

# SOAR

## (Situation & Outlook Analysis Report) April 2023



The International Monetary Fund's (IMF) latest [World Economic Outlook report](#) highlighted areas of caution in the global economy. The economic outlook is uncertain again amid high inflation, financial sector turmoil and the ongoing effects of Russia's invasion of Ukraine.

The baseline forecast for global growth is expected to be +2.8% in 2023, before rising to +3% in 2024. Advanced economies are expected to only grow by +1.3% in 2023. Global headline inflation is set to fall to 7% in 2023, on the back of lower commodity prices but underlying (core) inflation is likely to decline more slowly.

A strong restoration of direct air access capacity to the island of Ireland is scheduled for the upcoming summer season. Based on latest OAG filings, scheduled air seat capacity to the island of Ireland for June 2023 will be 102% of June 2019 levels, with almost 2.7 million seats filed.

Scheduled seat capacity from GB and Other Areas is above 2019 levels, at 107% and 112% respectively. Seat capacity from Mainland Europe and North America is filed at 99% and 96% of June 2019 levels respectively.

Latest data from the CSO shows a total of almost 2.5 million arrivals (including residents of the Republic of Ireland and Northern Ireland) to air and sea ports in the Republic of Ireland during the first two months of 2023. This represents 103% of January-February 2019 levels.

STR reports that hotel occupancy on the island of Ireland was 67% for the first three months of 2023, a +2% increase on the same period in 2019. The average daily rate was €141, a +33% increase on January-March 2019.

Tourism Ireland's new global campaign – 'Fill your heart with Ireland' – is live in our key markets around the world. The campaign is all about celebrating the different ways in which the island of Ireland fills the hearts of our visitors and of locals – and inviting potential holidaymakers to come and experience the island of Ireland for themselves. It's an advocacy-led campaign running on multiple channels – including TV, cinema, social media, online and outdoor. In March, Tourism Ireland worked closely with Fáilte Ireland, Tourism NI, the industry on the island of Ireland and overseas trade partners at Meitheal and Meet The Buyer.

Recent [research](#) from the European Travel Commission (ETC) shows that despite financial concerns and higher travel costs, Europeans remain eager to travel. Rising travel costs due to inflation, the ongoing war in Ukraine and concerns about extreme weather conditions are playing a part in Europeans' travel choices for spring and summer 2023. More travellers are willing to choose off-peak summer travel (pre-August) to avoid overcrowding and peak prices. While travellers appear ready to shift dates, the findings suggest they are not willing to sacrifice the length of their trips.



# Economic Conditions



## Great Britain

Oxford Economics has slightly revised up its 2023 UK GDP forecast, based on favourable historical data revisions and evidence of greater resilience in recent data. Oxford forecasts GDP to grow +0.3%, up from 0% in their last estimate. However, it expects tighter financial and credit conditions caused by the strains in the banking sector to weigh on activity next year.

### Exchange rate

Apr '22 £1 : €1.20      Apr '23 £1 : €1.13

## US

Early 2023 data shows solid economic momentum and Oxford Economics has pushed back the start of the forecast mild recession to Q3 2023 from Q2. Demand is holding up and the Federal Reserve's rate hikes haven't slowed growth notably, though cracks are showing in the technology and banking sectors. Elevated inflation and a strong labour market signal the Fed will continue tightening monetary policy. GDP growth is forecast at +0.9% for 2023.

### Exchange rate

Apr '22 \$1 : €0.91    Apr '23 \$1 : €0.91  
Apr '22 \$1 : £0.76    Apr '23 \$1 : £0.80

## France

Business surveys suggest that the French economy is staying resilient. Oxford Economics forecasts GDP of +0.5% this year. Despite a fall in energy prices, inflationary pressures persist and are forecast to average about 5% this year. The labour market remains robust; however, Oxford Economics still expects private consumption to fall, as households prefer to save rather than spend, owing to a lack of confidence.

