

# SOAR

## (Situation & Outlook Analysis Report)

December 2024




The global economy is projected to remain resilient despite significant challenges, according to [latest Economic Outlook](#) from the Organisation for Economic Co-operation and Development (OECD). The OECD forecasts global GDP growth of +3.3% in 2025, up from +3.2% in 2024. Inflation is expected to ease further, supported by the still restrictive stance of monetary policy in many countries. Headline inflation has already returned to central bank targets in nearly half of advanced economies.


Unemployment remains low by historical standards and strong nominal wage gains and continued disinflation have bolstered real household incomes. However, private consumption growth remains subdued in most countries, reflecting weak consumer confidence.



Scheduled seat capacity to the island of Ireland for winter 2024/25 sits at 99% of last winter's levels, based on OAG filings. While regional and Northern Ireland airports are showing strong growth, Dublin – as the largest airport – has 96% of the seat capacity it had in winter 2023/24, due to the airport cap applied this winter. While there is a 'hold' for legal consideration of the airport cap for summer 2025, there is still impact from applying the cap this winter. Island wide, air seat capacity for this winter from Great Britain has dipped to 97% the level of 2023/24 and from North America to 96% of the level of 2023/24.



The Central Statistics Office (CSO) has released inbound tourism statistics for Ireland for the first ten months of 2024. From January to October 2024, overseas tourists generated €5.38 billion for the economy, a +15% increase on the same period in 2023. Close to 5.8 million overseas tourists visited Ireland, an +8% increase year on year. These overseas tourists stayed almost 43 million nights, down -2%. The average length of stay was 7.4 nights, which is down slightly. While revenue growth is positive, industry challenges include increased costs and changes to spread of visitors, based on length of stay and accommodation availability.



According to UN Tourism's latest [World Tourism Barometer](#), an estimated 1.1 billion tourists travelled internationally in the first nine months of 2024. This was +11% more than in the same period of 2023. The growth was driven by strong demand in Europe and robust performance from large source markets globally. Increased air connectivity and visa facilitation also supported international travel. However, several economic, geopolitical and climate challenges remain. The tourism sector is still facing inflation in travel and tourism, namely high transport and accommodation prices, as well as volatile oil prices. Major conflicts and tensions around the world continue to impact consumer confidence, while extreme weather events and staff shortages are also critical challenges for global tourism performance.



Tourism Ireland's extensive, highly targeted programme of promotions around the world continues. This winter, we are promoting reasons to explore across seasons, we have publicity programmes under way across 13 markets, and we'll be rolling out kickstart campaigns across TV and digital channels to inspire potential holidaymakers to come and explore the island of Ireland in 2025. December is typically a key month for people to begin considering their main holiday for the year ahead and we will be supporting the tourism industry to win hearts, minds and trips.

## 2024 Forecast Economic Outlook trended by month

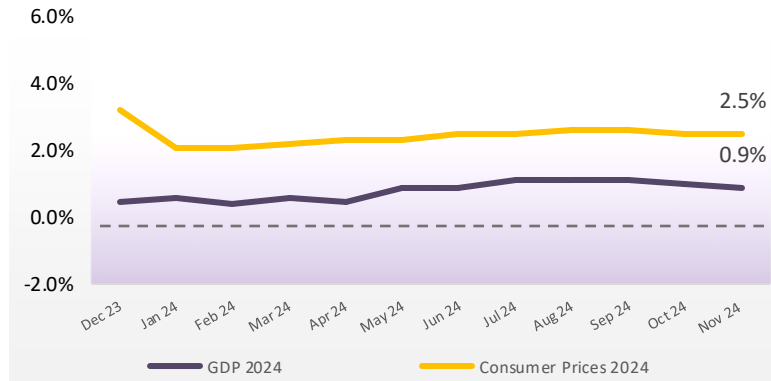
Source: Oxford Economics

### Great Britain

Oxford Economics forecasts GDP growth for the UK of +1.4% in 2025. It is expected that there may be weaker consumer spending and business investment, but this will be offset by a government spending boost due to an increase in employers' national insurance contributions. However, higher labour costs will likely result in weaker wage growth and lower profitability.

