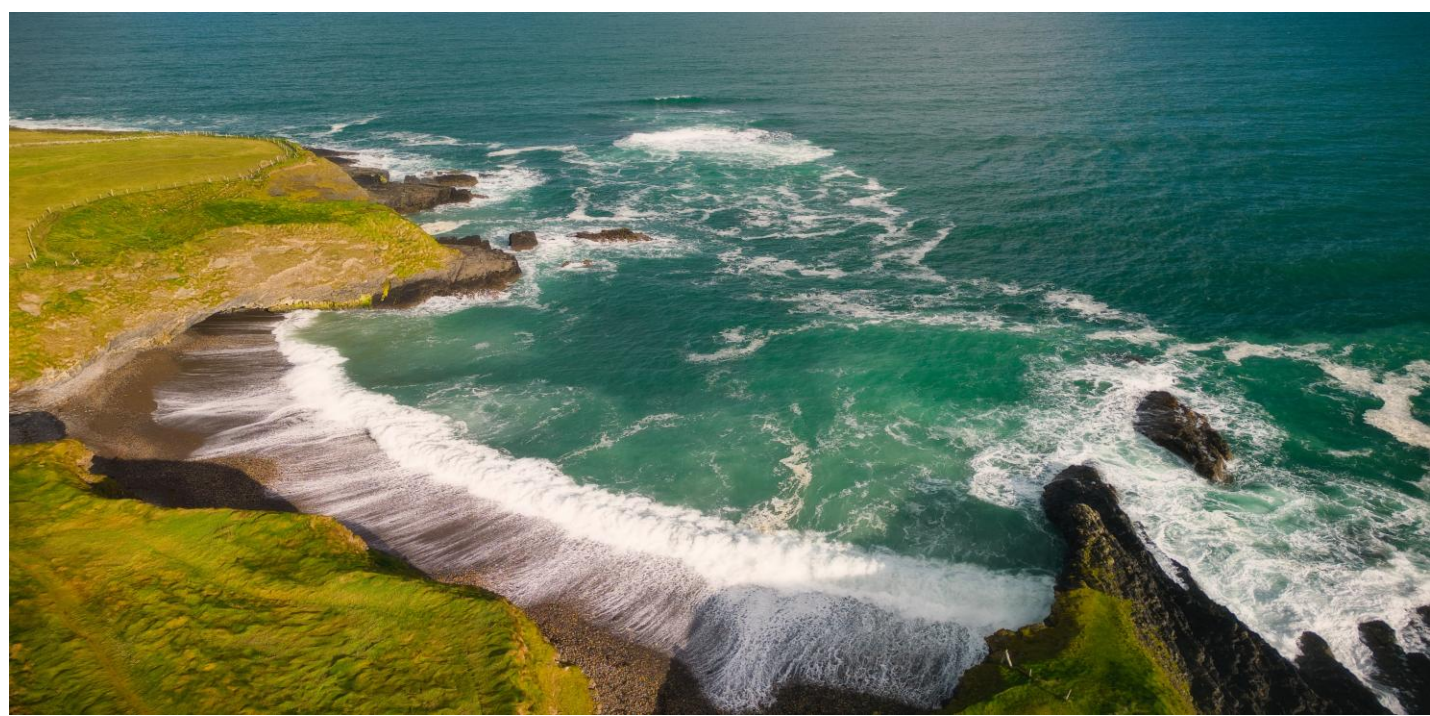


SOAR

(Situation & Outlook Analysis Report) September 2025



Aughris Head, County Sligo

HEADLINES

- Air seat capacity to the island of Ireland for the 2025 summer aviation season (end March to end October) is scheduled at +4% ahead of the same period last year, based on OAG filings. Indicators for the upcoming winter aviation season (end October until end March) are also positive. Current filings show seat capacity to the island of Ireland up +12% on last winter, with the outlook for both Ireland and Northern Ireland positive.
- CSO reports year to date, January to July, 3.47 million visitors have brought €2.86 billion to the economy, representing a softening in spend compared to 2024 and putting visitor numbers and spend in line with 2023 performance. NISRA will release Q1 2025 results for Northern Ireland next week.
- According to STR, average hotel occupancy levels on the island of Ireland for the first seven months of 2025 were on par with last year. AirDNA (which tracks the performance data of holiday rentals) reports that short-term rental occupancy was +1% for the same period.
- Tourism Ireland is rolling out major autumn and 'Home of Halloween' campaigns. Our 'Fill your heart with Ireland' off-season/short breaks campaigns are running in all key markets including Great Britain, the US, Germany, France, Canada, Australia, Spain, Italy, Belgium, the Netherlands and the Nordics. The campaign in GB, which includes advertising on TV, will generate 60 million quality opportunities to see (reach). In the US, an extensive campaign will deliver an estimated 67+ million quality opportunities to see.
- As seasons change and autumn travel is now in focus, Tourism Ireland is promoting Halloween as an iconic reason to visit the island of Ireland in autumn. Phase one of the campaign is live and running in GB, the US, Canada, France and Germany.
- Tourism Ireland's extensive publicity drive continues, targeting print, broadcast and online media and content creators in all our key markets. We continue to pitch lots of positive stories about the island of Ireland to international media and invite influential travel, culture, and lifestyle journalists to visit.

