

SOAR

(Situation & Outlook Analysis Report)

April 2022



The impact of the conflict in Ukraine has been felt immediately in Europe and around the world. The effects have included higher energy prices, trade sanctions, supply chain disruptions, financial market shocks and a decline in disposable income and consumer confidence.

After two years of disrupted travel due to COVID-19, airlines and the global tourism industry are once again bracing themselves for more uncertainty.

Air access data from OAG shows air seat capacity to the island of Ireland is expected to be 88% of the level seen in April 2019. The access situation remains volatile and future schedules will heavily depend on the COVID-19 situation, both on the island of Ireland and in our source markets, and any implications of the unfolding situation in Ukraine. The sanctions on Russia are having a major upward impact on fuel prices; and aviation fuel is one of the main influencers on flight and ferry prices which is directly linked to tourism demand.

Latest data from the CSO reported a total of 787,000 arrivals to air and sea ports in the Republic of Ireland during the month of February (this includes residents of the Republic of Ireland and Northern Ireland as well as overseas visitors).

STR reports that hotel occupancy on the island of Ireland was down by -27% for the first two months of 2022 when compared with the same period in 2019.

Tourism Ireland's St Patrick's Day activities included an extensive programme of trade, media and consumer activity to restart overseas tourism.

The aim of the programme was to remind holidaymakers everywhere that the island of Ireland offers the warmest of welcomes and great fun, as well as wonderful scenery and heritage.

As part of the latest iteration of the Green Button campaign which launched in 2021, Tourism Ireland created the Green Button Festival. On St Patrick's Day, the Green Button Festival brought artists performing at various locations around the island of Ireland to an audience of prospective holidaymakers around the world – encouraging them to come and experience the destination for themselves. Meanwhile, our Northern Ireland Embrace a Giant Spirit campaign ran during Q1 2022, with advertising activity reaching 44 million adults in Great Britain.

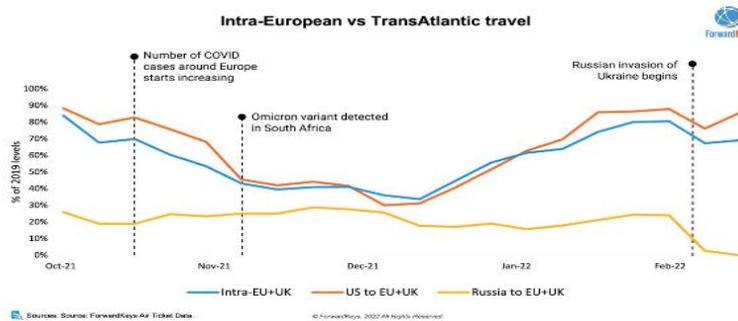




Over three million extra seats are scheduled this week (w/c 28 March) in Western Europe, which is a +20% increase in capacity since last week. According to OAG, this bodes well for the summer season and a strong recovery is expected for Western Europe, particularly amongst the low-cost airlines. Ryanair is now the world's fourth-largest airline and it has added +27% more capacity, or 3.6 million seats, week-on-week. easyJet has increased its seat capacity by +31% week on week.



Research conducted by ForwardKeys revealed that Russia's invasion of Ukraine caused an immediate stall in flight bookings to Europe. However, after only three weeks into the conflict, transatlantic travel to Europe has bounced back. Intra-European travel is holding up and bookings for the Easter and summer holidays keep growing. ForwardKeys has indicated that there is still pent-up demand, but there is a need to be cautious.



World Travel & Tourism Council, the Airports Council International Europe and International Air Transport have called for an end to all pandemic measures. Although most countries have relaxed requirements to present proof of vaccination and wear masks, the patchwork of the remaining COVID-19 restrictions has continued to impact on overall travel and the global tourism industry.



Following discussions with member states' public health experts, on 29 March, the European Commission has adopted new rules on the European Union Digital Covid Certificate. They are now exempting people under the age of 18 from the acceptance period of 270 days for vaccination documents following the primary vaccination series. Therefore, the standard period will be limited to people aged 18 and over. According to the announcement, the exemption of minors will be implemented at the verification level by adapting the mobile applications which are used to verify the EU Digital COVID Certificate.



Jet fuel prices have risen significantly since the start of the crisis in Ukraine. Upward pressures on prices will continue, in particular if more stringent sanctions were to be applied to the Russian energy sector. All airlines that have some unhedged fuel demand will be directly impacted. Airlines may pass the higher fuel costs on to passengers through higher air fares. At a time of already elevated inflation, higher air fares could reduce demand for air travel.



A recent survey in the US by travel marketing agency MMGY has suggested that the war in Ukraine is causing many US tourists to have second thoughts about planned trips to Europe this year. It found that 31% of those surveyed cited worries over COVID-19 as a concern that might influence their travel plans. But double this number, 62%, cited concerns over the war spreading to other European countries.

Economic Conditions



Great Britain

The prospect of much higher inflation and more aggressive tightening of monetary policy has led Oxford Economics to cut its GDP forecast for 2022 to 3.7% from 4.5% in January. The conflict in Ukraine has pushed up commodity prices and it now expects inflation to peak above 8% in April. The squeeze on household spending power raises the risks of an abrupt slowdown in growth.

Exchange rate

Mar '21 £1 : €1.16 Mar '22 £1 : €1.19

US

The US economy is still displaying solid economic momentum; however, it now faces shifting headwinds. The Omicron wave has been largely contained but higher inflation and greater uncertainty triggered by the conflict in Ukraine have emerged as key risks. Oxford Economics anticipates GDP will grow by +3.4% this year and slow to +2.1% in 2023, but risks are tilted to the downside given the intensifying inflation shock.