### Exchange rate

Apr '22 €1 : £0.83    Apr '23 €1 : £0.88

## Germany

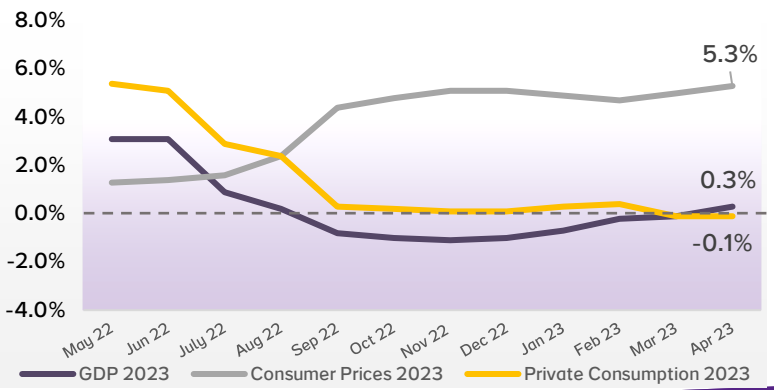
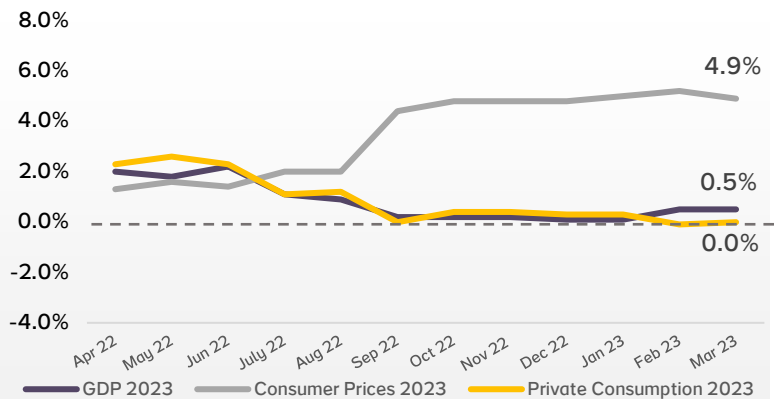
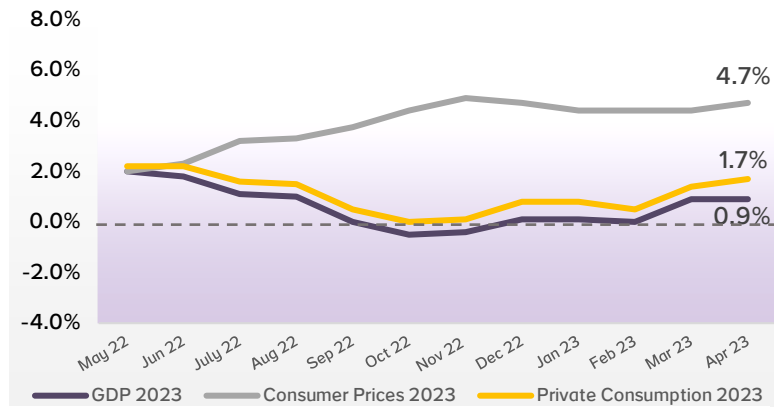
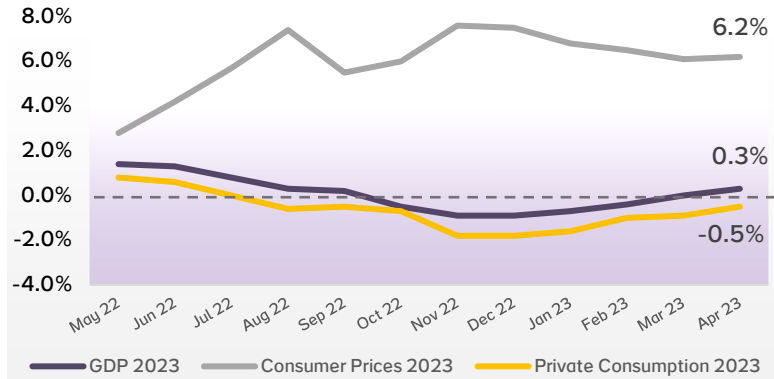
German industry and construction had a better-than-expected start to the year. While Oxford Economics expects to see some reversal in that strength, the economy is likely to avoid a technical recession, leading to a 2023 GDP growth forecast of +0.3%. Recent market turbulence will likely add to the monetary policy headwinds later this year and next.

### Exchange rate

Apr '22 €1 : £0.83    Apr '23 €1 : £0.88

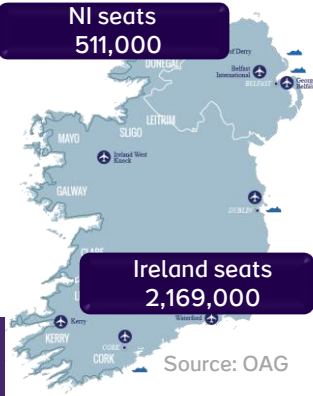
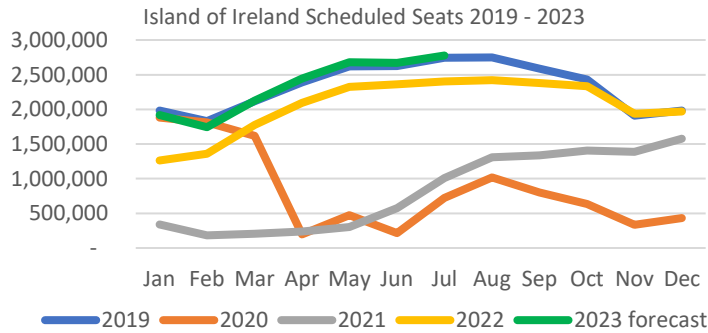
## 2023 Economic Outlook by Oxford Economics trended by month

Source: Oxford Economics



# Island of Ireland Access Situation

## June 2023 Forecast Seat Capacity

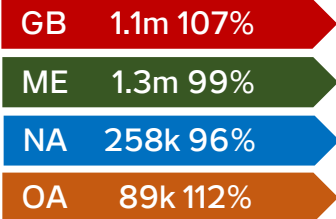


A strong restoration of direct air access capacity to the island of Ireland is scheduled for June 2023. Based on latest OAG filings, air seat capacity to Ireland is planned at 102% of June 2019 levels, with Northern Ireland also scheduled to be at 102%.