Economic consequences of tariffs are becoming evident and pose substantial risks to growth. Oxford Economics expects world GDP to expand by +2.6% this year. It has raised its forecast for this year by +0.1 percentage point because activity has been boosted by firms trying to frontload orders ahead of tariff deadlines. However, it expects quarterly GDP growth rates will slow in the second half of 2025 and has lowered its GDP growth forecast for next year marginally to +2.4%. Below is a summary of the economic outlook in our top four source markets.

Source: Oxford Economics



Key Source Markets

Great Britain



Oxford Economics has raised its forecast for GDP growth this year to +1.3%, due to a stronger-than-expected Q2. Domestically, the lagged impact of past interest rate hikes continues to emerge and fiscal policy is being tightened. This year's US tariff announcements have added to the headwinds and it expects the underlying pace of growth to remain sluggish.

Economic Outlook 2025 Forecast

% change 2025 vs. 2024



GDP
+1.3%



Consumer Prices
+3.4%

Exchange rate

Sep '24 £1 : €1.19 Sep '25 £1 : €1.15

US



Ongoing tariff changes, announced by the US Administration, have created uncertainty about the US economic outlook. According to Oxford Economics, the economy will likely weaken in the second half of this year, but should improve next year due to deregulation, fiscal stimulus and less policy uncertainty. Oxford Economics forecasts GDP growth of +1.7% in 2025.

Economic Outlook 2025 Forecast

% change 2025 vs. 2024



GDP
+1.7%



Consumer Prices
+2.9%

Exchange rate

Sep '24 \$1 : €0.90 Sep '25 \$1 : €0.86 Sep '24 \$1 : £0.76 Sep '25 \$1 : £0.75

France



Oxford Economics has upgraded its forecast for 2025 GDP growth in France marginally to +0.6%, due to a better-than-expected Q2. In 2026, Oxford Economics forecasts GDP growth will increase only marginally to +0.7%, as domestic uncertainty is likely to continue to discourage economic activity.

Economic Outlook 2025 Forecast

% change 2025 vs. 2024



GDP
+0.6%



Consumer Prices
+1.1%

Exchange rate

Sep '24 €1 : £0.84 Sep '25 €1 : £0.87

Germany



The outlook for the rest of the year remains broadly unchanged. Oxford Economics expects GDP to stagnate in the second half of the year and forecasts 2025 GDP growth of just +0.3%. Oxford Economics forecasts growth to gradually pick up through next year, as the fiscal easing gains traction and trade uncertainty fades.