Exchange rate

Mar '21 \$1 : €0.84 Mar '22 \$1 : €0.90
 Mar '21 \$1 : £0.72 Mar '22 \$1 : £0.76

France

Oxford Economics has said that the conflict in Ukraine, raw material supply problems and spiking oil and gas prices will have a negative impact on the French economy. The French government announced on 16 March an adaptable "resilience plan" that will help cushion the economic impact for firms. Results from a recent consumer confidence survey showed that households are expecting a sharp drop in standards of living and a sharp increase in inflation.

Exchange rate

Mar '21 €1 : £0.86 Mar '22 €1 : £0.84

Germany

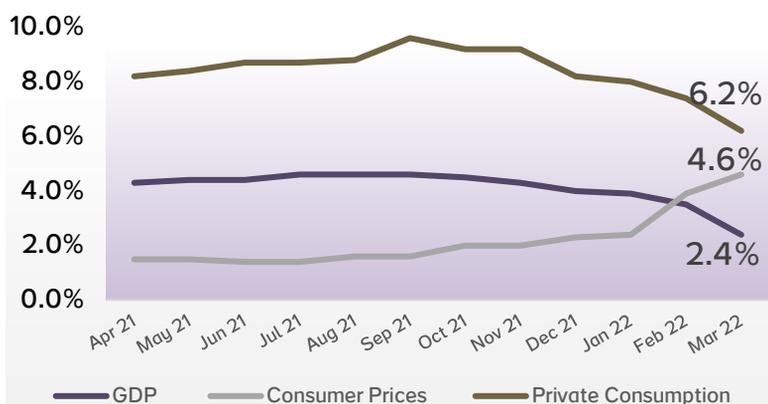
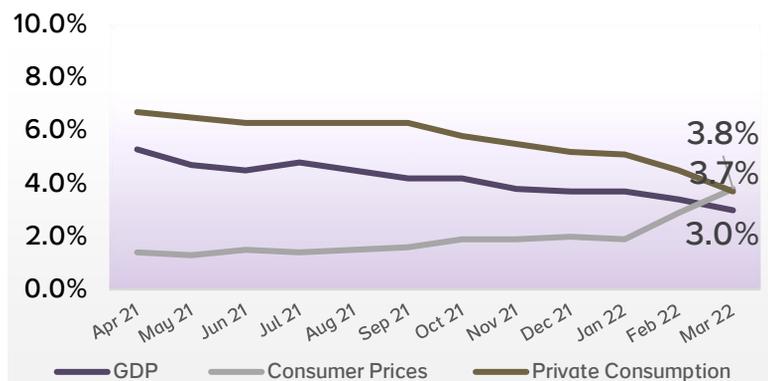
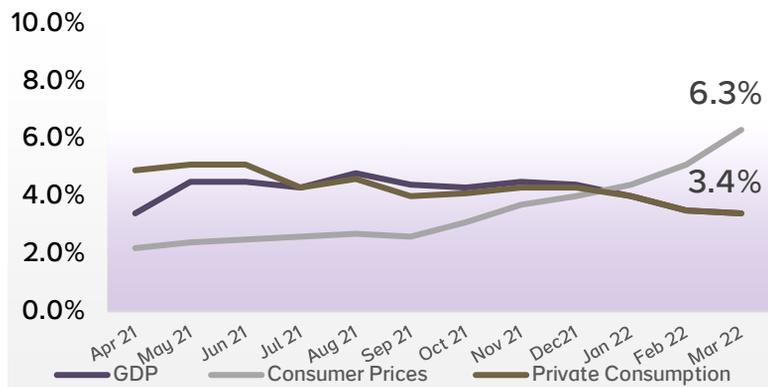
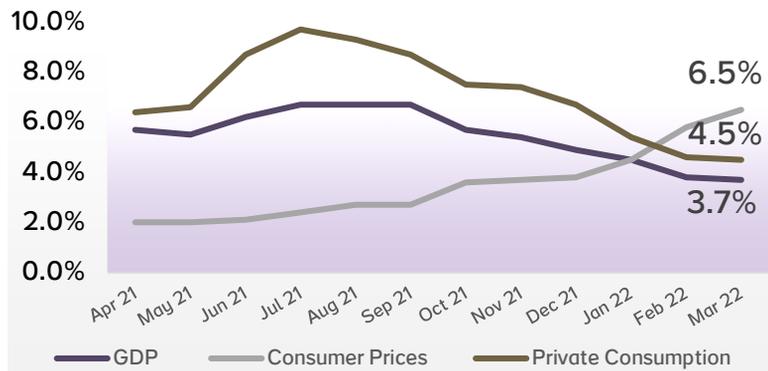
The conflict in Ukraine will materially undermine the German economy this year. Increase in energy prices and high inflation will dent consumer confidence. New supply disruptions are also set to constrain industrial production, at least in the near-term. Oxford Economics now expects GDP growth of +2.4% in 2022, down from +3.5% last month.

Exchange rate

Mar '21 €1 : £0.86 Mar '22 €1 : £0.84

2022 Economic Outlook by Oxford Economics trended each month

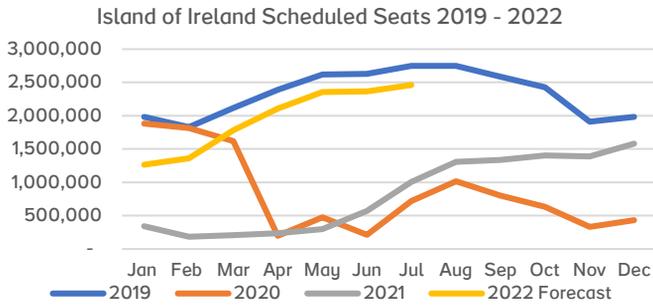
Source: Oxford Economics



Island of Ireland Access Situation



April Seat Capacity Forecast



Seat capacity to the island of Ireland will be at 88% of the level it was in April 2019.



