

# SOAR

## (Situation & Outlook Analysis Report) December 2023



The global economy continues to confront the challenges of inflation and low growth prospects, according to the Organisation for Economic Cooperation and Development's (OECD) [latest Economic Outlook](#). Global GDP growth has been stronger than expected in 2023; however, it is now moderating on the back of tighter financial conditions, weak trade growth and lower business and consumer confidence. Risks to the near-term outlook remain tilted to the downside and include heightened geopolitical tensions and a larger-than-expected impact of monetary policy tightening. The OECD projects global GDP growth of +2.9% in 2023, followed by a mild slowdown to +2.7% in 2024.



There is a very positive outlook for direct air access capacity to the island of Ireland for March 2024. Based on OAG filings, scheduled air seat capacity to the island of Ireland will be 110% of March 2019 levels, with 2.3 million seats filed for the month.

Seat capacity from each of our four market areas is positive. GB (101%), Mainland Europe (120%), North America (118%) and Other Areas (118%) are all filed above March 2019 levels.



STR reports that hotel occupancy in Northern Ireland for January-October 2023 was 76%, up +4% on January-October 2019. In Ireland, occupancy was 81%, up +1% on January-October 2019.

The average daily rate (ADR) for a room in Northern Ireland for January-October 2023 increased by +37% to £108, when compared to the same period in 2019. In Ireland, the average daily rate for January-October 2023 was €173, up +33% on the same period in 2019.



Tourism Ireland's extensive, highly targeted programme of promotions around the world continues. We've been highlighting the many reasons to visit the island of Ireland during the off-season months – including festivals and events like NYF Dublin (New Year's Festival) and TradFest – with the message that the island of Ireland has so much to offer across regions and seasons. We are showcasing iconic reasons to travel to the island of Ireland, expanding people's bucket lists from best-known spots to our hidden gems. Kickstart campaigns are live in our key overseas markets, to position us well for 2024.



International tourist arrivals to Europe rebounded strongly in 2023, according to the [European Travel Commission](#) (ETC). Forecasts suggest that international tourist arrivals in Europe will reach 2019 levels by 2024, a year earlier than initially predicted. Despite increased financial pressures, consumers continue to prioritise travel spending over other discretionary expenses. However, tourists are placing a greater emphasis on value for money, according to the ETC. Tourists are increasingly exploring ways to lower the overall cost of their holiday, with many opting for destinations that are perceived as more affordable, booking their transportation and accommodation well in advance, purchasing a package holiday or considering off-peak trips in the shoulder season.

# Economic Conditions



## 2023 Forecast Economic Outlook trended by month

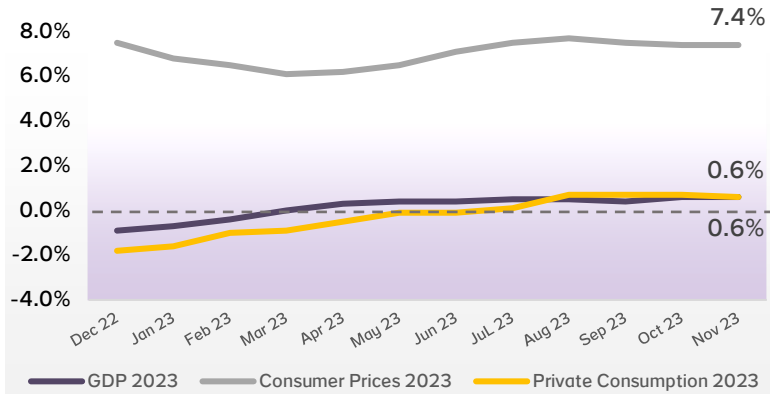
Source: Oxford Economics

### Great Britain

The growth outlook remains weak. Oxford Economics forecasts GDP growth of +0.6% in 2023 and just +0.4% in 2024. The lagged impact of tighter monetary policy and more restrictive fiscal policy settings will likely prevent activity from gaining momentum. However, with wage growth still high and inflation well above target, Oxford Economics doesn't expect interest rates to fall until the second half of 2024.

#### Exchange rate

Dec '22 £1 : €1.16      Dec '23 £1 : €1.16

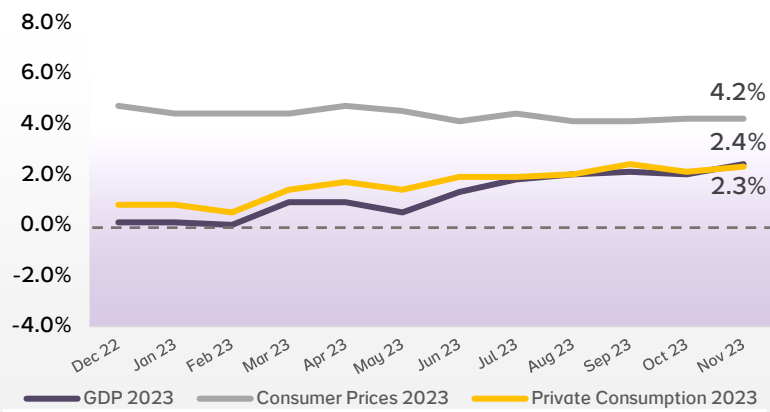


### US

Oxford Economics forecasts the US economy to slow significantly in 2024 and forecasts GDP growth will ease to +1%, due to restrictive monetary and fiscal policies. Oxford Economics continues to think the strength of consumer spending is unsustainable. Real income growth is cooling and dwindling excess savings are concentrated among more affluent and thriftier households.