#### Exchange rate

Dec '23 £1 : €1.16    Dec '24 £1 : €1.21

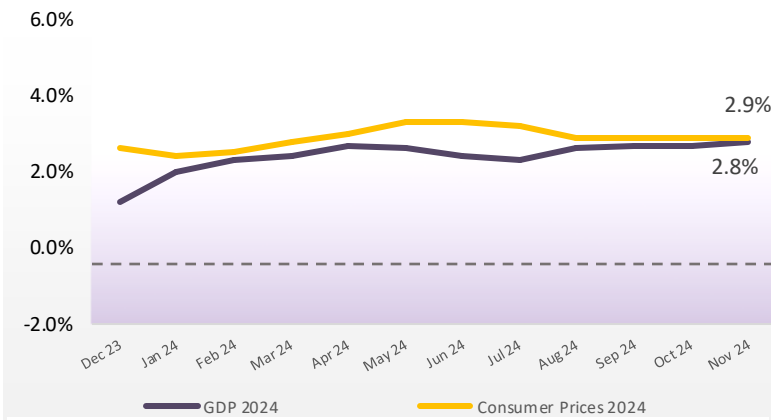


### US

Following the US elections, Oxford Economics expects the Republican-led Congress to extend personal tax cuts and enable higher spending. It predicts that Donald Trump will use his presidential powers to reduce immigration and impose targeted tariffs. However, the outlook for 2025 will not change appreciably in the near term because it will take time for changes in fiscal, trade and immigration policy to be implemented and impact the economy.

#### Exchange rate

Dec '23 \$1 : €0.93    Dec '24 \$1 : €0.95  
Dec '23 \$1 : £0.79    Dec '24 \$1 : £0.79

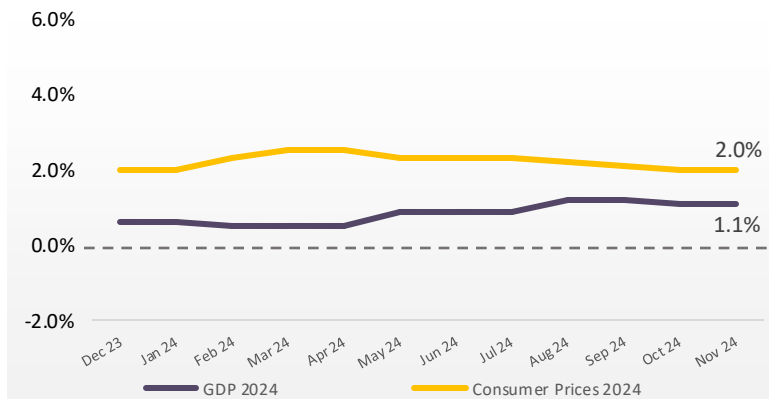


### France

Oxford Economics has left its GDP growth forecast for France unchanged at +1.1% for 2024. Consumer and business sentiment has darkened considerably due to domestic political uncertainty and the likelihood of additional taxes on businesses has increased. The result of the US elections has increased uncertainties, although France isn't among the economies most exposed to trade tensions.

#### Exchange rate

Dec '23 €1 : £0.86    Dec '24 €1 : £0.83

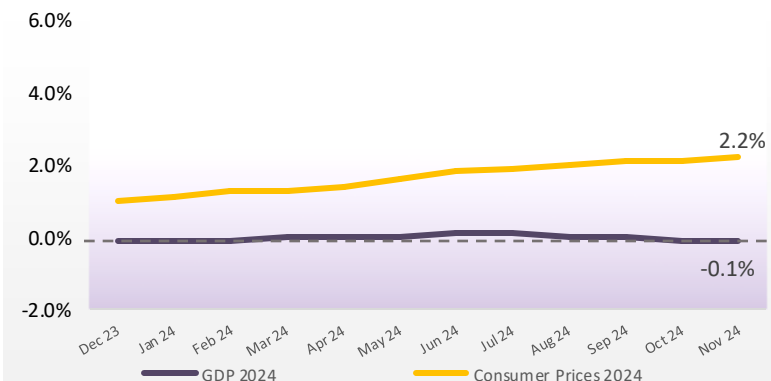


### Germany

The economy is struggling to gain any momentum, with economic data releases continuing to disappoint. However, recent surveys indicated tentative signs of stabilisation. Retail sales grew +1.2% on the quarter and car sales and consumer sentiment also rose in October. Oxford Economics expects that potential tariffs and increased geopolitical uncertainty may pose challenges for Germany's export-heavy economy.