Based on current data from OAG, scheduled air seat capacity to Ireland is scheduled to return to 92% of April 2019 levels, with Northern Ireland scheduled at 70%.

April Air Access - 2022 % share of 2019

IOI Seat Capacity



IOI seats 2,105,113 88%
Flights 12,132 83%
Airports 167 98%
Airlines 47 85%

Seat capacity from Mainland Europe is expected to return to 95% of April 2019 levels. Airport connectivity has bounced back to nearly 2019 levels. The top 10 airlines will account for 88% of all seats to the island of Ireland in April 2022.

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

April Airports Outlook

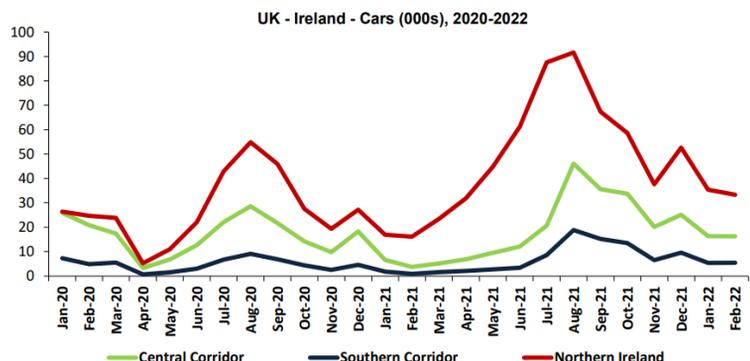
Dublin and Cork airports are scheduled to return to 91% and 99% of their seat capacity level experienced in 2019 respectively. Belfast International is scheduled to return to 80% of its capacity this April. Belfast City Airport is scheduled to experience the greatest decline in seats this April. The access situation remains volatile and schedules will depend heavily on the COVID-19 situation in our source markets and any implications of the unfolding situation in the Ukraine.

Airports	April Seats 2019	April Seats 2022	2022 % share of 2019
Belfast Inter.	321,551	256,243	80%
Belfast City	141,458	69,293	49%
City of Derry	10,107	7,721	76%
Dublin	1,652,732	1,502,753	91%
Cork	127,087	126,068	99%
Shannon	75,780	81,931	108%
Knock	44,444	44,850	101%
Kerry	16,065	16,254	101%
Donegal	693		0%
Total	2,389,917	2,105,113	88%

Ferry Performance 2021 v 2019

The number of cars travelling on ferries to the island of Ireland from GB for the YTD to February is nearly back to 2019 levels. Traffic to Northern Ireland is now 133% of 2019 levels; however, car traffic to Ireland (central and southern corridors) is at only 69% of 2019 levels. There is no data available on car traffic to the island of Ireland from continental Europe at present.

Car Ferry Traffic	Jan-Feb 2022 % share of 2019
Northern corridor	113%
Central corridor	69%
Southern corridor	73%
Total	98%

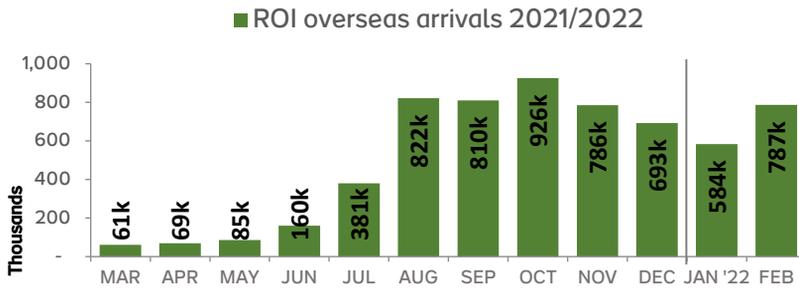


Performance to date

Republic of Ireland Overseas Arrivals

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

ROI OVERSEAS ARRIVALS 2022 VS. 2019



ROI OVERSEAS ARRIVALS
LATEST FEB 2022: **755k -34%**
YTD JAN-FEB 2022: **1.3m -43%**



ROI OVERSEAS ARRIVALS
LATEST FEB 2022: **33k -27%**
YTD JAN-FEB 2022: **53k -36%**

Republic of Ireland overseas arrivals January-February 2022

Main market area	Jan-Feb 2022 (000's)	% change '22/'19
Great Britain	483	-53%
Mainland Europe	652	-41%
North America	78	-57%
Rest of the world	47	-47%
Total Overseas	1,371	-43%

The CSO reported a total of 787,000 overseas arrivals into air and sea ports in the Republic of Ireland during February 2022 (this includes residents of the Republic of Ireland and Northern Ireland).

This represents a -34% decrease on February 2019.