#### Exchange rate

Dec '22 \$1 : €0.95      Dec '23 \$1 : €0.92  
Dec '22 \$1 : £0.82      Dec '23 \$1 : £0.79

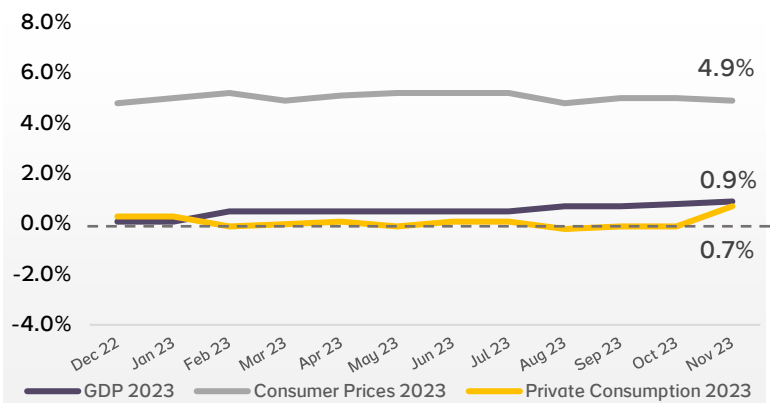


### France

The economy is showing some resilience. Consumption of both goods and services showed that households continued to spend in Q3 despite stubborn inflation. However, Oxford Economics believes this should not be taken as a sign of strong underlying growth dynamics. Oxford Economics forecasts GDP growth of +0.9% in 2023 and +0.6% in 2024.

#### Exchange rate

Dec '22 €1 : £0.86      Dec '23 €1 : £0.86

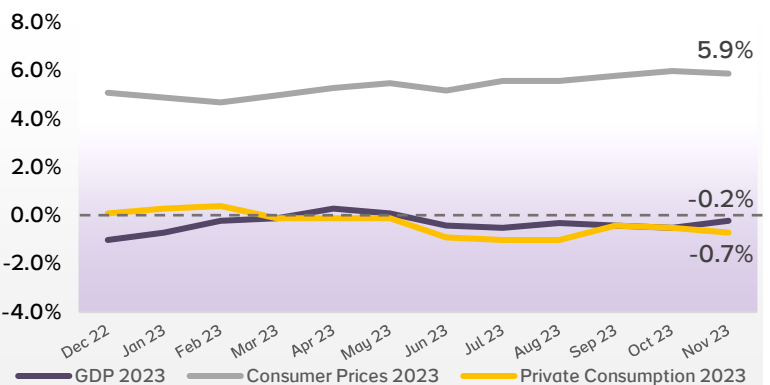


### Germany

The outlook for the German economy remains gloomy despite a stronger-than-expected performance in Q3. But this somewhat good news hasn't changed the bigger picture. Real incomes and consumer confidence remain weak. Moreover, survey data still indicates a contraction in Q4. Oxford Economics forecasts a GDP contraction of -0.2% in 2023 and just +0.2% growth in 2024.

#### Exchange rate

Dec '22 €1 : £0.86      Dec '23 €1 : £0.86

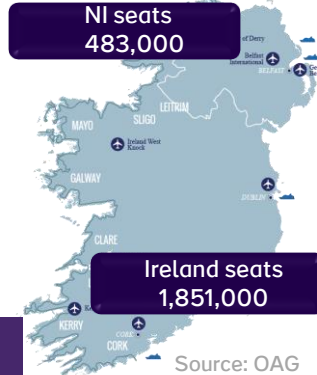
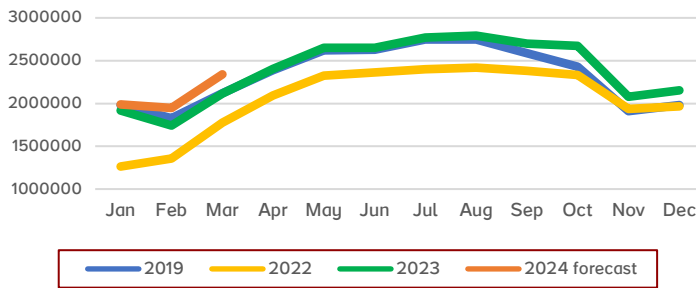


# Island of Ireland Access Situation



## March 2024 Forecast Seat Capacity

Island of Ireland Scheduled Seats

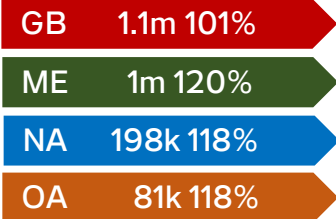


There is a very positive outlook for direct air access capacity to the island of Ireland for March 2024, with 2.3 million seats planned. Based on OAG filings, air seat capacity to Ireland is planned at 110% of March 2019 levels, with Northern Ireland scheduled at 109%.