Economic Outlook 2025 Forecast

% change 2025 vs. 2024



GDP
+0.3%



Consumer Prices
+2.0%

Exchange rate

Sep '24 €1 : £0.84 Sep '25 €1 : £0.87

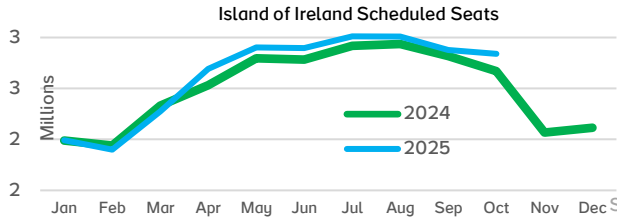
Island of Ireland Access and Accommodation Situation



Air Access Seat Capacity – Summer Aviation Season 2025*



Island of Ireland summer* seats
19.9m
+4%

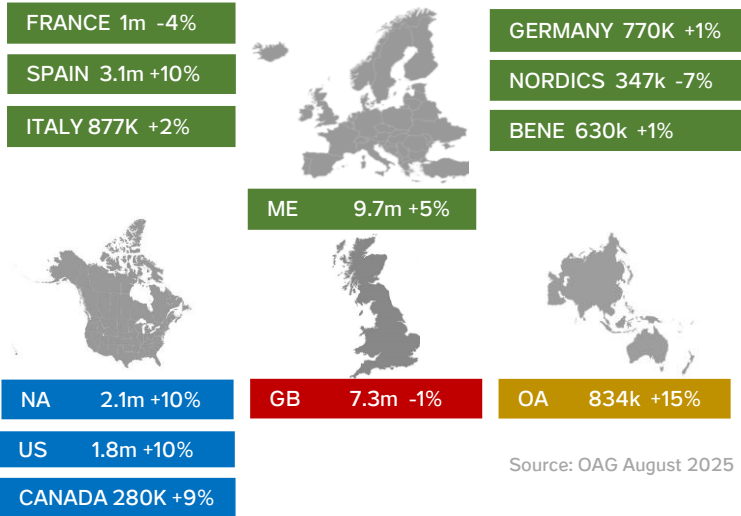


*The summer aviation season runs from the end of March to the end of October.

Source: OAG August 2025

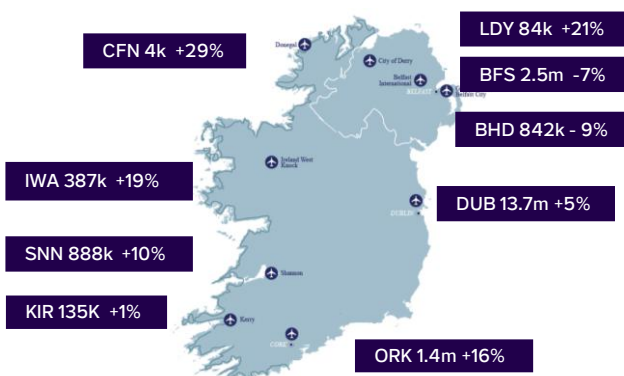
Scheduled seat capacity to the island of Ireland for the summer aviation season* is filed at +4% ahead of the same period last year. Ireland is filed at +6% above last summer's levels. Northern Ireland is scheduled at -7%, primarily due to fewer seats on offer from easyJet.

Market Area Air Seat Capacity (000's) & % change summer aviation season 2025 vs. 2024



Source: OAG August 2025

Airport overseas seat capacity (000's) & % change summer aviation season 2025 vs. 2024

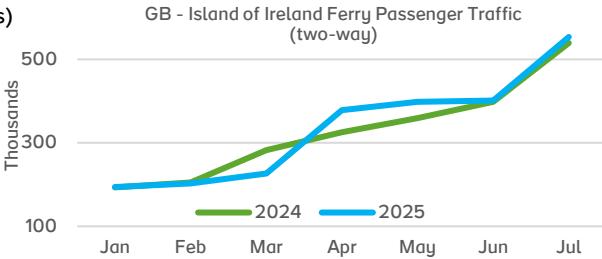
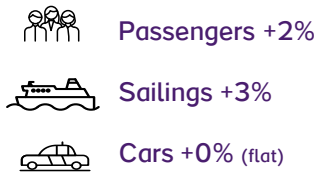


LDY = City of Derry, BFS = Belfast Int., BHD = Belfast City, DUB = Dublin, ORK = Cork, KIR = Kerry, SNN = Shannon, NOC = Ireland West, CFN = Donegal

OAG's scheduled air seat capacity to the island of Ireland from North America (+10%), Mainland Europe (+5%) and Other Areas (+15%) is ahead of last summer's aviation season levels. Seat capacity on routes of significant inbound potential from Mainland Europe is similar to last summer. Seat capacity from GB (-1%) is just below the 2024 season. Indicators for the upcoming winter aviation season, commencing at the end of October, are also positive. Current filings show total seat capacity to the island of Ireland up +12% compared with last winter.