Source: CSO

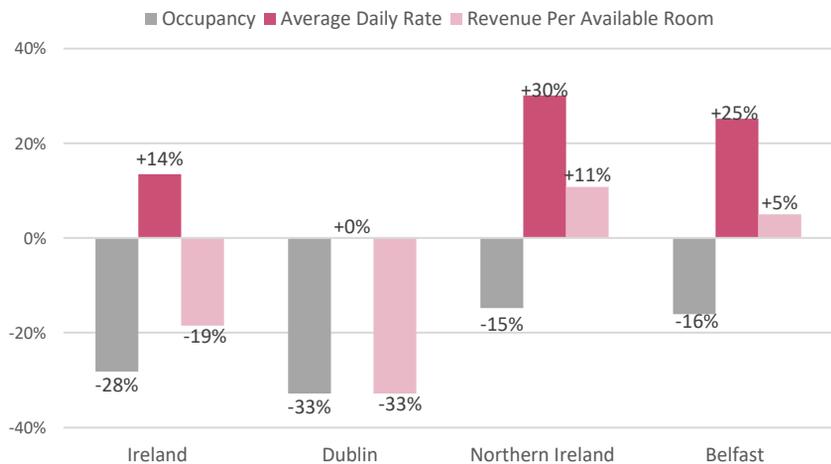
Hotel accommodation

Latest performance data from STR reports that hotel occupancy in Northern Ireland was down by -15% in January-February 2022 when compared with the same period in 2019. In Ireland, occupancy for the first two months of 2022 was down -28% on January-February 2019 levels.

The average daily rate for a room in Northern Ireland in the first two months of 2022 increased by +30% to £87 and in Belfast by +25% to £83, when compared to the same period in 2019.

In Ireland, the average daily rate was up +14% to €119 in January-February 2022, when compared to same period in 2019. The average daily rate in Dublin for the first two months of 2022 was €117, on a par with the same two months in 2019.

Island of Ireland hotel performance Jan-Feb 2022/Jan-Feb 2019 % change



ADR	€119	€117	£87	£83
Occupancy	45%	47%	50%	49%

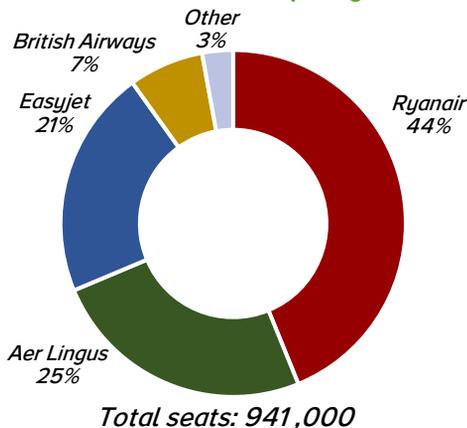
Note: Data include residents from the Republic of Ireland and Northern Ireland

ADR = Average Daily Rate

Source: STR March 2022

Access update

2022 July GB to IOI forecast seat capacity

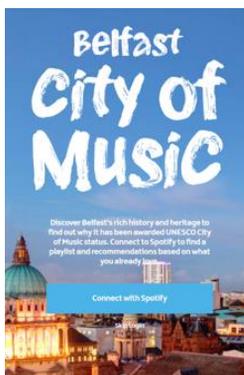


News

- From March 2022, Emerald Airlines (operator of Aer Lingus Regional) will commence new services from Birmingham, Edinburgh, Leeds Bradford, Manchester, Glasgow and Exeter.
- Aer Lingus and British Airways services from London Heathrow and London City to Belfast remain unchanged.
- Flybe has announced new routes that will commence in April to Belfast City Airport from London Heathrow, Glasgow, Birmingham and Leeds Bradford.
- Ryanair will expand and add new routes to Cork in 2022 including from Manchester, Birmingham and Edinburgh.
- Loganair and BA have increased their codeshare agreement, meaning access to routes such as Aberdeen to Belfast City and London and Liverpool to City of Derry can be booked directly via BA.com, as onward connections or point-to-point flights.

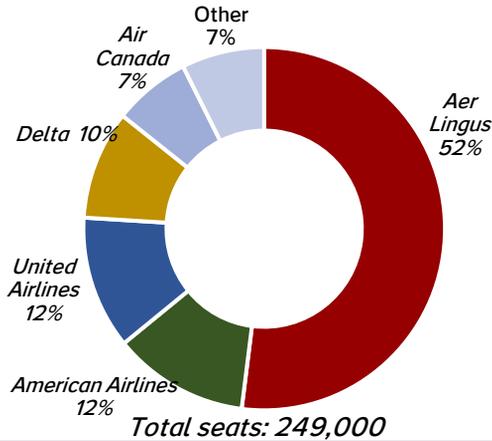
Market activity update

- Our Green Button / Northern Ireland Embrace a Giant Spirit campaign ran during Q1 2022, with advertising reaching 44 million adults in Great Britain. The campaign included TV, BVOD (broadcast video-on-demand) and out-of-home ads, a Spotify media partnership, joint partner and access marketing, trade communications, digital, social and publicity activity.
- An extensive, multi-media Green Button campaign promoting the island of Ireland is live during March and April and will reach 47 million people in Great Britain. The campaign includes TV advertising, digital and social ads, out-of-home ads, co-operative promotions with trade and access partners, trade promotions and a full publicity programme.
- Live trade, consumer and advertising promotions leveraging St Patrick's Day (SPD) and the Green Button Festival took place at venues in Glasgow, Edinburgh and London, including at Twickenham Stadium (during the England-Ireland Guinness Six Nations rugby game). SPD activity was supported by trade communications, influencer and media outreach and digital activity.
- Journalists from *The Scotsman*, *The Sunday Post* and *Times Literary Review* have visited Northern Ireland; and key travel influencers attended a Dublin St Patrick's Day press trip.
- A Northern Ireland showcase event for 30 GB media took place in March to highlight new stories including Belfast UNESCO City of Music and Game of Thrones Studio Tour.
- *National Geographic Traveller* included a 10-page Ireland's Ancient East feature in March.
- A MICE workshop took place in March, with 25 island of Ireland industry meeting with key GB buyers.
- A new co-operative partnership was launched with holiday publisher Holidaypirates, to promote great holidays and deals to the island of Ireland.
- Co-operative campaigns were live in March with Aer Lingus, easyJet, Loganair, Ryanair and Stena Line – designed to promote ease of access and drive 2022 bookings.
- A tactical partnership is live with online metasearch platform Skyscanner promoting access to Northern Ireland.