Seat capacity to the island of Ireland for March 2024 is scheduled at 110% of the level it was in March 2019.

## Air Access March 2024 forecast – % share of 2019

### IOI Seat Capacity



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

OAG's forecast seat capacity from each of our four market areas is positive. GB (101%), Mainland Europe (120%), North America (118%) and Other Areas (118%) are all filed above March 2019 levels. Airlines are scheduled to operate over 13,700 flights in March 2024.

## Airports Forecast – March 2024

Cork and Dublin airports are scheduled to return to 123% and 108% of their respective March 2019 seat capacities. Belfast City Airport and Belfast International Airport are scheduled at 110% and 111% respectively. Shannon (146%) and Knock (112%) are scheduled above March 2019 levels, while City of Derry (65%) and Kerry (81%) are filed below.

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

Airports	Mar 2019 Seats	Mar 2024 Seats	2024 % share of 2019
Belfast Intl.	301,232	333,946	111%
Belfast City	128,601	141,622	110%
City of Derry	11,152	7,217	65%
Dublin	1,460,719	1,580,753	108%
Cork	108,601	133,075	123%
Shannon	59,988	87,329	146%
Knock	35,161	39,276	112%
Kerry	12,852	10,388	81%
Donegal	464	0	N/A
<b>Total</b>	<b>2,118,770</b>	<b>2,333,606</b>	<b>110%</b>

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

The latest performance data is for the first ten months of 2023 and shows ferry passengers to and from the island of Ireland at 95% of January-October 2019 levels. Northern Ireland passenger traffic was 102% and Ireland was 90%. Note: performance data from Spain is not available.

Ferry Passenger Traffic	Jan-Oct 2023 % share of Jan-Oct 2019
Northern Ireland	102%
Ireland	90%
Island of Ireland	95%

Ferry (both ways)	Jan - Oct 2019	Jan - Oct 2023	2023 % share of 2019
<b>GB – island of Ireland</b>			
Sailings	17,690	16,283	92%
Passengers	4,059,730	3,705,125	91%
Cars	1,019,271	1,078,376	106%
<b>France – Ireland</b>			
Sailings	635	1,096	173%
Passengers	311,358	427,335	137%
Cars	93,818	128,550	137%

## CSO Inbound Tourism

The Central Statistics Office now releases Inbound Tourism statistics, replacing the former Overseas Travel series and the 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. The CSO has advised that the Inbound Tourism series should be seen as a completely new and different statistical series, rather than a continuation or update of the Overseas Travel series and the Tourism and Travel series.

### Republic of Ireland Inbound Tourism April-October 2023

April – October 2023			
Market Area	Trips (000's)	Nights (000's)	Spend *(€m's)
Great Britain	1,529	8,327	782
Mainland Europe	1,470	13,850	1,340
North America	981	8,248	1,466
Other Areas	224	3,826	330
<b>Grand Total</b>	<b>4,202</b>	<b>34,251</b>	<b>3,917</b>

\*Spend excludes fares

For the seven months from April to October, Ireland welcomed over 4.2 million tourists generating €3.9 billion in revenue for the economy.

These overseas tourists stayed over 34 million nights in Ireland from April to October.

Source: CSO

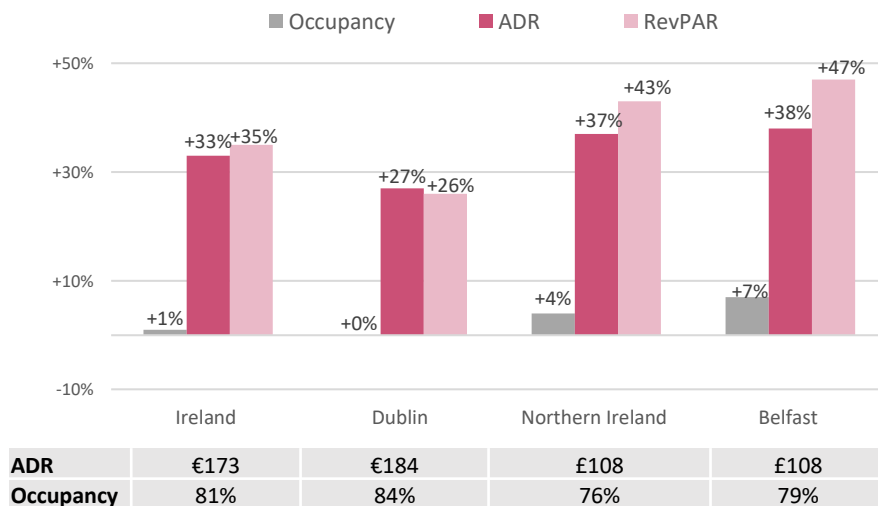
## Hotel accommodation

Latest performance data available from STR reports that hotel occupancy for January-October 2023 in Northern Ireland was 76%, up +4% on January-October 2019. In Ireland, occupancy was 81%, up +1% on January-October 2019.