Ferry Performance – January to July 2025

GB – island of Ireland ferry
% change 2025 vs. 2024 (both ways)



Ferry passenger numbers on GB routes to and from the island of Ireland for the first seven months of 2025 were +2% ahead of 2024 levels. Note: performance data from France and Spain is not currently available.

Accommodation Performance – January to July 2025



Hotels (STR)
OCC +0% ADR +2%



Short-term rental (AirDNA)
OCC +1% ADR +4%

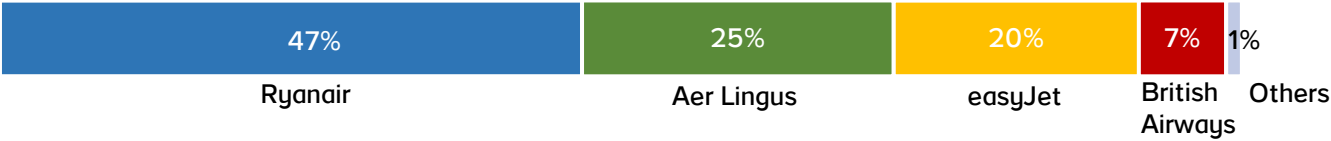
OCC = Occupancy ADR = Average Daily Rate
Data includes residents from both overseas and the island of Ireland.

According to STR, average hotel occupancy levels on the island of Ireland for the first seven months of 2025 were on par with last year. AirDNA reports that short-term rental occupancy was +1% for the same period.

Access update

GB to island of Ireland 2025 summer aviation season
forecast seat capacity

Summer 2025 total seats: 7.3 million



News

- Air access remains positive from Britain, with direct flights from 23 gateways.
- Aer Lingus Regional, operated by Emerald Airlines, will increase its flights from East Midlands Airport to Belfast from three to seven a week from October 25 this year.

Market activity update

Inspiring Visitors

- **Fill your heart with Ireland campaign:** our campaign is live this September and October on TV, BVOD (broadcast video on demand), SVOD (subscription video on demand), social and digital, generating 60 million quality opportunities to see (reach).
- **Dermot's Taste of Ireland:** Dermot O'Leary is back on the island of Ireland this autumn, filming for a second series of *Dermot's Taste of Ireland*. Co-produced by Tourism Ireland and delivering Shared Island objectives in connecting the North West of the island, the series will feature the Causeway Coastal Route and the Wild Atlantic Way. It will be seen by millions of people across Britain when it airs on ITV in spring 2026.
- **The Open:** an extensive publicity campaign showcasing Northern Ireland generated almost 35 million opportunities to see (reach), including eight live broadcast opportunities, 56 pieces of print / online coverage, 21 media visits and one content creator partnership. Highlights included BBC Breakfast's Mike Bushell presenting from the Causeway Coastal Route, as well as coverage in the *Financial Times*.
- **Golf in Ireland:** a new-20 second ad voiced by Paul McGinley aired on TV, BVOD and YouTube to coincide with The Open, reaching a golf audience of 5 million.
- **Group press trip – rail and sail:** supported by Irish Ferries, four journalists – representing *The Sun*, *National World* and *The I* – visited Dublin, Cork and Cobh in August (total opportunities to see, or reach, of 2.1 million).

Strengthening Partnerships

- **Taste of Ireland event:** took place in Glasgow in August, connecting leading Scottish tour operators with six island of Ireland industry partners via the Tourism Ireland 'Animation Programme', which supports emerging and unique product experiences.
- **Co-operative campaigns:** recent activity has included co-operation with Ryanair to promote regional routes to Cork, Kerry, Knock and Shannon; and a Loganair campaign promoting Glasgow to Donegal. Phase two of our Skyscanner and Kayak partnerships went live in August.
- **Ireland luxury showcase:** 15 leading GB-based luxury agents and tour operators met and did business with 15 luxury industry partners from the island of Ireland for a one-day workshop in early September.
- **Golf in Ireland events:** highlights include promoting our world-class golf and the 2027 Ryder Cup at Adare Manor at the British Masters at The Belfry (circa. 60,000 spectators) in August and the BMW PGA Wentworth (circa 125,000 spectators) in September. Killarney Heights Hotel, Druids Glen and Causeway Hotel partnered with us at The Belfry, while at Wentworth we were joined by Druids Glen, Green Golf Ball, Harvey's Point and St Patrick's Golf Club in Downpatrick.