Seat capacity to the island of Ireland for June 2023 is scheduled at 102% of the level it was in June 2019.

## Air Access June 2023 forecast – % share of 2019

### IOI Seat Capacity



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

Scheduled seat capacity from GB and Other Areas is above 2019 levels, at 107% and 112% respectively. Seat capacity from Mainland Europe and North America is filed at 99% and 96% of June 2019 levels respectively. Airlines are scheduled to operate close to 16,000 flights in June 2023.

## Airports Forecast – June 2023

Cork and Dublin airports are currently filed to return to 104% and 101% of their respective 2019 seat capacities. Belfast International Airport and Belfast City Airport are filed at 111% and 83% respectively.

Shannon (117%), Knock (119%) and Kerry (108%) are all filed above June 2019 levels.

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

Airports	June 2019 Seats	June 2023 Seats	2023 % share of 2019
Belfast Intl.	345,138	382,657	111%
Belfast City	143,037	119,238	83%
City of Derry	11,224	9,138	81%
Dublin	1,806,963	1,815,361	101%
Cork	158,269	164,763	104%
Shannon	98,188	115,303	117%
Knock	46,064	54,678	119%
Kerry	17,388	18,711	108%
Donegal	726	0	0%
<b>Total</b>	<b>2,626,997</b>	<b>2,679,849</b>	<b>102%</b>

## Ferry Performance – Jan-Mar 2023 vs Jan-Mar 2019

The latest available performance data is for the first three months of 2023 and shows ferry passengers to and from the island of Ireland at 98% of January-March 2019 levels. Performance data from Spain is not available.

Ferry Passenger Traffic	Jan-Mar 2023 % share of Jan-Mar 2019
Northern corridor	111%
Central corridor	83%
Southern corridor	77%
French corridor	197%
<b>Total</b>	<b>98%</b>

Ferry	Jan - Mar 2019	Jan - Mar 2023	2023 % share of 2019
<b>GB - island of Ireland</b>			
Sailings	5,136	4,475	87%
Passengers	722,637	684,710	95%
Cars	181,260	197,055	109%
<b>France - Ireland</b>			
Sailings	136	236	174%
Passengers	27,488	54,060	197%
Cars	7,356	8,684	118%

Sources: OAG and Ferrystat

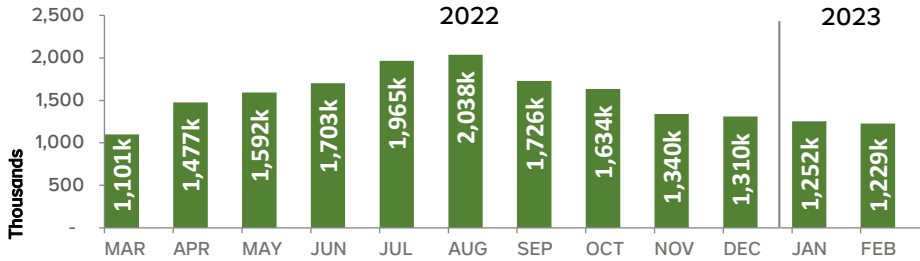
# Performance to date



## Republic of Ireland Overseas Arrivals

Note: Overseas arrivals are ALL passengers travelling through ROI air and sea ports (including residents of the Republic of Ireland and Northern Ireland).

### ROI OVERSEAS ARRIVALS 2023 VS 2019



**ROI OVERSEAS AIR ARRIVALS**  
LATEST FEB 2023: **1.2m 104%**  
JAN-FEB 2023: **2.4m 104%**



**ROI OVERSEAS SEA ARRIVALS**  
LATEST FEB 2023: **45K 100%**  
YTD JAN-FEB 2023: **80K 96%**

## Republic of Ireland overseas arrivals January-February 2023

Main market area	Jan-Feb 2023 (000's)	2023 % share of 2019
Cross-Channel	942	92%
North America	166	92%
Mainland Europe	1,257	113%
Rest of the world	115	130%
<b>Total</b>	<b>2,481</b>	<b>103%</b>

The latest available data from the CSO shows nearly 2.5 million overseas arrivals to air and sea ports in the Republic of Ireland during the first two months of 2023 (this includes residents of the Republic of Ireland and Northern Ireland).

Arrivals data for January-February 2023 was at 103% of January-February 2019 levels.