The average daily rate (ADR) for a room in Northern Ireland in January-October 2023 increased by +37% to £108 and in Belfast by +38% to £108 also, when compared to the same period in 2019.

In Ireland, the average daily rate in January-October 2023 was €173, up +33% when compared to the same period in 2019. The average daily rate in Dublin for the first ten months of 2023 was €184, up +27% on January-October 2019.

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



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

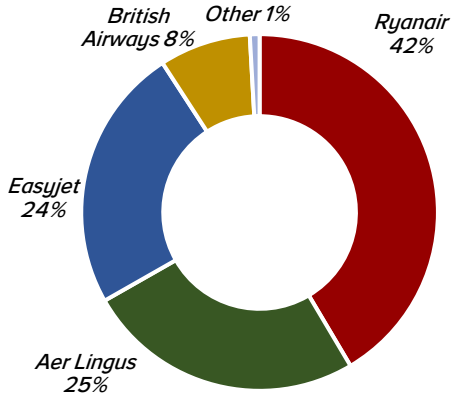
ADR = Average Daily Rate

Source: STR 2023



## Access update

### March 2024 GB to IOI forecast seat capacity



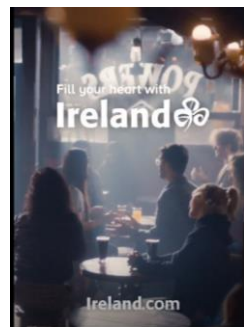
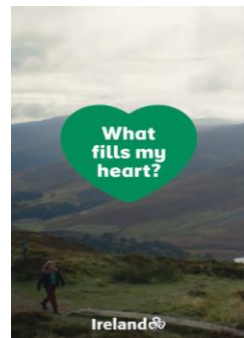
March 2024 total seats: 1.1m

## News

- Aer Lingus has introduced a new Airbus A320neo at Cork Airport to operate its service from London Heathrow. The new aircraft delivers up to 20% reduction in fuel burn and CO2 emissions per seat and close to 50% reduction in noise.
- Loganair services between Glasgow and Donegal will recommence earlier next year (from 5 April) and will increase from three per week to four per week for 2024.

## Market activity update

- **Short breaks:** a digital campaign is live promoting Belfast, Dublin, Cork and Galway as winter break destinations; it will deliver 39 million impressions (opportunities to see) on video and static placements.
- **Fill your heart with Ireland:** our brand advertising campaign will be live over the Christmas period; we will have a significant presence on TV, Broadcast Video on Demand (BVOD, in cinemas and on YouTube).
- **Partnerships focusing on city breaks:** campaigns are live with Expedia, Lastminute.com and Travelzoo, highlighting winter city breaks. Partnerships are also live with Skyscanner and TopCashback, highlighting Belfast city breaks.
- **Diaspora engagement:** includes advertising with the *Irish Post*, *Irish Voice* and *Irish World*.
- **World Travel Market:** 75 companies island of Ireland companies joined Tourism Ireland at WTM, engaging in approximately 2,800 appointments to drive business for 2024 and 2025.
- **Classic Motor Show:** six industry partners joined Tourism Ireland to promote car touring holidays on the island of Ireland to an audience of around 70,000 consumers.
- **Ireland Meets the West End:** 36 island of Ireland industry partners attended our workshop and networking event, engaging in over 700 sales appointments.
- **Travel Weekly and Group Leisure & Travel Magazine:** activity is live and includes features on Ireland's Hidden Heartlands and off-peak travel ideas.
- **Media event:** Tourism Ireland's annual media quiz took place in London, with 32 media in attendance from titles like *The Guardian*, *The Telegraph*, *National Geographic* and *TTG*. Key story hooks for 2024 were shared to generate trip ideas and coverage.
- **Press trip coverage:** recent coverage includes Northern Ireland beach sauna (#1 travel story on the weekend it was released); Wild Atlantic Way and Belfast 2024 in *National Geographic's* Cool List; and the release of the Wander Women podcast – "A journey down the River Shannon".
- **Media visits:** upcoming press trips include *Prima magazine* to cover winter wellness in Dublin, *ES Magazine* for New Year's and *Metro* for a Belfast city break.
- **Awards:** Ireland won 'Most Desirable Island Destination in Europe' at the 22<sup>nd</sup> annual Wanderlust Travel Awards, which took place in London in November.



TRAVEL WEEKLY Advertiser



Fill your heart with Ireland

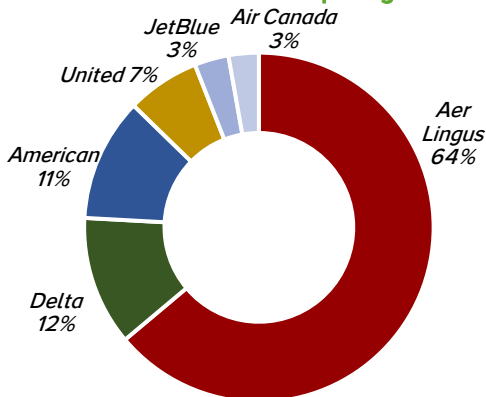
10 reasons to visit Ireland's Hidden Heartlands

With picturesque towns and villages, rolling green hills and sparkling waterways, Ireland's Hidden Heartlands is the perfect place to relax in nature and enjoy off-the-beaten-track experiences.