Access update

North America to island of Ireland 2025 summer aviation season forecast seat capacity

Summer 2025 total seats 2.1 million



News

United States

- Air access remains positive from the United States, with direct flights from 21 gateways. Aer Lingus will resume Las Vegas to Dublin flights on 25 October.

Canada

- Air access remains strong from Canada, following the introduction of a new gateway from St Johns, resulting in just over 10,000 weekly one-way seats available from across Canada to Dublin.
- An Air Canada strike on 16-19 August affected upwards of 1,600 passengers to Dublin, many of whom were re-routed via other carriers.

Market activity update – United States

Inspiring Visitors

- Fill your heart with Ireland campaign:** the second phase of this year's TV campaign was live in July and August, supported by ads on Connected TV, social media and digital, as well as a partnership with Amazon Prime, delivering an estimated 58 million quality opportunities to see (reach).
- GoPro brand partnership:** seven GoPro Ambassadors visited Ireland, bringing the island to life through their social content, editorial features, dedicated landing pages and a soon-to-launch paid campaign. Coverage on owned channels has delivered a reach of over 18 million.
- The Open:** TV ads aired on NBC in nine key US areas during the tournament, supported by ads on Connected TV, that delivered 1 million quality opportunities to see on golf programming in the week leading up to The Open.
- Media visits:** eight leading US golf journalists experienced some of the courses in the North West, on a post-Open visit. Outlets included WFAN Radio, Global Golf Post and CBS Radio, with a collective reach of over 2 million.
- Outdoor and adventure:** six leading US outdoor and adventure writers recently visited the island of Ireland, including contributors to *The Denver Post*, *Runner's World*, *Washington Post*, *Business Insider*, *National Geographic*, *Fodor's* and *Jetsetter*. Highlights included mountain biking in Wicklow, caving and climbing in Fermanagh and surfing at Benone Strand.
- Aer Lingus College Football Classic:** the game at the Aviva Stadium attracted almost 23,000 US visitors and generated an economic impact estimated at €130 million. Dedicated commercials and destination features aired on ESPN during the game broadcast, reaching an additional estimated 4.5 million viewers.

Strengthening Partnerships

- IAGTO Annual North American Golf Tourism Convention:** 12 industry partners from the island of Ireland attended this event in Alabama. Our participation included sponsorships, including sponsorship of the Golf Day, which offered partners access to 60 buyers, with 550 B2B meetings taking place.
- Third party travel trade events:** Tourism Ireland participated in GTM Marketplace, GTM West and Virtuoso Travel Week, to highlight the island of Ireland to influential travel advisors across both the mid-tier and luxury segments. Together, over 2,300 B2B meetings took place between US travel advisors and 20 partners from the island of Ireland.
- Milwaukee Irish Festival:** the largest Irish cultural event in the US, drawing 130,000+ attendees, provided a valuable platform to promote the island of Ireland as a premier holiday destination. This year, in collaboration with Fáilte Ireland, Ireland's unique position as the Home of Halloween was highlighted.
- Webinars:** an extensive programme of destination educational activity for our key travel trade audience continues; 1,600+ travel advisors have participated to date this year.



Market activity update

Canada

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign continues across Netflix, Prime, Facebook and Instagram, creating over 67 million quality opportunities to see (reach) year to date.
- **Media visits:** Tourism Ireland invited *Canadian Geographic* to visit the North West and Northern Ireland, showcasing some of our iconic attractions including the Causeway Coastal Route and Titanic Belfast, as well as hidden gems such as regional distilleries and sheepdog trials. The resulting feature will reach 2.7+ million readers in Canada. A second article focusing on culture and castles is due to be published in December.