Access update

2022 July NA to IOI forecast seat capacity



News

- **USA:** Aer Lingus flights from San Francisco to Dublin resumed at the end of February and returned to a daily schedule on 26 March. Los Angeles to Dublin recommences daily on 12 May and Seattle to Dublin returns five times a week on 26 May. Aer Lingus resumed flights to Shannon from Boston on 10 March and from JFK on 11 March.
- American Airlines will recommence Dublin flights from Charlotte, Dallas and Chicago on 6 May.
- **Canada:** Air Canada announced the restoration of its seasonal Dublin to Montreal route, launching 2 June.
- **Australia:** Effective 1 March 2022, Emirates increased capacity on its Brisbane to Dubai route to a daily service and re-introduced its flagship Airbus A380, resulting in approximately 3,000 additional seats per week for both inbound and outbound travellers.

Market activity update

USA:

- The Green Button campaign went live on 21 February in key gateway cities and priority areas. The campaign is running across multiple channels and includes always-on digital activity and strategic bursts of TV on major networks and leading streaming services. It has a strong tactical element to turn 'lookers' into 'bookers' and presents attractive vacation packages to potential travellers via leading travel deals websites. There will be 360 offer placement opportunities throughout 2022. The campaign will deliver over 600 million impressions in 2022 and reach 92 million Americans.
- Tourism Ireland hosted an Ireland for IMAX® premier event in New York on 2 March, with 100 key trade, airline and media contacts in attendance.
- The Diaspora Advocacy Programme targeting the all-important Irish American audience started in March. This includes promotions in key diaspora print, radio and online media outlets, such as IrishCentral.com, Irish Radio Network, *Irish Voice*, *The Irish Herald* and *The Irish Echo*.
- Tourism Ireland attended the Travel and Adventure consumer shows in Boston on 5-6 March and in Los Angeles on 12-13 March, with three partners at each event.
- Our sponsorship of the Riverdance 25th Anniversary Tour in the US and Canada kicked off in early March; it includes a digital and social campaign with a 90-second promotional video. It will play in 40 cities (120 performances reaching 300,000+ people). In partnership with the Embassy of Ireland and Riverdance, Tourism Ireland hosted a VIP reception on 15 March for 100 guests at the Kennedy Center in Washington, DC. The event was attended by the Taoiseach.
- Two live TV satellite media tours took place on 16 and 17 March, highlighting the St Patrick's Day Festival from Dublin and Limerick via over 40 stations in key cities across the USA.
- QVC, the US shopping channel with over 110 million subscribers, conducted a live 24-hour broadcast on St Patrick's Day from Slane Castle.
- Celebrity chef Donal Skehan highlighted contemporary culinary messages on morning TV show appearances on St Patrick's Day.



Market activity update

Canada:

- Our Green Button campaign went live on 1 March across the priority provinces of Ontario, British Columbia and Alberta. The digital campaign incorporates Connected TV placements, social media, display advertising on premium sites such as Condé Nast, Globe and Mail and BBC, as well as a tactical partnership with Travelzoo. The campaign will deliver over 65 million impressions in H1 2022.
- Co-operative marketing campaigns with airlines and tour operators were activated in March to drive immediate bookings.
- A radio campaign with a leading Canadian operator and Titanic Belfast took place to celebrate the 10th anniversary of Titanic in March.
- A Northern Ireland golf advertising campaign took place in March with partners including Merit Travel and Score Golf.
- Tourism Ireland sponsored Celticfest in Vancouver on 9-21 March, in partnership with Air Canada to promote its direct Vancouver-Dublin service launching in June.
- Four virtual events with Canadian travel advisors and consumers took place from 7 to 17 March, promoting the Green Button campaign and the return of travel to the island of Ireland without restrictions.
- St Patrick's Day publicity activity included media events highlighting the Green Button Festival with 40 key media partners in Toronto. Food and drink on the island of Ireland was highlighted on the national breakfast television show *Global News Morning* Celebrity chef Kevin Dundon demonstrated St Patrick's Day recipes on breakfast TV show called *Your Morning* on 17 March.
- Tourism Ireland captured footage in downtown Toronto to create a short video with a synchronised ice-skating troupe skating in the shape of a shamrock to mark St Patrick's Day in an iconic location in Canada.
- The Toronto Irish Film Festival, sponsored by Tourism Ireland, took place in cities across Ontario, including Picton and Toronto, from 14 – 25 March, with dedicated screenings of Irish films featuring Green Button advertising.

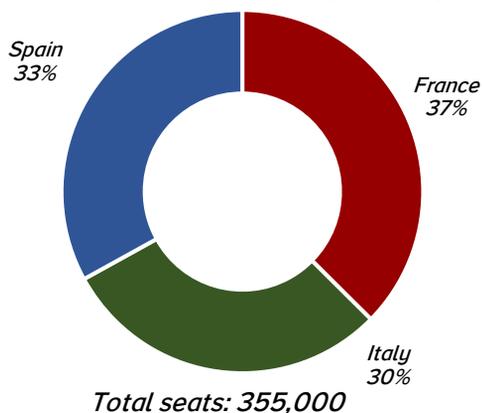
Australia:

- A luxury virtual expo took place on 10 March, with 23 Irish industry partners meeting with 50 travel agents from Australia and New Zealand via one-to-one video appointments.
- A St Patrick's Day trade and media lunch was held on 15 March to promote the Green Button campaign and return of travel to Ireland.
- The Green Button Festival took place in Sydney on 17 March and the festival was also promoted across social media channels.
- One of Australia's largest national broadsheets, published by New Corp (print and online), attended the St Patrick's Festival in Dublin before exploring Cork.
- Tourism Ireland arranged for a show called *Ireland in Music* to air on St Patrick's Day on SBS TV, Australia's public service broadcaster. Produced by Temple Bar TradFest, the show was first broadcast on RTÉ One and features a number of Irish-based musicians performing in locations around Ireland – highlighting our rich culture and our spectacular scenery.