## Access update

### March 2024 NA to IOI forecast seat capacity



March 2024 total seats 198,000

### News

#### United States

- Direct flights from the US to the island of Ireland will operate from 18 gateway cities in 2024. New gateway cities include Denver and Minneapolis–St Paul. Both Aer Lingus and Delta will operate from Minneapolis–St Paul to Dublin, from next May.
- Aer Lingus has ended its code-sharing agreement with United Airlines; however, they are now offering an expanded programme with American Airlines, which is expected to increase passengers from key American Airlines' hubs, which include Nashville, Kansas City, Portland, Las Vegas and San Jose.

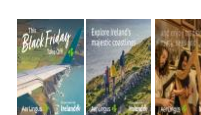
#### Canada

- WestJet has announced a seasonal Halifax to Dublin service and will increase capacity from Toronto to Dublin for 2024.

## Market activity update

### US

- **Fill your heart with Ireland campaign:** a kickstart campaign is running on digital channels and also includes four-week broadcast TV advertising. This campaign will generate 161 million+ impressions (opportunities to see), to stimulate consumer demand and strengthen travel intent for the first half of 2024.
- **Wild Atlantic Way campaign:** a three-part social video campaign highlighting the ease of access via Shannon Airport, US preclearance and experiences along the Wild Atlantic Way is live until 31 December.
- **American Automobile Association (AAA) conference:** Tourism Ireland was a destination sponsor at this conference in Rhode Island, which was attended by 150+ AAA advisors. Ireland was also awarded AAA Northeast's first-ever Destination of the Year by 250+ travel experts, who voted based on sales growth, creative and engaging marketing and destination experiences.
- **Tourism Ireland Business Events Showcase:** Tourism Ireland hosted its inaugural Business Events Showcase event in Minneapolis, with 10 island of Ireland industry partners meeting with 40+ representatives from agencies such as Prestige, BI Worldwide, Creative Group, BCD Meetings & Events, ITA Group, HB, Maritz. Aer Lingus and Delta also joined to highlight their new Minneapolis–St Paul to Dublin flights.
- **Golden Bridges Conference:** Tourism Ireland participated at this annual event in Boston, bringing together business leaders and civic officials to forge links between the Northwest and Boston and strengthen opportunities for trade, investment, tourism and education.
- **Luxury trade and media event:** Tourism Ireland shared our new 'Ireland, where Luxury comes naturally' proposition with 30 luxury travel trade and media in San Francisco.
- **Airline co-op activity:** a Black Friday campaign with Aer Lingus promoting off-season travel ran on digital and social platforms at the end of November, targeting an audience of 46 million in key US cities. A dedicated Shannon campaign with United Airlines is live on digital, social media and in print, targeting an audience of 16 million to kickstart travel from Chicago and Newark.
- **AXS Broadcast Project:** Tourism Ireland sponsored a TV documentary titled *Ireland Rocks*, about Ireland's music scene and non-peak festivals. This will air to 55 million homes across the USA on the AXS network in December.
- **New Year's Festival:** Tourism Ireland has invited US journalist Lyndsay Meyers (*Access Hollywood, Travel and Leisure*) and Emily Capiello (regular contributor to *Fodors Travel, Seventy Daily, Liquor.com, Conde Nast Traveler, Departures, Vinepair and Mashed*) to experience Dublin's New Years Festival.
- **Sound of Belfast:** Tourism Ireland partnered with Tourism NI and the Oh Yeah Music Centre in Belfast to bring journalists to the Sound of Belfast music festival and Northern Ireland Music Prize. Journalist Steve Krakow from *Chicago Reader* was invited to attend and feature showcase events at the Lyric Theatre and Oh Yeah, interview relevant festival representatives and profile Belfast as a UNESCO city of music.



## Market activity update

### US ctd.

- **Luxury agents familiarisation trip:** Tourism Ireland, in conjunction with Tourism NI and Fáilte Ireland, hosted a seven-day familiarisation trip for eight high-end travel advisors. Properties and experiences visited included Galgorm, Grand Central Hotel Belfast, Mount Juliet Estate, Adare Manor, Cashel Palace Hotel and Dromoland Castle.
- **Luxury Summit:** 14 island of Ireland industry partners participated in a four-city luxury summit, with events in Boston, Connecticut, New Jersey and New York. Partners met with 150+ leading buyers and decision-makers specialising in high-end luxury travel during the week.
- **IMEX America:** Tourism Ireland, Fáilte Ireland and Tourism NI – together with 35 island of Ireland partners – attended IMEX America, the largest trade show in the United States for the global meetings, events, and incentive travel industry.
- **Signature Travel Network Annual Conference:** Tourism Ireland attended the annual conference and hosted a boardroom presentation attended by 250+ travel advisors and met with a further 80+ advisors in a series of one-to-one meetings over two days.
- **Global Incentive Summit (GIS):** Tourism Ireland attended the Global Incentive Summit in Portugal. GIS is a hosted buyer programme for North American incentive planners and suppliers. Prior to the summit, a pre-event familiarisation trip for 10 planners took place in Ireland. Killarney will host the 2024 GIS next November.
- **Golf:** Tourism Ireland was a sponsor of the annual Invited Champions Classic Golf Tournament in Florida. The event attracted 250+ attendees with three island of Ireland industry partners also in attendance; activity included an Irish-themed event.