Strengthening Partnerships

- **Golf:** a dedicated e-blast highlighting The Open in Royal Portrush and Golf in Ireland was issued by *Travelweek* alongside social media posts highlighting the island of Ireland as a must-visit golf destination, reaching 15,000+ advisors. Tourism Ireland also hosted a booth at the Association of Canadian Travel Agents (ACTA) golf tournament connecting with 200+ travel trade.
- **Niagara Irish Festival:** Tourism Ireland will have a booth at the third annual Niagara Irish Festival, in partnership with Royal Irish Tours; interviews about Ireland will take place on local radio stations and CHCH-TV.

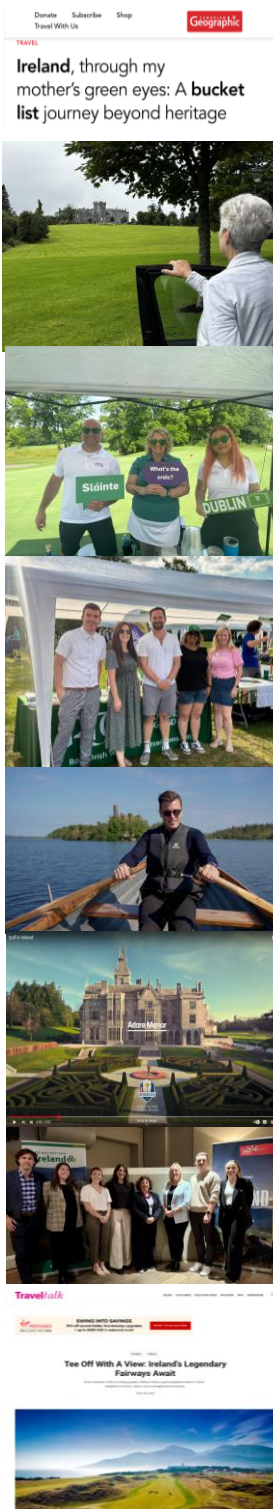
Australia

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** a second burst of our campaign is live in Australia and New Zealand and is expected to generate over 15 million quality opportunities to see.
- **Publicity:** Leitrim, Sligo and Down all featured in three episodes of *The Great Outdoors* on Channel 7, reaching an audience of over 1 million per episode in July and August.
- **Golf In Ireland:** a digital golf campaign ran on YouTube, promoting our world-class golf and the Ryder Cup in 2027. The campaign created over 600,000 quality opportunities to see.

Strengthening Partnerships

- **The British and Irish Lions networking watch event:** to capitalise on the Lions Tour, Tourism Ireland collaborated with VisitBritain in Sydney to host an event for 50 trade and media partners. The event featured business updates, Irish themed food and drink and a joint destination trivia.
- **Webinar series:** the last of three travel trade webinars hosted by Destination Webinars took place in late July, involving three island of Ireland partners presenting on the topic 'luxury stays and hidden treasures'.
- **Trade media:** a dedicated newsletter featuring The Open and golf in Ireland was sent by *Travel Weekly* (to 10,897 subscribers); and an article on The Open and golf in Ireland was published by *TravelTalk* (travel trade magazine) and promoted in its newsletter (to 15,274 subscribers).



Southern Europe – France, Italy and Spain



Access update – Southern Europe

France, Italy, Spain to island of Ireland 2025 summer aviation season forecast seat capacity (excl. sun)

Summer 2025 seats (excl. sun): 2.4 million

42%

France

35%

Italy

23%

Spain

News

France:

- Brittany Ferries will increase its Cherbourg to Rosslare service to daily departures (up from five per week) from October. This expansion follows Stena Line's withdrawal from the route at the end of September.

Italy:

- Aer Lingus will operate a new winter route from Turin to Dublin, from December 2025 to March 2026.

Spain:

- Ryanair will commence a new winter service from Madrid to Shannon, from the end of October to March 2026.

Market activity update

France

Inspiring Visitors

- **Fill your heart with Ireland campaign:** an off-season short breaks campaign is live on Facebook, Instagram, YouTube and FranceTV, promoting trips to Dublin, Cork, Belfast, Galway and their surroundings. The campaign will generate over 25 million quality opportunities to see (reach).