Access update – Southern Europe

2022 July Southern Europe
forecast seat capacity (excl. sun)



News

France: Air access in France is scheduled to return to 90% of 2019 levels. There are expected to be almost 50 direct weekly ferry crossings between France and the island of Ireland.

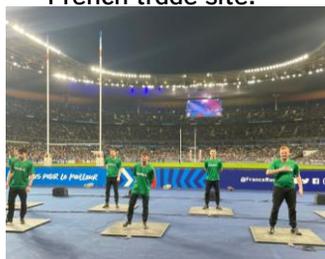
Italy: Ryanair has announced plans to increase its overall fleet in Italy from 67 to 92 aircraft by the summer and intends to invest €2.5 billion establishing 17 additional European routes via Roma Fiumicino. New Cork routes announced include Alghero and Pisa.

Spain: Aer Lingus is increasing capacity on routes from Bilbao and Barcelona to Dublin.

Market activity update

France:

- The Green Button campaign continued throughout March across traditional TV, Connected TV, digital out of home (DOOH) and digital platforms.
- As part of the extensive St Patrick's week programme of activities, the Green Button Festival Kíla was live streamed in the Irish Cultural Centre on 17 March.
- To capitalise on the Six Nations rugby game between Ireland and France, a trade and media event took place in Paris to launch the Green Button campaign. During the game, a publicity stunt was carried out with Cairde, which generated strong media coverage. This resulted in five TV reports and a half-time show at Stade de France to an audience of 80,000.
- Our Northern Ireland Green Button / Embrace a Giant Spirit campaign ran until the end of March across TV, Connected TV, DOOH, social media and programmatic display, promoting direct flights to Belfast. It also included partnerships with online travel agents (OTAs) Travelzoo and Odigeo, promoting packages to Northern Ireland.
- Tourism Ireland collaborated with Titanic Belfast to celebrate its 10th anniversary in March. Meanwhile, eight key media partners travelled to Northern Ireland to cover the Game of Thrones Studio Tour opening; this generated huge coverage on TV, radio, print and online.
- A press event was organised on 2 February with the Irish Cultural Centre to celebrate the anniversary of *Ulysses*, which was first published in Paris on 2 February 1922. This included the launch of the *Ulysses* programme in Ireland and was followed up with press trips. There was extensive coverage on Ulysses 100, with a nine-page article in *Le Figaro Magazine* (circulation 300,000 each week) and a TV report on France 24.
- Tourism Ireland rolled out a digital campaign to leverage the launch of *Vikings: Valhalla*. This included a 30-second behind-the-scenes video on YouTube which highlighted Wicklow locations featured in the series. The campaign delivered approximately 700,000 impressions (opportunities to see).
- Networking events and webinars took place throughout February and March with leading tour operators and trade publications including Kuoni, Tourmag, Renaissance and DITEX.
- A school groups webinar took place in early February with 41 participants. There is strong demand due to increased visa and passport requirements for GB. A school groups page has been added to the Tourism Ireland French trade site.



Market activity update



Italy:

- The first ever Irish Week in Milan took place, showcasing Irish culture through arts during St Patrick's week. This event took place throughout the city and included physical and digital events. Activities included an Irish film festival featuring the *Ireland* IMAX film, two literature readings, an immersive experience with digital content, a 3D street art and outdoor photography exhibition, as well as St Patrick festivals in the city.
- Tourism Ireland engaged three content creators, together with six influencers, to enhance the island of Ireland message during Irish Week and worked with Guinness for a St Patrick's week promotion in 15 Irish pubs in Milan; and co-operated with Bord Bia to activate 10 influencers during St Patrick's Day to boost the island of Ireland message.
- Tourism Ireland distributed point of sale material to 150+ Milan travel agencies.
- A key billboard in Milan was used as part of the Green Button Festival on St Patrick's Day. A social and digital campaign was used to amplify the message. Three influencers were also engaged; and there were radio interviews and press coverage in Milan.
- The island of Ireland featured in a two-page editorial in *Le Freccie*, a free magazine distributed to 4 million readers on all high-speed trains in Italy. In March, there was also an online article on Lonelyplanet.it featuring St Patrick and Irish Week. It also featured on Lonely Planet's Facebook page, which has 135,000 fans.
- A press event was held on 1 March to kick off Tourism Ireland's 2022 strategy and key messages, as well as to launch the first Irish Week in Milan; 100 journalists attended.
- A familiarisation visit with 15 agents from Boscolo Tours took place in early March. The itinerary included Dublin, Ireland's Ancient East and the Wild Atlantic Way.
- Tourism Ireland attended Fiera del Cicloturismo in Milan, a show about cycling holidays, which was attended by 15,000 outdoors travellers.