### Canada

- **Fill your heart with Ireland campaign:** our brand campaign will run until the end of the year on digital and social channels, delivering 110 million+ impressions (opportunities to see).
- **Tourism Ireland Business Events Showcase:** Tourism Ireland facilitated six island of Ireland industry to connect with 20+ representatives from organisations including SunLife, Wynford, BCD Meetings + Events and Helmer Management Group – highlighting the island of Ireland's product, proximity and unique selling points for business and incentive travel.
- **European Travel Commission (ETC) and CATO Event:** the ETC and the Canadian Association of Travel Agents (CATO) hosted an inaugural partnership event attended by 130 trade and media, featuring a destination update, Irish music and whiskey/gin tastings.
- **Airline co-op:** a Black Friday campaign with Aer Lingus promoting off-season travel from Toronto to Ireland ran on digital and social platforms at the end of November.



### Australia

- **Fill your heart with Ireland campaign:** our brand campaign continues and will run until the end of the year on digital and social channels.
- **Partnership programme:** partnering with tour operators in Australia and the island of Ireland to promote their offers; activity is now live on channels including Meta, Kayak and TripAdvisor and also includes email marketing.
- **Luxperience:** Tourism Ireland attended a four-day luxury event in Sydney, meeting with approximately 60 agents via one2one appointments and showcasing all that the island of Ireland has to offer the luxury traveller.
- **Trade co-op:** campaigns with tour operators Trafalgar and Globus will conclude in December; activity has run on a mix of channels including digital.
- **Media visit:** seven journalists visited the island of Ireland in November. The itinerary included The Saint Patrick Centre, Hillsborough Castle and Gardens and Armagh Robinson Library. They also experienced a foraging session in Strandhill, the Connacht Distillery and a cycle along the Great Western Greenway and visited Kylemore Abbey, the Burren Smokehouse, Cliffs of Moher and King John's Castle.



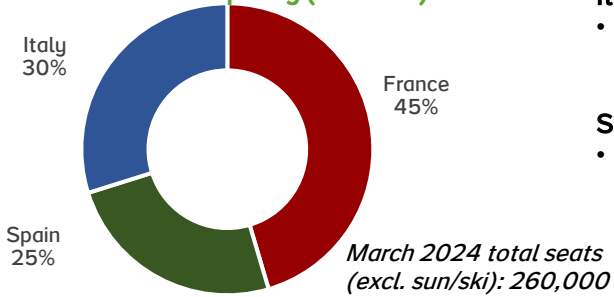


# Southern Europe – France, Italy and Spain



## Access update – Southern Europe

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



### News

#### Italy:

- A new Ryanair winter service from Turin to Belfast will commence on 1 January 2024 and will run until the end of March.

#### Spain:

- Ryanair is operating two new routes from Barcelona and Seville to Cork this winter, with two weekly flights on each route.

## Market activity update

### France

- Kickstart campaign:** running until 31 December. It includes sponsorship of programmes on two leading TV channels, cinema advertising in two of the biggest French networks in the greater Paris region and key cities with direct access to the island of Ireland, as well as a digital campaign on YouTube.
- Sud Radio:** 4 x 15-minute interviews with Tourism Ireland and industry partners (Wicklow Tourism and Tracey's Farmhouse Kitchen) in December, to promote winter travel to the island of Ireland.
- Carrier co-op:** includes activity with Stena Line to stimulate bookings for Q4 and next year; and with Ryanair to promote its new Paris Beauvais to Cork service.
- Partnership activity:** includes partnerships with Odigeo and Perfectstay, to drive demand during Christmas and winter and encourage longer stays and visits to our regions and Northern Ireland.
- Business events:** in Toulouse and Lyon showcasing our MICE offering, with three island of Ireland partners and key French buyers.
- Slow Tourism in NI webinar:** Donna Fox Tours and Tracey's Farmhouse Kitchen showcased responsible activities to mitigate carbon footprint; approximately 100 attendees.

### Italy

- Fill your heart with Ireland campaign:** a campaign promoting off-season travel to Belfast, Dublin, Cork and Galway has just concluded, generating 51 million opportunities to see and over 37,000 visits to Ireland.com. Our kickstart campaign is live and includes digital activity and outdoor ads in key areas of Milan.
- Co-op activity:** a campaign with Logitravel to drive winter bookings and promote direct access to Cork and the Wild Atlantic Way has just concluded.
- Ecoluxury fair:** a two-day B2B workshop in Rome presenting the island of Ireland as a luxury destination with a focus on sustainability; partners included Hastings Hotels and Adams & Butler. Event included a speech on 'Sustainable Ireland' at an Ecoluxury forum with media and trade.
- Trade activity:** 15 key Italian agents took part in a familiarisation trip to Cork, Waterford and Dublin.
- Media visit:** Five journalists visited Wild Atlantic Way and sustainable industry partners.
- Media event:** we partnered with BIM Distribution for the launch of a cartoon movie from Roddy Doyle book's *A greyhound of a girl* which is entirely set in Ireland.