Strengthening Partnerships:

- **Partnerships and co-op:** activity includes a campaign with PerfectStay (tour operator) on Air France Holidays, as well as ongoing campaigns with Brittany Ferries, Skyscanner and Voyage Privé, highlighting regional access to drive bookings for Q3 and Q4.
- **Business events:** activity includes our participation in a workshop with Partance this summer, to promote the island of Ireland for Business Events to 72 attendees; and a MICE familiarisation trip in September, with 10 project managers visiting Dublin and Belfast.
- **IFTM Top Resa:** the annual French travel and tourism trade show will take place at the end of September, with 16 island of industry partners taking part in 700+ commercial meetings over three days.

Italy

Inspiring Visitors:

- **Golf promotion:** activity includes targeting members of leading golf courses in northern Italy and a social media, digital and TV campaign on Sky Sports during the Masters, The Open and the upcoming Ryder Cup.
- **Fill your heart with Ireland campaign:** our off-season/short breaks campaign is live on Instagram, Facebook and YouTube, targeting Italians to visit Dublin, Cork, Belfast, Galway and their surroundings in the latter part of the year. Expected reach of over 10 million and over 45 million impressions.

Strengthening Partnerships:

- **Co-op campaigns:** activity is live with Ryanair and Skyscanner to drive autumn travel and bookings on flights from Italy to Cork, Shannon and Ireland West Airport.
- **Italy Irlanda expert webinar series:** continues this September with a webinar dedicated to unique experiences for groups.

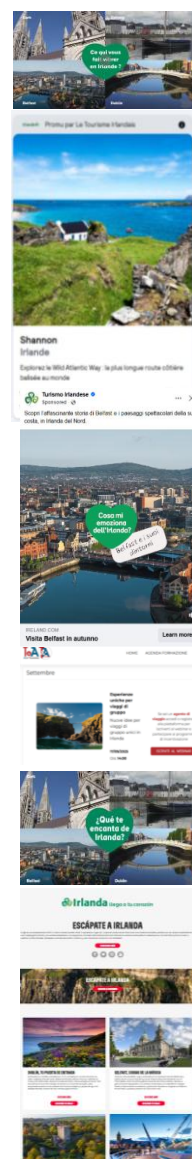
Spain

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** the campaign will run from mid-September for four weeks on Facebook, Instagram, YouTube and online video, targeting audiences in Madrid and Barcelona. It will highlight direct flights to Belfast, Dublin, Cork and Shannon for the autumn/winter season, with an anticipated reach of over 48 million impressions.
- **Content creator trip:** TravelTipForYou will visit Dublin and Belfast in September, creating urban-focused content for an audience of over 750,000.

Strengthening Partnerships:

- **OTA co-op:** a campaign with Atrápalo this autumn is expected to deliver more than 27 million impressions via digital display, radio and owned channels.
- **Trade roadshow:** Tourism Ireland, together with VisitBritain and 15 industry partners from Ireland, will visit Bilbao, Madrid and Barcelona in October, connecting with 200+ trade contacts.



Access update

Germany, Switzerland, Austria to island of Ireland 2025 summer aviation season forecast seat capacity

Summer 2025 total seats: 1.1 million



News

Germany:

- Discover Airlines, a subsidiary of the Lufthansa Group, will launch a new, twice-weekly service from Frankfurt to Shannon for the 2026 summer season.

Market activity update

Germany

Inspiring Visitors:

- Activities campaign:** our Fill your heart with Ireland activities campaign ran this summer, generating nearly 23 million impressions. A highlight was our collaboration with Jonas Deichmann (adventurer and extreme cyclist) and Komoot (outdoor adventure platform) to promote cycling routes on the island of Ireland. Our Fill your heart with Ireland off-season/short breaks campaign kicked off in September.
- 'Uke Bosse' campaign:** the third phase of our award-winning 'Uke Bosse' campaign featured German actor Axel Prahl and highlighted boating and Ireland's Ancient East, generating over 1.7 million views on YouTube.
- Golf campaign:** a digital golf campaign featuring German golfer Marcel Siem and some of his favourite places on the island of Ireland generated nearly 1 million impressions. Building on this, Tourism Ireland launched a social campaign with a special competition offering consumers the chance to win a trip to the island of Ireland.
- Co-op campaigns:** current activity includes a new co-op campaign with KLM to promote Cork as a winter destination from Germany. A dedicated campaign for Belfast is also live.