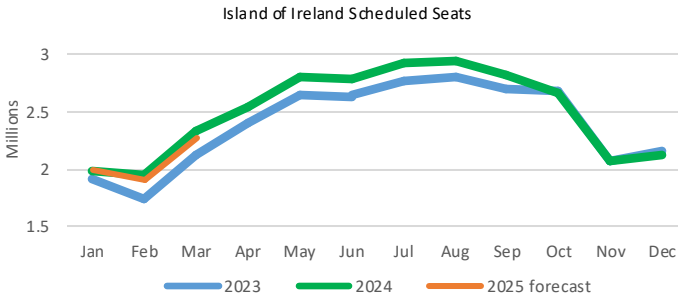
#### Exchange rate

Dec '23 €1 : £0.86    Dec '24 €1 : £0.83



# Island of Ireland Access Situation

## OAG Scheduled Seat Capacity Winter\* 2024/25



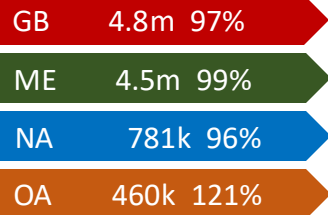
Based on OAG filings, scheduled seat capacity to the island of Ireland for this winter sits at 99% of last winter's levels.

Air seat capacity to Ireland is forecast at 98% of last winter's levels, with Northern Ireland scheduled at 103%, which is principally due to more seats from Mainland Europe.

Seat capacity to the island of Ireland for winter 2024/25 is scheduled at 99% of the level it was last winter season.

## Air Access winter 2024/25 – % share of winter 2023/24

### IOI Seat Capacity



**IOI seats**  
10.5m  
99%

Flights 99%  
Airports 94%  
Airlines 100%

OAG's scheduled air seat capacity from GB (97%), Mainland Europe (99%) and North America (96%) to the island of Ireland is marginally behind last winter's levels. Seat capacity from Other Areas (121%) is above last winter, driven by sun routes.

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

Source: OAG 27 November

## Airport Seat Capacity Forecast – Winter 2024/25

According to OAG, Dublin Airport (96%) is the only airport with fewer seats scheduled for this winter than last winter. The Dublin Airport passenger cap is impacting seat capacity this winter season. Cork Airport and Shannon Airport are both scheduled at 106% of last winter's levels. Kerry and Knock are filed at 111% and 107% respectively and Donegal has overseas seats this winter.

Belfast City Airport and Belfast International Airport are filed at 103% and 101% respectively of winter 2023/24 levels. City of Derry Airport is filed at 193%.

Airports	Winter 2023/24 seats	Winter 2024/25 seats	24/25 % share of 23/24
Belfast Intl.	1,475,335	1,491,796	101%
Belfast City	631,885	648,124	103%
City of Derry	32,634	62,856	193%
Dublin	7,239,989	6,976,538	96%
Cork	631,584	672,564	106%
Shannon	401,177	425,323	106%
Knock	182,664	195,644	107%
Kerry	51,853	57,360	111%
Donegal	0	2,136	N/A
<b>Total</b>	<b>10,647,121</b>	<b>10,532,341</b>	<b>99%</b>

## Ferry Performance – January - October 2024

Data for the first ten months of 2024 confirms ferry passenger numbers on GB routes to and from the island of Ireland at 96% of January-October 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-October 2023	January-October 2024	2024 % share of 2023
<b>GB – island of Ireland</b>			
Sailings	16,283	15,133	93%
Passengers	3,705,125	3,561,966	96%
Cars	1,078,376	1,029,304	95%

Ferry Passenger Traffic	January-Oct 2024 % share of January-Oct 2023
Northern Ireland	98%
Ireland	95%
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) have released inbound tourism statistics for Ireland for the first ten months of 2024. Percentage and volume changes in the tables below compare January to October 2024 with the same period in 2023.

### YTD: CSO Inbound Tourism Ireland (Direct) January – October 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	1,090	+11%	2,094	+5%	10,281	-4%	4.9	-0.4	520	+6%
North America	2,006	+22%	1,309	+12%	11,001	+13%	8.4	+0.1	1,533	+8%
Mainland Europe	1,837	+12%	2,065	+8%	16,149	-9%	7.8	-1.5	890	+4%
Other Areas	452	+5%	326	+11%	5,326	-1%	16.3	-1.8	1,387	-5%
<b>Total</b>	<b>5,385</b>	<b>+15%</b>	<b>5,793</b>	<b>+8%</b>	<b>42,756</b>	<b>-2%</b>	<b>7.4</b>	<b>-0.7</b>	<b>929</b>	<b>+6%</b>

Ireland welcomed almost 5.8 million overseas tourists for the period January-October 2024 (+8% over the same period in 2023), generating nearly €5.4 billion for the economy (+15%).

