips in 2024; a tour operator event with Hotelplan took place in August; and a competition with Golf & Travel at the OMEGA European Masters at the Crans-Sur-Sierre Golf Club.
- **Co-op campaign:** partnered with Expedia in Switzerland in August.
- **Publicity and media:** a culinary advertorial ran in *TravelMagazin* during the Zurich Food Festival. Two upcoming group press trips, from Austria and Switzerland, to Northern Ireland, in September.
- **B2B agency event** in Linz, Austria, with DERTOUR, which attracted 50+ travel agents; and a Corps Touristique event in July, attended by 100+ travel trade.



Access update

September 2023 Northern Europe to IOI forecast seat capacity



September 2023 total seats: 150,000

News

Nordics:

- Norwegian Air has acquired Widerøe Airlines, which operates a Bergen to Dublin service. Widerøe will, however, continue to exist as a separate company with its own brand.

Market activity update

Netherlands and Belgium

- **Fill your heart with Ireland:** A digital consumer campaign, aimed at promoting short breaks to the island of Ireland during the off-season, will go live in September. This campaign will highlight the benefits of off-season travel and take advantage of the year-round, direct air access from the Netherlands and Belgium.
- **Media partnerships:** will include a collaboration in September with five content creators to promote the Amsterdam to Cork flight for off-season travel.
- **Media visits:** upcoming visits include *Nouveau* and *Margriet*, both with a 100,000+ reach.
- **OTA promotions:** campaigns with Skyscanner and Cheaptickets will go live in mid-August and early September respectively. These will focus on promoting autumn travel to Cork and Dublin, emphasising the ease of access.
- **Co-op campaigns:** with BBI Travel and Buro Scanbrit are live, promoting off-season travel through online and offline platforms.
- **Workshop and networking:** events will be held in Belgium and Netherlands on 11 and 12 September, connecting 15 industry from the island of Ireland with 45 Dutch and Belgium travel professionals.

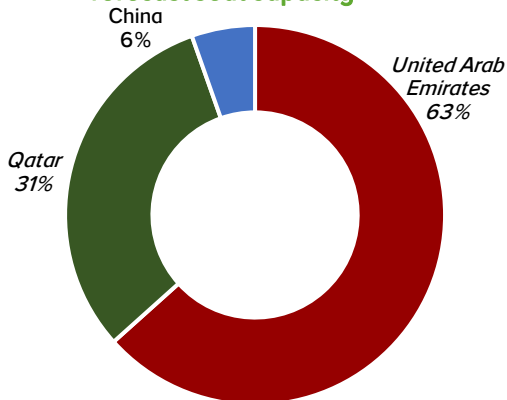
Nordics

- **Media event:** Tourism Ireland, in collaboration with Bord Bia, hosted a media and influencer event with Irish chef Jess Murphy, leveraging Stockholm's designation as European Capital of Gastronomy in 2023.
- **Podcast on 'Mythical Ireland':** was published by our Swedish celebrity ambassador Agneta Sjödin on her popular podcast channel, following her trip to Cork and Kerry.
- **Golf co-op activity:** currently live in Sweden promoting 'Golf In Ireland' with sports tour operator Here We Go.
- **Co-op activity:** with Danish Best Travel and Risskov Rejser, targeting potential Danish visitors for Q3 travel.
- **Fill your heart with Ireland:** 'always on' digital activity was live over the summer, with paid content seeding and paid search programmes.
- **'Whiskey Unveiled – The History and Resurgence of Irish Whiskey':** podcast was released this summer with Whiskey Island.
- **Media visits:** upcoming visits include *PRO Pensionären*, the main seniors magazine in Sweden (circulation 250,000 copies); and *Aftonbladet*, one of the largest daily newspapers in Sweden (429,000 circulation).



Access update

September 2023 Emerging Markets forecast seat capacity



September 2023 total seats: 49,000

News

Middle East:

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

China:

- Hainan Airline's direct flight from Beijing to Dublin is operating twice weekly, from 27 June until 8 October 2023.

Market activity update

Global Inbound

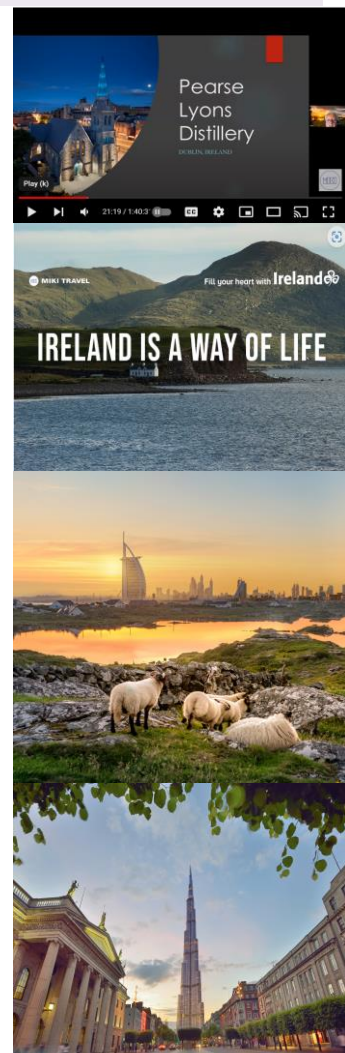
- **Webinar series:** hosted with Miki Travel attracted 800 travel agents from 15 countries across Asia.
- **Global partnership with Kuoni Tumlare:** a series of B2B communications and newsletters. The series highlighted a commitment to sustainable and luxury travel, which served as core themes throughout the collaboration.
- **Partnership with Miki Travel:** includes B2B communications, LinkedIn posts, as well as newsletters, with a theme of 'Iconic Ireland,' aiming to build awareness of the island of Ireland in Asia. The collaboration will run until the end of November.

Middle East

- **Digital art campaign:** marrying the landscapes of Dubai and the island of Ireland to promote visa-free travel for UAE nationals for the Eid break. Dubai International Airport, influencers, other well-known digital artists and the Irish expatriate community all shared and engaged, with positive feedback all round.
- **Fill your heart with Ireland influencer advocacy campaign:** influencers revisited their time on the island of Ireland and posted a memory of what filled their hearts during their visit. Each influencer posted a polaroid of their memory ahead of the Eid holiday. The campaign reached over 3 million people in the Middle East.
- **Media visit:** A familiarisation trip with El Al Airlines involved six key Israeli media visiting the island of Ireland and helped promote the recently launched direct flight to Dublin from Tel Aviv.

China

- **Group tours:** since 10 August, China is allowing outbound group tours to 138 countries, including Ireland and the UK.



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