Source: CSO

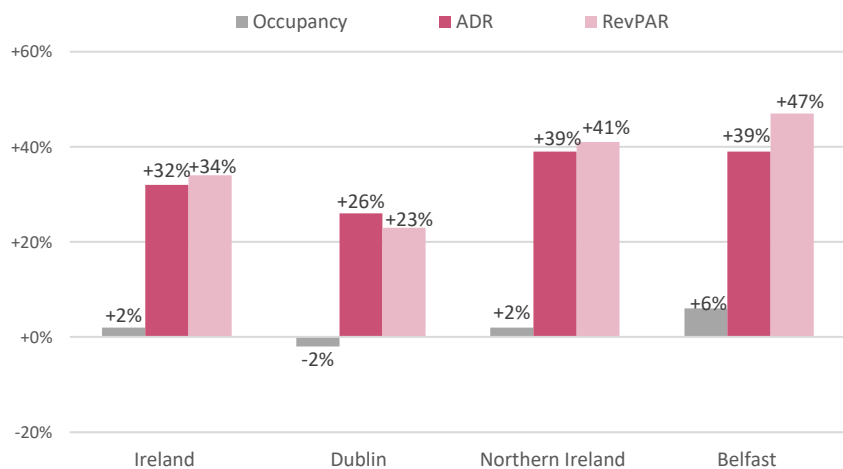
## Hotel accommodation

Latest performance data available from STR reports that hotel occupancy for January-March 2023 in Northern Ireland was 62%, up +2% on January-March 2019. In Ireland, occupancy was 67%, up +2% on January-March 2019.

The average daily rate (ADR) for a room in Northern Ireland in January-March 2023 increased by +39% to £95 and in Belfast by +39% to £95, when compared to the same period in 2019.

In Ireland, the average daily rate in January-March 2023 was €146, up +32% when compared to the same period in 2019. The average daily rate in Dublin for the first three months of 2023 was €156, up +26% on the same months in 2019.

## Island of Ireland Hotel Performance Jan-Mar 2023 / Jan-Mar 2019 % change



<b>ADR</b>	€146	€156	£95	£95
<b>Occupancy</b>	67%	72%	62%	65%

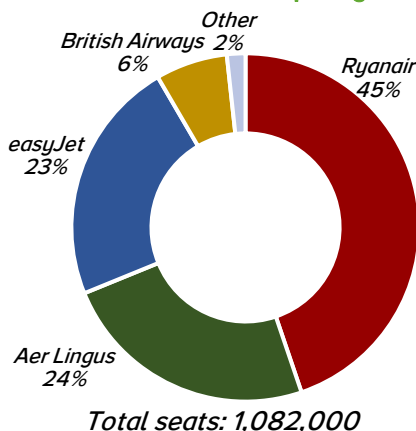
Note: Data include residents from the Republic of Ireland and Northern Ireland.

ADR = Average Daily Rate

Source: STR 2023

## Access update

June 2023 GB to IOI forecast seat capacity



## News

- From 1 April, Air Passenger Duty (APD) was halved on domestic UK flights.
- Ryanair has re-established a Belfast International Airport base, with flights from Stansted, Manchester, East Midlands, Cardiff and Edinburgh.
- easyJet has added capacity on services to Belfast City and Belfast International airports from London Gatwick, London Luton, Glasgow, Edinburgh and Manchester. easyJet has new routes to Belfast City from London Luton and Manchester, operating from June 2023.
- The UK Government has confirmed £1.1 million of PSO funding to support the London Stansted to City of Derry route (operated by Loganair) until March 2024.
- Aer Lingus has begun serving Ireland West Airport Knock from Heathrow.
- Ryanair's summer schedule to Kerry includes London and Manchester.
- Loganair will restore its Glasgow to Donegal service from 1 July until 24 September.