These overseas tourists accounted for almost 42.8 million nights. In the first ten months, overseas tourists typically stayed a week (7.4 nights), down from 8.1 nights during the same period last year. On average, tourists spent €929 per trip (+6% compared to the same period in 2023).

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

Purpose of Visit	Trips (000's)	% Change	Nights (000's)	% Change	Av. Stay (Nights)	Vol Change
Holiday	2,561	+16%	17,205	+11%	6.7	-0.3
Visiting Friends/Relatives	1,866	-4%	14,936	-9%	8.0	-0.4
Business	859	+14%	4,450	-5%	5.2	-1.0
Other	509	+15%	6,165	-10%	12.1	-3.4
<b>Total</b>	<b>5,793</b>	<b>+8%</b>	<b>42,756</b>	<b>-2%</b>	<b>7.4</b>	<b>-0.7</b>

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

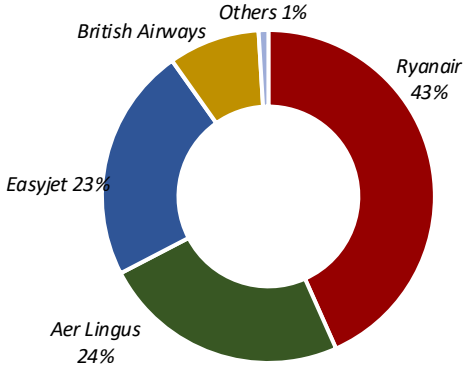
Just over one-third (35%) of overseas tourists cited visiting friends and relatives (VFR) as their main reason for visiting Ireland and they stayed an average of 8 nights.

One-in-ten (10%) of overseas trips were for business reasons, with a typical stay of 5.2 nights.

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

## Access update

### Winter 2024/25 GB to IOI forecast seat capacity



Winter 2024/25 total seats: 4.8 million

### News

- easyJet has commenced two new services to City of Derry Airport, from Edinburgh and Liverpool. Both will operate twice weekly on Mondays and Fridays throughout the year.
- Aer Lingus Regional, operated by Emerald Airlines, has begun a new four-times weekly service from Glasgow to Cork. Aer Lingus Regional has also increased capacity on its existing Bristol to Cork service, adding three extra flights per week.
- Ryanair has extra frequency on its London Stansted to Belfast International service this winter.
- Ryanair's service from Birmingham to City of Derry Airport, which relaunched in the summer, is being extended into the winter season. Ryanair will also add an extra return service on its Manchester to City of Derry Airport service for winter 2024/25.
- Ferry services between Holyhead and Dublin have been disrupted significantly in December, due to Storm Darragh.