### Spain

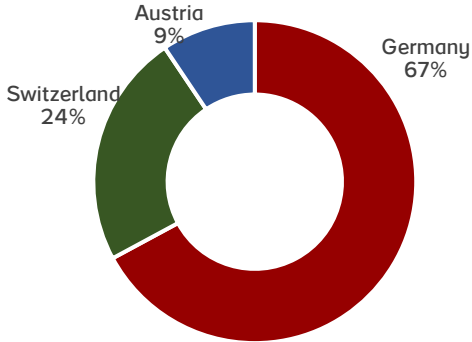
- Branded entertainment 'The Craic Show':** with Movistar Plus+ (largest Spanish subscription digital TV platform) is live with well-known celebrities, positioning the island of Ireland as 'must visit' destination for 2024 and with an extensive media and publicity push.
- Ryanair co-op:** geo-targeted digital campaign in Catalonia in December, promoting the new Barcelona to Cork flight via programmatic display (20 million opportunities to see) and Ryanair channels including email marketing and banner ads.
- Nautalia Viajes co-op:** is live, promoting short breaks and also encouraging longer stays. Extensive activity on digital outdoor, radio and display and via the travel agency network.
- Fill your heart with Ireland:** a digital campaign highlighting Wild Atlantic Way and Ireland's Ancient East influencer and video content is live on Meta, promoting ease of access and driving





## Access update

### March 2024 Germany, Austria Switzerland forecast seat capacity



March 2024 total seats: 148,000

## News

### Germany:

- Air seat capacity between Germany and the island of Ireland has not recovered to 2019 levels. Seats in 2023 averaged 77% of 2019 levels.

## Market activity update

### Germany

- **Fill your heart with Ireland:** phase three of the campaign ran mainly on programmatic video and display, Spotify, as well as on social media, generating over 66 million impressions (opportunities to see).
- **Activities campaign:** this campaign on Connected TV, which ran at the same time as phase 3 of the brand campaign, highlighted outdoor activities on the island of Ireland.
- **DRV Ireland destination special:** 60 travel agents spent five days on the island of Ireland exploring our regions and exploring opportunities for growth at a conference in Druids Glen. Significant social media coverage was generated by the travel agents direct to their consumers clients during the trip.
- **Ireland Meets Germany:** 19 trade partners and 29 industry from the island of Ireland attended the B2B event in Frankfurt.
- **YouTube campaign:** new video starring German golf pro Marcel Siem running on YouTube, targeting golf and luxury audiences. The campaign generated 1 million opportunities to see and there were 340,000 completed video views.
- **MII workshop:** 11 industry from the island of Ireland met with 40 key German MICE buyers from Munich and its surrounding area.
- **MII familiarisation trip:** 12 German trade buyers took part in a four-day familiarisation trip to Dublin, Kildare, Galway and Clare in November.
- **Media trips:** 12 individual media familiarisation trips for Halloween and Wexford Festival Opera, as well as one group trip (focused on our food offering), took place in November.
- **Influencer trip:** actress and celebrity Olivia Marei travelled along the east coast in December.

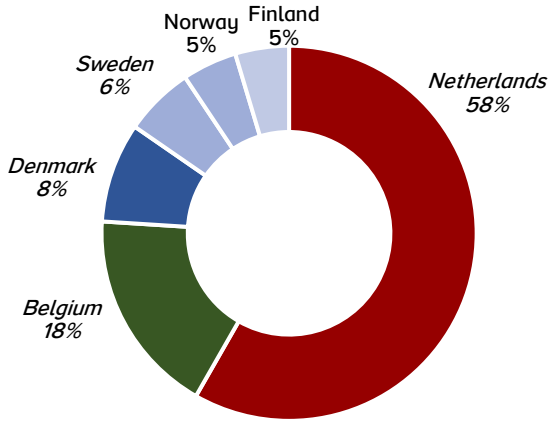
### Austria and Switzerland

- **Partnership activity:** a campaign is live with Expedia, promoting Cork and Northern Ireland in Switzerland.
- **Media advertorial:** *Edelweiss Experience* magazine advertorial with Cork Airport and Visit Cork in December.
- **Coast and Glamping:** campaign focusing on coast and glamping in Switzerland, in December.
- **Content seeding:** paid content seeding campaign is under way in Austria, highlighting our gardens in spring.
- **Partner activity:** with specialist tour operator in Austria with a focus on classical music.



## Access update

### March 2024 Northern Europe to IOI forecast seat capacity



March 2024 total seats: 152,000

### News

#### Netherlands, Belgium and the Nordics

- Overall air seat capacity from the Netherlands, Belgium and the Nordics to the island of Ireland for March 2024 will be above March 2019 levels.