Strengthening Partnerships:

- Business Events:** this summer, a Business Events roadshow involved evening events in Düsseldorf and Munich, with 550 meetings taking place.
- Partnership activity:** Tourism Ireland, in collaboration with Ireland West Airport, hosted a networking event in Bonn this summer. Around 825 commercial meetings took place between 23 island of Ireland industry partners and 33 German travel agents.
- Golf familiarisation visit:** seven DERPART travel agents participated in a golf familiarisation trip, visiting Dublin, Kildare, Wicklow and Kilkenny.

Austria and Switzerland

Inspiring Visitors:

- Falstaff Travel:** following an earlier media visit, the Falstaff Travel 'Ireland Special' is available since mid-August in all three German-speaking markets.
- Co-op activity:** in Switzerland, Tourism Ireland partnered with Edelweiss to promote its direct flight to Cork.
- Broadcast:** Switzerland's national broadcaster (SRF) dedicated an evening of programming to Ireland, showcasing its spectacular beauty; the content remains available on demand until mid-September.



Access update

Northern Europe to island of Ireland 2025 summer aviation season forecast seat capacity

Summer 2025 total seats: 1.1 million



News

Nordics:

- Ryanair will increase its Stockholm to Dublin service from two to four weekly flights from the end of October.
- Aer Lingus will launch a new twice-weekly service from Tromsø to Dublin from December.
- Ryanair will operate a new twice-weekly service from Rovaniemi in Finland to Shannon from October.
- easyJet will launch a flight from Rovaniemi to Belfast in December.

Market activity update

The Netherlands and Belgium

Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our autumn campaign kicked off in August and will run for six weeks on YouTube, Facebook and Instagram in the Netherlands and Belgium.
- **Belfast campaign:** a dedicated campaign in October will promote Belfast as a fantastic city break destination, highlighting ease of access on direct flights from Amsterdam. This campaign will run on Facebook and Instagram. A popular content creator – AuthenticChica (213,000 followers on Instagram) – travelled to Belfast and the Causeway Coast at the end of August; her content will go live in October, amplifying the reach and impact of our campaign.
- **Culinary TV show:** in September, a culinary TV show called *Hugo maakt Kennis* will air on Disney+ and on 24Kitchen (food and cooking channel). The six-episode series will showcase food, culture and history in Dublin, Cork, Doolin, Lahinch and Galway and will reach an average of 1.1 million viewers per episode.

Strengthening Partnerships:

- **Skyscanner partnership:** Tourism Ireland has partnered with Skyscanner until the end of September in the Netherlands and Belgium, to highlight ease of access on direct flights to Dublin, Cork and Belfast (the Netherlands only).
- **Carrier co-op:** co-operative campaigns with KLM and easyJet, promoting direct flights to Belfast, will roll out across multiple channels in Q4.

Nordics

Inspiring Visitors:

- **Slow travel:** a new campaign with one of Sweden's best-loved broadcasters Agneta Sjödin will roll out over the next 18 months. The campaign will highlight slow travel in Northern Ireland and is expected to deliver 1.17 million quality opportunities to see on Facebook and Instagram. Throughout 2025 and 2026, Agneta will also share island of Ireland content with her audience of around 300,000.
- **Off-season campaign:** a campaign promoting off-season travel and highlighting some of our cities is rolling out in Denmark and Sweden. It involves four leading content creators sharing their experiences of Belfast, Cork and Dublin with their combined audience of almost 450,000. Their content, which features hidden gems and food experiences, will be amplified in a paid campaign on Facebook and Instagram, which will reach almost 6 million.

Strengthening Partnerships:

- **Golf:** co-op activity with NordicGolfers.com, Out of Bounds and HereWeGoGolf is live, driving bookings for golf holidays; a campaign on the pan-Nordic app Golf GameBook drove 15,000+ clicks to the Northern Ireland pages on Ireland.com. Three Nordic tour operators took part in a golf familiarisation trip to Northern Ireland in late August.



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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This report has been produced with available data up until 2nd September 2025. Every effort has been made to ensure all data is accurate; however, Tourism Ireland does not take responsibility for any errors or omissions. If quoting from SOAR, please reference both Tourism Ireland and the original source of the information.