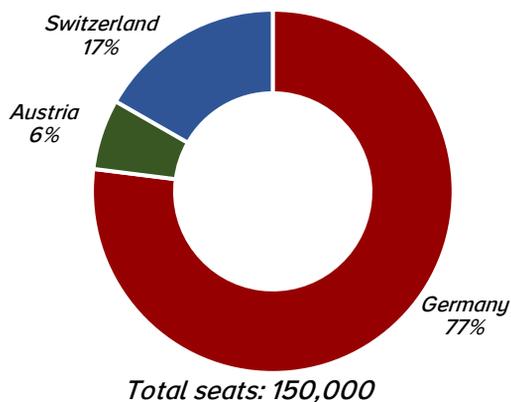
Spain:

- Our Green Button campaign will go live from April until June, on multiple channels including Connected TV, digital, outdoor and radio, with a major focus in Madrid and Barcelona. There will be a media partnership with Condé Nast Traveler Spain; and well-known influencer Gotzon Mantuliz will feature content from travel around the island of Ireland.
- Our Northern Ireland Green Button / Embrace a Giant Spirit campaign ran until the end of March across Catalonia, on digital outdoor, video, display and social channels, delivering 30 million impressions, 460,000 video views and 60,000 clicks. There was also a co-operative campaign with OTAs (online travel agents) Atrápalo and Logitravel, to drive flights and hotel bookings; and with Jet2.com, to promote direct access.
- In March, journalists from radio stations RNE and Cope travelled to Belfast to discover the home of Titanic and UNESCO City of Music.
- Influencers Mindful Travel and Judith Tiral travelled to cover St Patrick's Day.
- A TV programme called *Comerse el Mundo*, a show about global cuisine, was filmed in Dublin and will air in spring 2022 to an audience of 700,000 people.
- Tourism Ireland held several travel trade events in March, including a webinar with Agenttravel for 200 participants, a luncheon with 10 luxury members of the Travel Advisors Guild in Barcelona and a breakfast forum with key airlines and trade in Madrid.
- Tourism Ireland ran a 'behind-the-scenes' video promotion around the Netflix series *Vikings: Valhalla*, using 30- and 60-second videos on YouTube to promote Ireland locations in the series; this promotion delivered 600,000 impressions.



Access update

2022 July Germany, Austria Switzerland forecast seat capacity



News

- **Germany:** Ryanair has introduced new flights from Nürnberg to Dublin and from Frankfurt Hahn to Dublin. Lufthansa, Eurowings and Aer Lingus will continue to fly to Dublin and offer 80% of the capacity of 2019; Lufthansa will also fly to Cork.
- **Switzerland:** SWISS Airlines' Zurich to Cork service will be taken over by Edelweiss Air, running twice weekly from 15 April until 27 October.
- **Austria:** Services from Vienna to Dublin in March remain unchanged, with Aer Lingus flying four times weekly and Ryanair five times weekly. Aer Lingus will fly five times weekly and Ryanair daily from April.

Market activity update

Germany

- The Green Button campaign went live on 1 February and will continue until the middle of April. The integrated campaign is running across multiple channels and includes 'always on' digital activities and strategic bursts of TV on major networks. The campaign has delivered 50 millions impressions so far, a +37% uplift on Ireland.com, 45,000 social engagements and 9 million video views. The campaign is driving traffic to Ireland.com which features offers from industry partners.
- The Green Button Festival was live streamed on Facebook and YouTube at 8pm on St Patrick's Day in Germany .
- Co-operative campaigns are running with tour operators including DERTOUR, Lidl, Trendtours and Studiosus, as well as with travel agency chains, to generate bookings.
- Preparations are being finalised for the DERTOUR Academy, which will take place in Killarney in early April. The event will bring 200 travel agents and travel trade press from Germany and Austria to Ireland.
- The opening of the Game of Thrones Studio Tour was promoted through influencer activity and via a presence on SAT.1 (TV channel).
- The island of Ireland featured in the popular 'Kitchen Impossible' show, which aired on 6 March to a TV audience of 1.6 million viewers.
- Press trips with influencers and journalists have commenced and a digital press pub quiz with 50 media contacts took place in February to kick off the Green Button campaign.

Switzerland

- The Green Button paid media campaign commenced on 11 March.
- Tourism Ireland is currently running a co-operative digital and DOOH campaign with Edelweiss Air, to promote its Zurich to Cork route.
- A recovery trade lunch took place in Zurich on 15 March, with the main tour operators who programme the island of Ireland.
- During April and May, co-operative campaigns will commence with AG Traveltrend, Imbach, Baumeler and Travelhouse.

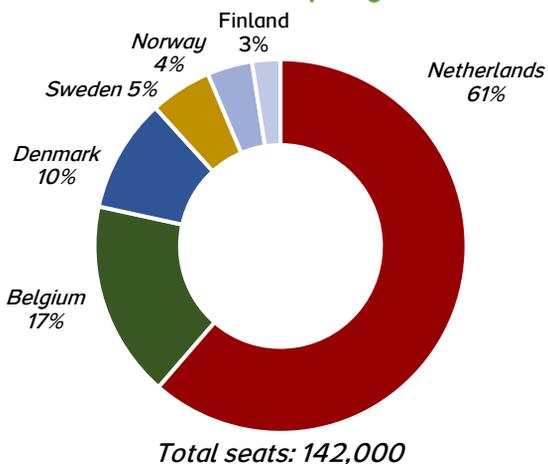
Austria

- A social media trade campaign targeting DERTOUR, Ruefa, Dodo Tours, Kneissl Touristik, Prima Reisen, Terramarin, ASI Reisen, Le Boat, GEO Reisen, Gruber Reisen, as well as the Austrian travel agency association, took place in March.
- Tourism Ireland is working with Ruefa Sports Reisen to promote the College Football Classic in August; and with Kneissl Touristik to highlight reader trips to Ireland in leading regional newspapers.