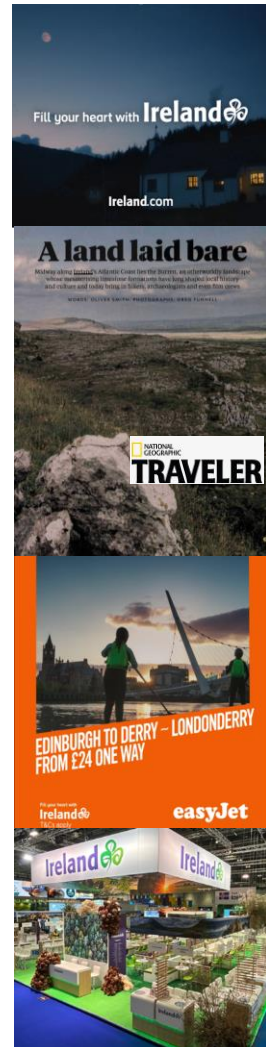
## Market activity update

### Inspiring Visitors

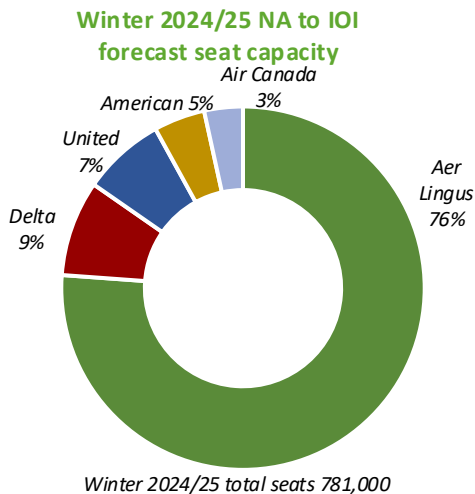
- **Fill your heart with Ireland campaign:** our autumn campaign to drive off-season visitors concluded on 30<sup>th</sup> November and is estimated to have delivered 200 million opportunities to see between September and November.
- **Fill your heart with Ireland kickstart campaign:** our kickstart 2025 campaign will commence on 24<sup>th</sup> December during a key holiday research period. Campaign channels will include TV, Connected TV, online video and social and the campaign will generate 50 million opportunities to see.
- **Publicity:** highlights resulting from recent media visits and our content push include Portrush being named one of *Condé Nast Traveller's* Best Places to Go for 2025 (4 million opportunities to see); a 12-page Wild Atlantic Way feature in *Wanderlust* magazine; and a 10-page feature on the Burren in *National Geographic*.
- **Media trips:** which will generate upcoming coverage include *The Guardian* (West Cork destination guide), *Radio Times* (Netflix Wednesday locations), *The Scotsman* (Waterford Christmas Market) and *The Times* (Northern Ireland accommodation).
- **Golf in Ireland:** a media partnership with *The Telegraph* on print, online, social and video channels delivered 4.7 million opportunities to see during October and November. The partnership showcased our world-class golf, attractions and experiences and highlighted the countdown to The Open 2025.

### Strengthening Partnerships

- **Co-operative carrier activity:** campaigns with Ryanair and easyJet are currently live, promoting direct access to the regions and targeting incremental visitors.
- **Short break campaigns:** activity with Expedia, Kayak, Travelzoo and Skyscanner, targeting holidaymakers searching for breaks to competitor destinations, was live from October to early December.
- **World Travel Market (WTM):** 75 island of Ireland industry partners participated on the Ireland stand, with over 3,000 commercial meetings taking place over three days in November.
- **Ireland Meets the West End, London:** our flagship meetings and incentives workshop involved 36 industry partners meeting with 38 GB event agencies, corporate meeting planners and incentive houses, with around 720 commercial meetings taking place.
- **Luxury B2B workshop, London:** Eight leading luxury hotels, DMCs and experience providers from the island of Ireland met luxury operators and agents from Great Britain to drive future sales.



## Access update



## News

### United States

- Aer Lingus will commence new services from Nashville and Indianapolis to Dublin, from April and May 2025 respectively. Delta Airlines will operate a new service from Detroit to Dublin, also from May 2025.

### Canada

- WestJet has confirmed the reinstatement of its seasonal St Johns to Dublin service, operating from May to October. Its Halifax to Dublin flight will also start a little earlier next year, from May.

## Market activity update – United States

### Inspiring Visitors

- **Autumn season extension campaign:** the campaign, which finished at the end of November, showcased how the island of Ireland is ‘always in season’. It ran across Connected TV (including Amazon, YouTube and Daily Motion) and delivered 30 million opportunities to see.
- **Fill your heart with Ireland kickstart campaign:** our campaign is live from 9<sup>th</sup> until 31<sup>st</sup> December, running on TV for two weeks in 12 areas with direct air access, as well as on Connected TV, online video platforms and social media, reaching an estimated 130 million.
- **Publicity:** recent highlights include a Halloween satellite media tour with TV host Gabe Saglie, who conducted 32 live television interviews on location in Ireland that reached an audience of 50 million+ across the US; journalist Catie Keogh broadcast on NBC Chicago and WGN.co, highlighting luxury accommodation and experiences, with an estimated reach of 1.5 million; author and travel aficionado Lisa Niver hosted an Ireland-themed show which aired nationwide, reaching an audience of 3 million; and a CBS TV show, *Hotels ByDesign*, broadcast from Ashford Castle, reaching 5 million.