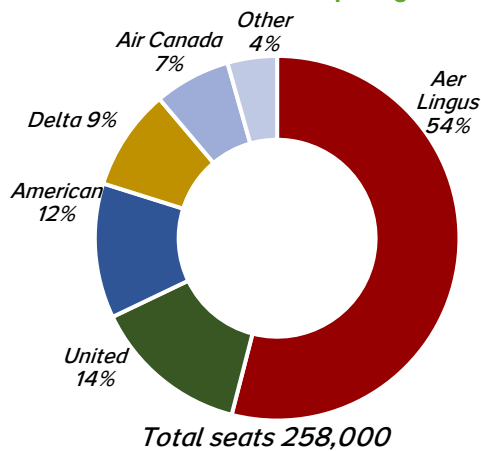
## Market activity update

- **Advertising:** Our 'Fill your heart with Ireland' (FYHWI) campaign launched in GB on 17 March – on TV, BVOD (broadcast video-on-demand), social and digital, reaching 15.5 million people on the opening weekend. This burst of the campaign will be live until the end of May.
- **St Patrick's Day Activity:** Tourism Ireland's pop-up green dance floor publicity stunt brought Irish dancing to London's South Bank on St Patrick's Day, with a kinetic light-up green dance floor, which generated coverage in several publications including *Metro*, *Mail Online*, *Yahoo* and *South London Press*, broadcast coverage on *London Live* and social coverage on *BBC London* and *My London*. Our GB publicity team also hosted 30 top journalists at an event where key updates from the island of Ireland were shared.
- **St Patrick's Day Diaspora and Industry Opportunities:** Events were held in London and Glasgow. In Glasgow, industry partners – including Visit Derry, Loganair and Donegal County Council – joined us at the St Patrick's Day Festival Day at Merchant Square. Two business tourism workshops were hosted in London and Manchester.
- **Media Visits and Coverage:** Widespread coverage followed Jane Memmler's trip for Titanic Belfast's reopening, resulting in 10 pieces of coverage in titles like the *Daily Mirror*, *Sunday Mirror*, *Daily Express*, *Daily Record* and *Daily Star Sunday*. Recent media trips include Fergus Collin's exploration of the St Patrick's Way for *Countryfile*; and *Great Outdoors Magazine* covered hiking in Sligo. In April, five journalists representing *The I*, *Great Outdoors Magazine*, *Culture Trip*, *LoveExploring* and *Travel Weekly* were hosted on a group press trip to Co Down, to mark the area's upcoming UNESCO geopark accreditation.
- **Broadcast:** David Attenborough's *Wild Isles* delivered excellent coverage for Killarney National Park, which featured in the show. We supported the TV series *B&B by the Sea* – which began airing on 10 April and ran for three weeks. Coverage was included in *Radio Times*.
- **Co-op and Partnerships:** Regionally focused six-week campaigns with Aer Lingus and Irish Ferries kicked off in April, to drive incremental bookings on regional routes. A Kayak campaign started in April, focusing on regionality and sustainability with locally-led experiences in Ireland's Ancient East.
- **Market Trade Co-Op:** Campaigns are live with key operators including Glenton Holidays and Leger Shearings.
- **British Tourism and Travel Show (22 and 23 March):** Tourism Ireland attended the two-day event with partner, including Hinch Distillery, Dalata Hotels, Holiday Ireland Hotels and Select Hotels.
- **NI Made for Golf:** campaigns ran during March on *Smooth FM*, as well as with partners Golfbreaks.com and YourGolfTravel, encouraging consumers to plan and book a golf trip to Northern Ireland.



## Access update

June 2023 NA to IOI  
forecast seat capacity



## News

### USA:

- Aer Lingus restarted its Hartford Connecticut to Dublin route on 26 March.
- A new Aer Lingus Cleveland to Dublin service will begin on 19 May.
- United Airlines will recommence its Chicago to Shannon route on 26 May.

## Market activity update

### USA:

- **Advertising:** Our new campaign launched in April on TV and Connected TV, digital and social platforms; it is supported by our ongoing tactical partner programme, 'always-on' activities and diaspora media activity.
- **St Patrick's Day Activity:** Extensive programme of activity was undertaken around 17 March across the US, promoting the island of Ireland as a 'must-see' destination.
- **Golf Advertising/Sponsorship:** Activity continued into April, with the launch of the NBC Golf Channel campaign. New 30-second ads were broadcast during the US Masters and will continue to air through to September around all the Majors. Additional activity includes partnerships with *Golf Digest*, *LINKS Magazine* and sponsorship with leading golf correspondents.
- **Meitheal and Meet the Buyer:** 54 key buyers from the US attended Meitheal in Killarney and 29 attended Meet the Buyer in Belfast. Ten new operators participated for the first time this year.
- **Best of Ireland sales mission:** Island of Ireland partners and US tour operators participated in B2B events in Raleigh, Atlanta, Sarasota and Boca Raton, connecting with around 300 top travel advisors.
- **Airline co-op:** An Aer Lingus campaign in March, promoting off-season deals, reached an audience of 30 million, while campaigns with United Airlines and Delta are going live in late April and early June.
- **Publicity:** Island of Ireland specific TV shows created by the travel-focused Public Broadcasting Service (PBS) launched in March; they will run for at least three years, with a potential reach of 300+ million.
- **Travel Classics Media Conference:** We hosted top US editors and writers (with a collective audience reach of an estimated 270 million+) at Ashford Castle, with pre and post tours showcasing the entire island of Ireland.
- **Ireland IMAX screening:** 60 trade and media event attended our event in Los Angeles on the occasion of the visit of Minister Catherine Martin, to leverage pre-Oscar 'buzz' about Ireland.



...to show you everything Ireland has to offer.



### Canada:

- **Advertising:** Our FYHWI campaign launched on 13 April across digital and programmatic, as well as on travel sites Tour Radar and Travelzoo.
- **SPD broadcast:** Irish chef Kevin Dundon appeared live on Canadian breakfast television shows highlighting St Patrick's Day and Irish recipes. A segment on *Breakfast Television* highlighted the culinary and cultural highlights of St Patrick's Day and Irish Heritage Month.
- **Airline Co-Op:** A digital campaign ran in April with WestJet, to promote travel from Calgary to Dublin.
- **Meitheal and Meet the Buyer:** Four Canadian trade buyers attended both events, engaging in 300+ appointments with industry, as well as participating in fam trips across the island of Ireland.