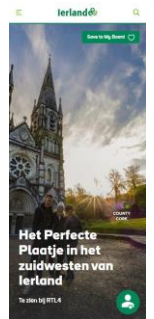
## Market activity update

### Netherlands and Belgium

- **Het Perfecte Plaatje:** a popular Dutch TV competition featuring celebrities showcasing their photography skills had its grand finale episodes filmed in Cork and surrounding region. The episodes are expected to be viewed by over 1 million people in December.
- **Billboard TV ads:** to coincide with the broadcast, Tourism Ireland ran billboard TV ads and a paid promotion on META, offering a chance to win a five-day trip to Cork and region.
- **Off-season campaign:** a short breaks campaign was live in the Netherlands and in Flanders (Belgium); it involved programmatic advertising and advertising on social channels, promoting Dublin and Belfast as attractive options for autumn and winter city breaks. The campaign delivered 22 million impressions (opportunities to see).
- **Partnerships:** a partnership with tour operator ANWB Reizen (Royal Dutch Touring Club) to boost sales of their spring 2024 island of Ireland packages involved advertising on Facebook, newsletters and a two-page advertorial in *Spotta* magazine (1 million circulation).
- **Digital co-op:** a campaign is live promoting TradFest, to attract Dutch visitors to attend the event in early 2024.
- **Media meetings:** meetings will take place with chief editors of tier one media outlets in the Netherlands and Belgium in the lead-up to Christmas, to help agree on target publications for 2024 and 2025.

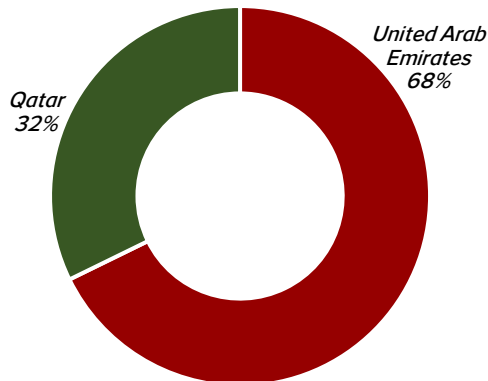
### Nordics

- **Off-season city breaks:** activity is live on Meta, promoting Dublin and Belfast in Sweden and Denmark.
- **Influencer trips:** four influencers will visit Belfast and Dublin, as part of our city breaks activity.
- **Travel News Market:** Tourism Ireland and six industry partners from the island of Ireland attended Travel News Market in Stockholm, the leading B2B travel event in Sweden.
- **OTA activity:** partnerships are live with Tryp.com, Etraveli, Kayak and Momondo, promoting off-season city breaks to Belfast and Dublin.
- **Digital co-op:** a campaign is live with TradFest, promoting the 2024 festival to Nordic audiences.
- **Golf co-op:** activity is currently live with Swedish golf operator Here We Go, promoting golf trips to the island of Ireland in Q4 2023 and Q1 2024.



## Access update

### March 2024 Emerging Markets forecast seat capacity



March 2024 total seats: 49,000

### News

#### Middle East:

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

## Market activity update

### Global Inbound

- **Global European Marketplace (GEM):** B2B workshop in London run by ETOA, offering opportunities to meet influential global and European buyers, which was attended by 41 island of Ireland industry partners.
- **Miki Travel newsletter series:** during 2023, four newsletters were distributed via Miki Travel to travel trade in South-East Asia. They highlighted signature attractions, historic monuments, food and drink and Irish culture.
- **Partnership with Kuoni Tumlär:** a final island of Ireland newsletter was distributed, ending our 2023 campaign, highlighting sustainable and luxury travel, which were core themes throughout the collaboration.

### Middle East

- **Ireland Golf Day:** with industry partners – Sullivan Golf Travel and G Golf Ireland – in Dubai, to launch their island of Ireland golf packages for 2024.
- **Golf event:** Tourism Ireland had a stand at the DP World Tour Championship with industry partners Executive Helicopters and Activities Ireland. The focus was on promoting our world-class golf, The Open in Royal Portrush and the Ryder Cup in Adare Manor.
- **Golf media:** a feature article and ad ran in the December issue of *Golf Digest Middle East* to promote dnata Travel's golf packages to the island of Ireland in 2024.
- **Media visit:** a recent media familiarisation trip by *FACT magazine* visited the Causeway Coastal Route, Belfast, Kildare and Dublin.
- **Media coverage:** an eight-page full colour feature in the November issue of *Vogue Arabia* (monthly circulation of 60,000) focused on luxury travel. There was also a ten-page full colour feature article on the island of Ireland in the November issue of *Laha Magazine*, which has a monthly circulation of 140,000 across the MENA region.

### China and India

- **China awards:** Ireland was named Best Golf Destination 2024 by World Leisure Awards; and Best Honeymoon Destination 2024 by the Best Bang Awards.
- **China Workshop:** Tourism Ireland and Titanic Belfast joined VisitBritain for a three-day B2B China Workshop in Shanghai, in November.
- **Tánaiste visit:** Tánaiste Micheál Martin visited China on 6-9 November. Tourism Ireland invited business partners to engage in programmes in Beijing and Shanghai. In Shanghai, the Tánaiste formally opened the new Ireland House.



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*This report has been produced with available data up until 8 December 2023. 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.*