### Strengthening Partnerships

- **Expedia campaign:** a campaign to drive visitors in Q4 ran from mid-August until the end of November. Platforms included online video, display ads and custom content; the campaign delivered 11 million opportunities to see.
- **Luxury marketing:** recent activity included attending the Signature Travel Network annual conference in November, where one-to-one meetings were held with 100 high-end travel advisors; a workshop with 150 travel advisors in partnership with Moloney & Kelly; 30 luxury travel advisors attended our Home of Halloween event in San Diego; and a luxury event in Los Angeles with seven island of Ireland partners resulted in 200+ meetings.
- **Co-op airline activity:** campaigns promoting flights to Shannon are live with Delta Airlines and United Airlines and will run until the end of the year, reaching over 10 million.
- **Golf:** Tourism Ireland sponsored the Invited Champions Classic Kiawah Island Golf Resort, an annual pro-am golf tournament which was attended by 168 high net-worth consumers.
- **Familiarisation trips (luxury and affinity group):** Tourism Ireland hosted two recent trips, including a luxury group comprising Virtuoso and Signature Travel Network advisors with visits to 10+ luxury island of products. A second trip, comprising five tour operators specialising in group travel, also included a platform for 29 industry partners to engage with these influential buyers.
- **Business events: IMEX America, Las Vegas:** there were 37 island of Ireland partners on our Meet in Ireland stand, who conducted 1,900+ meetings over three days; 17 group presentations were delivered. Tourism Ireland also hosted an Ireland golf tournament, in association with MPI Foundation, which was attended by 45 MICE planners.



## Market activity update

### Canada

#### Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign continues and to date has delivered 118 million+ opportunities to see, 314,000 engaged sessions on Ireland.com and 9,000 incremental followers on Facebook.
- **Home of Halloween at Casa Loma:** Tourism Ireland hosted 25 trade and media partners at an immersive Halloween experience in a Gothic revival-style castle in Toronto, to highlight the origins of Halloween on the island of Ireland, share story ideas and encourage future programming opportunities for Ireland.
- **Irish Night on the Hill:** the fourth annual Irish Night on the Hill event took place in Ottawa in November, with messages about direct flights, ancestry and ancient heritage shared with over 400 attendees.

#### Strengthening Partnerships

- **Air Canada co-op campaign:** activity is live and running through December, with 'Ireland Year-Round' messaging designed to drive off-season bookings to the island of Ireland in 2025.
- **Business Events Meet in Ireland showcase:** Tourism Ireland hosted three industry partners and 20 meeting and incentive planners in Toronto in December; this was followed by the SITE Holiday Social, which was sponsored by Tourism Ireland and provided the opportunity to connect with an additional 180+ attendees.
- **WestJet route expansion:** a press release highlighting the newly announced St John's Newfoundland to Dublin route was picked up by all major travel trade media; we also promoted the story in an e-newsletter to 2,000+ trade and media contacts.

### Australia

#### Inspiring Visitors:

- **Fill your heart with Ireland campaign:** a digital campaign is live and has been extended until the end of December, running on Netflix, Kayo Sport and on digital outdoor screens in key locations across Sydney. To date, the campaign has created 35 million opportunities to see and this is expected to increase by a further 8.5 million opportunities to see, due to a campaign extension.

#### Strengthening Partnerships:

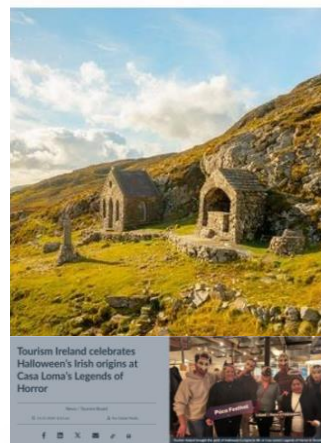
- **Australia and New Zealand sales mission:** Tourism Ireland organised a four-city sales mission with 11 island of Ireland industry partners and three Australian-based tour operators at the end of November/early December. B2B evening events were held in Brisbane, Sydney, Melbourne and Auckland, where partners had the opportunity to connect with over 250 travel professionals. Additional events were organised for meetings with leading tour operators and media contacts in Australia.
- **Tour operator co-op activity:** a campaign with Collette ran in print and on social media during November, promoting their Ireland tours as part of a Black Friday sale to drive 2025 travel.
- **Luxury trade communications:** a dedicated trade ezine highlighting luxury travel on the island of Ireland was distributed by [LATTE](#) in November; and a separate ezine highlighting high-end experiences was sent by Virtuoso to luxury travel advisors in early December.



### Ireland year round

Travellers can discover Ireland's natural beauty and its rich history with year-round flights to Dublin.

[Learn more](#)



## Access update – Southern Europe

### Winter 2024/25 France, Spain, Italy forecast seat capacity (excl. sun/ski)



Winter 2024/25 seats (excl. sun/ski): 1.1 million

### News

#### France:

- Air France will launch seasonal Paris to Cork flights in 2025, starting in early March and running until the end of October, with increased frequency in the peak summer months.