### Australia and New Zealand:

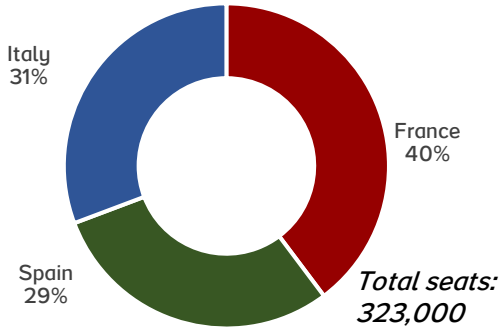
- **Advertising:** Our kickstart digital campaign is live on social channels, YouTube, podcasts and display.
- **St Patrick's Day Activity:** We sponsored the Lansdowne Club Lunch event in Sydney on St Patrick's Day, which was attended by 1,500 influential Irish and Australian businesspeople.
- **Meitheal and Meet the Buyer:** Four buyers attended Meitheal and two attended Meet the Buyer.

# Southern Europe – France, Spain and Italy



## Access update – Southern Europe

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



### News

#### France:

- Emerald Airlines will operate a new service from Brest to Dublin, from the end of May until the end of October.
- Chlair has announced a new Brest Quimper to Kerry service, which will run from 1 July to 2 September.
- Vueling has announced it will stop operating its services to Shannon and Cork.

#### Italy:

- Ryanair has begun operating a new flight from Trieste to Dublin, operating twice weekly. There is also a new Ryanair flight from Naples to Shannon since April, running twice weekly.

## Market activity update

### France

- **Advertising:** Our new FYHWI campaign went live on 27 March, on digital (including segmented TV and Netflix), social and digital outdoor.
- **St Patrick's Day Activity:** An underground event in Bellecour (in Lyon) featured a XXL digital screen showcasing the island of Ireland, as part of our campaign with Voyamar; this also included window displays and digital screens in the travel agencies of the Marietton network.
- **Wild Atlantic Way Point-to-Point campaign** began in April, promoting direct access to Cork and Kerry by air and sea from Paris, Roscoff, Brest and Quimper.
- **Co-op campaign with Stena Line** is running to drive incremental bookings on the service and to promote the new vessel.
- **Partnerships campaigns** with Voyage Privé and PerfectStay are live to promote packages to the island of Ireland.
- Our **Wild Atlantic Way roadshow** came to Paris on 20 April, with key French media and travel trade in attendance.

### Italy

- **Advertising:** Our FYHWI campaign went live on 3 April – on digital and social, as well as TV on demand.
- **St Patrick's Day:** our **Ireland Week in Milan** took place on 12-19 March, with 50+ events showcasing our culture, music, literature, food and experiences.
- Our **Wild Atlantic Way roadshow** took place in Milan in April, with key Italian media and travel trade in attendance.
- **Co-op campaign** with Ryanair is live to promote its new Milan to Belfast service.
- **Virtual workshop "Meet Ireland"** with around 40 industry partners took place in April.

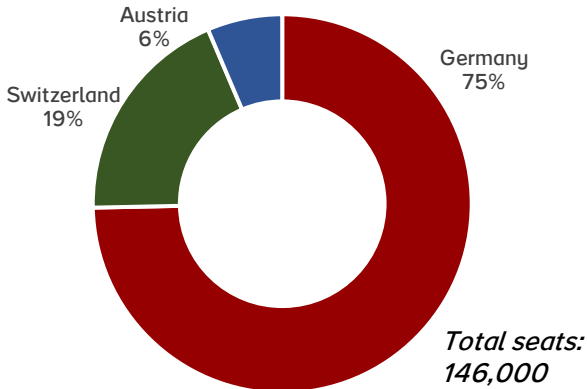
### Spain

- Our **FYHWI campaign** went live on 3 April and will run until the end of May, reaching a targeted audience of approximately 3 million. A dedicated geo-targeted burst will run on digital radio, Connected TV and digital outdoor screens (in areas of high footfall), with a focus on regional and ease of access messaging in key Spanish gateways.
- **St Patrick's Day Activity:** major media coverage of 'Semana de Irlanda' (Ireland week) in Madrid, with our San Patricio Metro takeover which included a stunt and musical performance by Sharon Corr. The programme of activities included an Ireland photo exhibition, music and dance with UCD Dance Society, as well as promotion of Irish literature with a booklet distributed across the metro transport library network.
- **Trade sales mission** took place in March, with 250 top Spanish tour operators and travel agents, as well as influential travel journalists, attending our 'Irlanda llega a tu corazón' B2B events in Madrid, Bilbao and Barcelona.
- **Co-op campaign with Brittany Ferries** kicked off in April, with a regional focus (Bilbao-Rosslare) to drive incremental bookings for Q2. Other in-market campaigns with Atrápalo, Logitravel and B Travel will go live in April and May.