## Market activity update

### France

#### Inspiring Visitors:

- **TripAdvisor partnership:** activity is live across southern European markets (France, Italy and Spain) during December, positioning the island of Ireland as a must-visit destination for 2025.
- **Kickstart campaign:** our campaign is live and includes sponsorship ads on two Netflix series and documentaries, TV sponsorship on TV channel France TV, a takeover of a film collection on TF1+, as well as ads on Connected TV, YouTube and replay TV channels.

#### Strengthening Partnerships:

- **Co-op campaigns:** recent activity includes campaigns with Voyage-Privé and Odigeo to drive bookings in Q4 and early 2025.
- **Partnerships:** include with Perfect Stay on La Collection AF and Transavia Holidays; with FRAM on digital, social and window display and in 55 travel agencies; and with TUI on their website/ social media channels and agencies.
- **Golf:** Tourism Ireland partnered with Fáiite Ireland and tour operator Golf Plus Voyages at the recent French Open golf tournament.
- **Luxury:** recent activity has included a workshop with 15 island of Ireland partners and 41 buyers; and a familiarisation visit for five key French luxury travel agents which included Adare Manor, The Merrion and Mount Juliet Estate.
- **Business events:** a roadshow in Lyon and Paris provided platforms for eight island of Ireland partners to engage with 44 French MICE buyers, with 352 commercial meetings taking place.

### Italy

#### Inspiring Visitors:

- **Fill your heart with Ireland campaign:** a short break digital and social campaign promoting Belfast, Galway, Cork and Dublin created 114 million opportunities to see.
- **Kickstart activity:** a digital, social and connected TV campaign is live in December, promoting travel in Q1 2025; it aims to create 23 million opportunities to see.
- **TV broadcast:** two episodes of the TV show *I viaggi del Cuore* featured the legacies of St Patrick and St Brigid; both aired recently on Mediaset Canale 5, reaching 4.4 million.

#### Strengthening Partnerships:

- **MPG/familiarisation trip in Ireland:** seven tour operators and Aer Lingus met with Tourism Ireland, Fáiite Ireland and DMCs in Dublin to plan for 2025; the meeting was followed by a familiarisation trip to Wicklow, Wexford and Howth, visiting attractions and meeting industry partners.

### Spain

#### Inspiring Visitors:

- **Kickstart social and YouTube video campaign:** activity is live during December, promoting off-season travel and creating an estimated 23 million opportunities to see.

#### Strengthening Partnerships:

- **Trade familiarisation trip:** 11 Spanish buyers explored Belfast, Derry-Londonderry and the Causeway Coast in November, to enhance client itineraries' consideration.



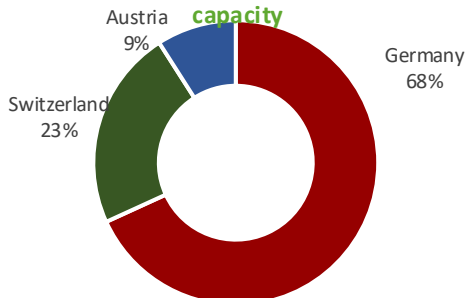


# Central Europe - Germany, Austria and Switzerland



## Access update

### Winter 2024/25 Germany, Switzerland, Austria forecast seat capacity



Winter 2024/25 total seats: 651,000

### News

#### Austria and Switzerland:

- Edelweiss' seasonal Zurich to Cork service is scheduled to resume in April 2025.

## Market activity update

### Germany

#### Inspiring Visitors:

- **Halloween campaign:** our recent Home of Halloween campaign created 34.4 million opportunities to see
- **Whiskey:** Joe Bausch, a high-profile German actor, visited in October and explored our tradition of whiskey distilling; his content will feature in various German publications and has been promoted on our social channels. A whiskey campaign is live in December, on social and digital channels, celebrating 700 years of whiskey distilling on the island of Ireland.
- **Kickstart campaign:** our campaign started on 2<sup>nd</sup> December on digital, social, TV and Connected TV and will run until the end of December, to inspire German holidaymakers and drive early bookings for 2025.
- **Natourale award:** Tourism Ireland won first prize for the best commercial at the Natourale Film Festival for our YouTube film 'Irland, Eine Lovestory'.
- **Wild Atlantic Way:** a campaign with Travelzoo promoting the Wild Atlantic Way ran in November, to inspire people to visit this part of Ireland in 2025.
- **Co-op activity:** campaigns with Berge & Meer and Clevertours have been running in November and December, to inspire winter travel. Both tour operators created new tours/packages for the winter season for the campaign.

#### Strengthening Partnerships:

- **Media and trade event:** island of Ireland industry partners connected with German travel trade and media at a Halloween event in Munich.
- **Ireland Meets Germany:** our Ireland Meets Germany workshop took place in November, connecting 30 industry partners from Ireland with 25 trade partners from Germany.
- **Consulate:** Tourism Ireland attended the official opening of the new Irish consulate in Munich.

### Austria and Switzerland

#### Inspiring Visitors:

- **Fill your heart with Ireland campaign:** our campaign kicked off on YouTube on 2<sup>nd</sup> December, to drive travel to the island of Ireland in 2025.
- **Caravan Fair:** Tourism Ireland attended the Suisse Caravan Salon in Bern, in October, together with Bunk Campers, highlighting the island of Ireland as a slow travel and caravanning destination.
- **Co-op activity:** an Expedia short break campaign is live from September to December.

#### Strengthening Partnerships:

- **Trade events:** Tourism Ireland attended trade events with Ruefa (online travel agency) in Graz and Vienna, to promote their island of Ireland programme for 2025.

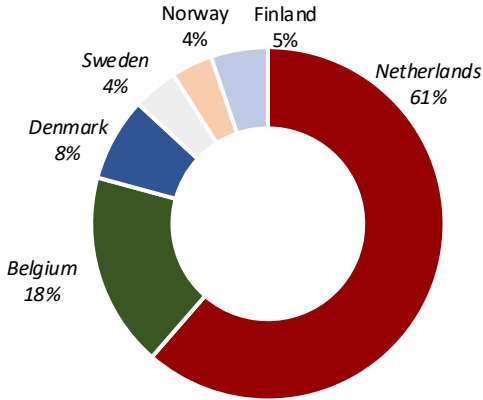


# Northern Europe – Netherlands, Belgium and the Nordics



## Access update

### Winter 24/25 Northern Europe to IOI forecast seat capacity



Winter 2024/25 total seats: 744,000

### News

#### Netherlands and Belgium:

- KLM has added an additional daily flight between Amsterdam and Belfast City Airport, bringing the service to twice daily.

## Market activity update

### The Netherlands and Belgium

#### Inspiring Visitors:

- **Belfast short break campaign:** a campaign promoting trips to Belfast and surrounding areas is running this December in the Netherlands, with a reach of 10.5 million.
- **Publicity:** the island of Ireland has featured in Dutch and Belgian lifestyle publications and newspapers recently, including *Margriet*, *Knack Weekend* and *Het Laatste Nieuws*, with a combined reach of 1.8 million.
- **PR newsletters:** newsletters have been shared regularly with 1,000+ media contacts and featured themes such as the 'Top 5 Things to Do in Ireland this autumn/winter'.

#### Strengthening Partnerships:

- **Partnerships:** activity includes a campaign with Skyscanner to drive incremental visitors to Belfast and Northern Ireland in Q4 2024 and Q1 2025.
- **Co-op activity:** campaigns with Dutch and Belgian tour operators are running throughout November and December, to boost bookings for 2025.
- **New charter service:** a joint multi-media campaign with BBI Travel to promote a new charter service launching in June 2025 from Eelde, Groningen to Ireland West Airport Knock, began at the end of November.

### Nordics

#### Inspiring Visitors:

- **Off-season city breaks campaign:** a campaign promoting Belfast and Dublin in the off-season has created 5 million opportunities to see and over 300,000 video views to date.
- **'Home of Halloween':** Rock Klassiker, a Swedish breakfast radio show, broadcast from the Derry Halloween Festival, creating around 4 million opportunities to see.
- **Media and trade events:** Tourism Ireland organised two media and trade events in Copenhagen and Stockholm, which had a focus on 'Home of Halloween' and sustainability messaging; 80 local partners attended.

#### Strengthening Partnerships:

- **Travel News Market:** Tourism Ireland attended the leading B2B travel event in Sweden, together with four island of Ireland industry partners, in early December.
- **Co-operative campaigns:** activity is live with Stjernegaard Rejser and Albatros Travel promoting their island of Ireland programmes for 2025.



**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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