## Access update

### June 2023 Germany, Austria Switzerland forecast seat capacity



### News

A new Lufthansa service from Frankfurt to Belfast International commenced in April.

## Market activity update

### Germany

- **Advertising:** Our 'Fill your heart with Ireland' campaign launched on 14 March on TV and digital, complemented by PR and partnerships, including with Lufthansa and DERTOUR Reisebüro, to extend the reach of the new campaign.
- **St Patrick's Day Activity:** activity included our participation in the parade in Munich, as well as attendance at an event in the Irish Consulate in Frankfurt. We also undertook partner activity with Radio Frankfurt, Bayrischer Golfverband and Kerrygold.
- **ITB Berlin:** 29 island of Ireland industry partners attended, with positive feedback received regarding future business. There were also ad-hoc enquiries from new travel agencies who noticed our stand and requested meetings to discuss future Ireland programmes.
- **Meitheal and Meet the Buyer :** 16 German tour operators (19 representatives) attended Meitheal and seven attended Meet The Buyer.
- Five **networking events** around the Riverdance tour took place across Germany, with key trade and media attending.
- A **partnership** with Galeria Reisen, a popular German travel site, took place in Q1, promoting the island of Ireland to potential German holidaymakers.

### Switzerland

- **Advertising:** Our 'Fill your heart with Ireland' campaign commenced during St Patrick's Week and will run until 6 May on social and digital platforms including Connected TV.
- **Trade Engagement:** Five Swiss tour operators attended Meitheal and two attended Meet the Buyer. Nine island of Ireland industry partners have been recruited for a spring webinar series. We supported golf specialist TravelZone at a consumer golf show in Luzern.
- A **co-op campaign** with Edelweiss is being prepared to promote its Cork service.
- **Press:** We continue to highlight the direct flights to Cork and there will be a press trip to the southwest of Ireland in May. A journalist from the high profile Swiss *TCS Magazine* will also travel at that time, to write a feature on Irish gardens.

### Austria

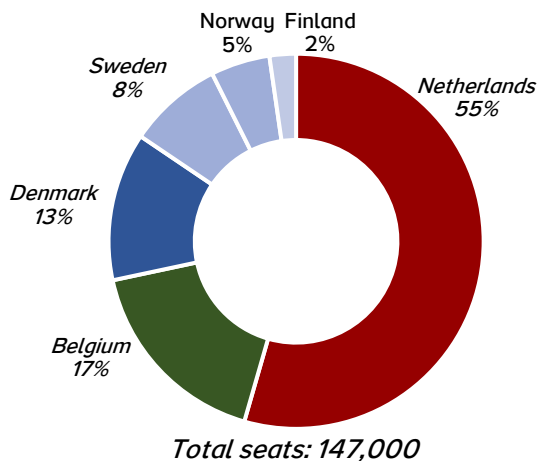
- **Meitheal and Meet-the-Buyer:** Six Austrian tour operators attended Meitheal and two attended Meet the Buyer. Other activities included hosting trade at a Riverdance event in Vienna, a travel event with Biblische Reise and a shared stand with Kneissl at the Vienna Travel Fair.
- **Press :** *Die Presse* (newspaper) was hosted in Belfast for a series of concerts and tours over Easter, to highlight Belfast's UNESCO City of Music status.
- **Consumer Communications** include online co-op and outdoor ad campaigns with Urlaubsguru, TUI and REWE. We ran a 'win tickets' competition with Riverdance at six regional events around Austria.





## Access update

### June 2023 Northern Europe to IOI forecast seat capacity



### News

- A new Widerøe flight from Bergen to Dublin will commence on 27 April.
- Norwegian Air has released its winter 2023 schedule and is planning to continue its Copenhagen to Dublin route, which has previously only been a spring / summer route.

## Market activity update

### Belgium and the Netherlands:

- **Advertising:** Our 'Fill your heart with Ireland' campaign launched on 20 March on multiple digital channels in the Netherlands and Belgium.
- **St Patrick's Day activities** included an Ireland photo exhibition in City Hall in the Hague, the release of *Ireland* (IMAX movie) which completely sold out (1,200 tickets), a competition on Cheaptickets.nl and sponsorship of the Irish Ball in Brussels.
- **Co-op campaigns:** Worked with Style in Travel, a key travel site in the Netherlands, promoting a new U2 music tour to Ireland. Other co-op activities currently live are with Imagine Travel, De Jong Intra and ANWB. A partnership with Skyscanner ran until the end of March, promoting direct flights to Belfast from the Netherlands.
- **Wild Atlantic Way roadshow:** In Amsterdam, we held a media and trade event on 26 April with six industry partners, to promote Cork and the unique experiences of the Southwest.
- **Upcoming fam trips** include Travel Counsellors (ten independent travel agents) will visit Northern Ireland (20-23 May) and 14 travel professionals will travel to Ireland's Hidden Heartlands and Northern Ireland (11-14 May).

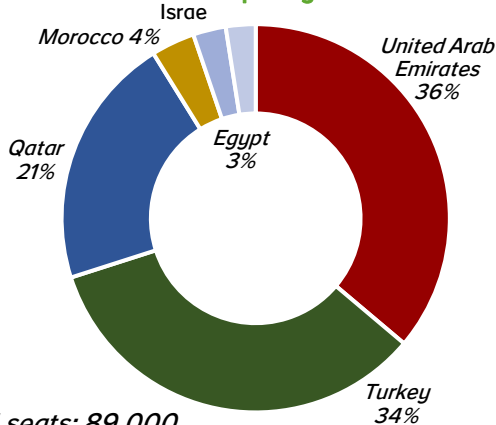
### Nordics:

- **Advertising:** Our 'Fill your heart with Ireland' campaign launched in the Nordics in March, on YouTube, social media and programmatic display. In addition, there was celebrity endorsement activity with Swedish celebrity Agneta Sjödin, including promotion on social media, radio ads, podcast and coverage in one of Sweden's largest newspapers *Dagens Nyheter*.
- **St Patrick's Day activities** included a media lunch event in Stockholm, with 20 key journalists, to launch our new campaign and encourage media visits to Ireland in 2023. On 15 March, we hosted a 'Food in Ireland' event in Copenhagen with Irish chef JP McMahon, which was attended by 15 Danish food and travel journalists.
- **Co-op activity** includes a campaign with local tour operator partners TEMA and Best Travel DK. We are also working with Widerøe to launch its new service from Bergen to Dublin; activity includes ads on social media, as well as digital screen ads at Bergen Airport.
- **Promoting the release** of *Dungeons and Dragons* and *An Cailín Ciúin* to our media database including ticket giveaways.
- Release of **latest podcasts** including The Irish National Stud and Vintage Tea Tours.



## Access update

### June 2023 Emerging Markets forecast seat capacity



### News

- Qatar Airways will increase the frequency of its Doha to Dublin service to double daily, from June.
- The EL AL Israeli Airlines new direct flight from Tel Aviv to Dublin launched in March. The flight will operate three days a week, year-round.
- China Eastern Airlines will increase its Shanghai to London flights to daily, from 3 May. Emirates Airways will increase its Shanghai to Dubai flights to two flights per day, from 1 July. Its Beijing to Dubai flights will also be increased to two flights per day, from 1 September.

## Market activity update

### Global Inbound:

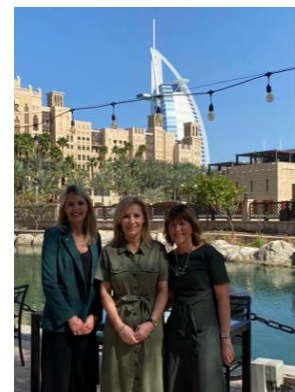
- **Partnership campaign** with AC Tours is running on digital and social channels, complementing educational webinars and itinerary developments.
- **Educational webinar series** with Miki Travel began in April.
- **Newsletters** about Ireland are being distributed by Kuoni Tumlare, focusing on sustainability and MICE products.

### Middle East:

- **Advertising:** Our new 'Fill your heart with Ireland' campaign launched in April on multiple channels, including programmatic and social media channels.
- **St Patrick's Day Activity:** Golf in Ireland event with Dnata Travel, G Golf Ireland and Sullivan Golf Travel, as well as media interviews and Embassy of Ireland reception with Minister Josepha Madigan.
- **Discover Europe Travel Summit:** 14 island of Ireland industry and 110 luxury buyers from UAE, Saudi Arabia, Qatar, Kuwait, Bahrain and Oman will join Tourism Ireland, Switzerland, Germany and Austria for a two-day, hosted buyers' event on 28-30 April, which will include workshops and networking events.
- The **Arabian Travel Market (ATM)** on 1-4 May is the largest travel trade event in the UAE. Tourism Ireland and VisitBritain are joining together to host a series of sales meetings and trade networking events for industry partners.
- **Media Visits:** *Vogue Middle East* visited Ireland in April for three days – visiting Dublin, Kildare, Galway and Clare. Lucas Raven, a journalist for *L'Officiel* and *Fact Magazine*, visited Kerry and Clare in April.

### China & India:

- **India:** Thomas Cook/Tata Motors India incentive group (250) will visit the island of Ireland on 6-9 July. Asian Paints incentive group (120) will visit Ireland and Northern Ireland on 9-15 June.
- **India:** Attended St Patrick's Day Embassy of Ireland reception with Minister Roderic O'Gorman.
- **China:** Business events and a reception organised by the Irish Embassy and Consulate around Minister Eamon Ryan's visit to Beijing and Shanghai for St Patrick's Day.
- **China:** Tourism Ireland's St Patrick's Day campaign on Weibo reached 60 million views. Sina Travel named Ireland one of top 10 overseas destinations to visit.
- **China:** Tourism Ireland and Paramount China *Dungeons and Dragons* campaign to promote Northern Ireland through Chinese social media. Paramount provided movie tickets and merchandise.



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