Access update

2022 July Northern Europe to IOI forecast seat capacity



News

- **Belgium and the Netherlands:** Air capacity from the Netherlands and Belgium is due to exceed July 2019 levels this summer. There will be direct flights to Cork, Dublin and Belfast (City and International airports) from Amsterdam and to Dublin from Brussels. KLM is now operating a twice daily flight from Amsterdam to Cork.
- **Nordics:** Air capacity from the Nordics is forecast to be 83% of July 2019 levels this July. Flyplay is starting a new route from Reykjavik to Dublin at the end of April.

Market activity update

Belgium and the Netherlands:

- Tourism Ireland's Green Button campaign is currently live on multiple channels including Connected TV, digital, display, social media and out of home. The campaign was launched on 12 March, with a special 'Green Button' tram running through The Hague for one month.
- Our Northern Ireland Green Button / Embrace a Giant Spirit campaign kicked off on 15 February and has been seen by at least 25 million people.
- A campaign with Cheaptickets, the largest online travel agent (OTA) in the Netherlands, ran for the entire month of March. It promoted flights and hotels from Amsterdam to Belfast on the Cheaptickets website, social platforms, blogs and through email marketing to its database.
- St Patrick's Day highlights included a St Patrick's mailing to leading DJs in the Netherlands and Belgium, highlighting the Green Button Festival and St Patrick's Day. Two journalists from the Netherlands and Belgium travelled to Cork and Dublin respectively to cover the St Patrick's Day celebrations.

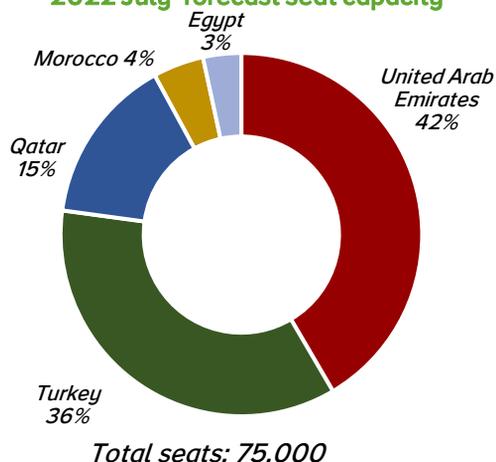
Nordics:

- The Green Button campaign was launched on 17 February in the Nordics and will run until the end of April. The campaign will run on social media, including YouTube, as well as on native channels, and will include some high impact display formats, with a focus on the 'book now' message.
- St Patrick's Day highlights included a dedicated digital campaign and a *Ulysses* themed media event for 30 key journalists.
- Tourism Ireland ran a campaign to leverage the popular *Vikings: Valhalla* Netflix show, resulting in 168,000 video views showcasing the Wicklow filming locations.
- A leading Danish journalist, Cenneth Sparby attended the St Patrick's Day Festival; and four golf influencers came on a three day golf trip to Ireland.
- The first trade event of 2022 took place in March – the Travel Match Oslo meeting, which was attended by 15 industry partners.



Access update

2022 July forecast seat capacity



News

- **Middle East:** Emirates will return to 11 flights per week from Dubai to Dublin on 1 July and to double daily on 1 August. The increase in flights will help improve connectivity to Ireland from Australia, New Zealand and Asia.
- Egypt Air will commence a new route to Dublin from 2 June, four times a week.
- **China:** Civil Aviation Administration of China approved Virgin Atlantic, Air China and China Southern Airlines to operate direct flights between China and the UK in mid-March.
- **India:** All scheduled commercial flights will resume on 27 March. With the exception of some 'air bubble packs', India had suspended scheduled flights in March 2020.

Market activity update

Middle East:

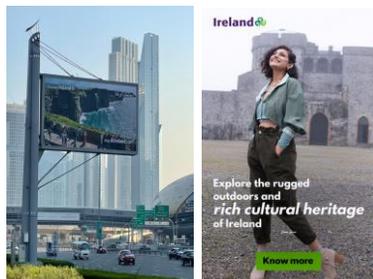
- Tourism Ireland's largest sales mission to the Middle East took place at the end of February. A record 17 tourism businesses from the island of Ireland, including five from Northern Ireland, took part in the targeted mission to Abu Dhabi and Dubai. The programme included a series of workshops and networking events, with the tourism companies from the island of Ireland meeting, and doing business with, more than 200 tour operators and travel agents.
- An extensive range of St Patrick's Day activities took place at Expo 2020, including the hosting of media and trade events in Dubai.
- During February, the Green Button campaign ran on a large outdoor billboard on the Sheikh Zayed Road in Dubai, the busiest motorway in the UAE.
- In advance of the Eid holiday booking period, Tourism Ireland ran co-operative marketing campaigns with travel trade partners Dnata and Wego.

China:

- A co-operative campaign with one of China's leading OTAs, Tuniu.com, kicked off in March and will run until June. It is promoting appealing travel experiences across the island of Ireland, targeting 90 million Chinese travellers.
- A St Patrick's Day media event, with 30 journalists and influencers, was held in Shanghai on 16 March. The event celebrated the traditions, culture and tourism of the island of Ireland.
- Tourism Ireland joined Team Ireland on 26-27 March at the first global digital trade expo in Hangzhou.

India:

- Tourism Ireland joined the Irish Embassy in Mumbai for a trade and media event to promote Ireland on St Patrick's Day.
- During April and May, three business executive (YPO) groups from Indian cities (Chennai, Mumbai and Ahmedabad) will visit the island of Ireland. Each group will have 50-80 people and will spend three to four nights.



Tourism Ireland's global campaign – St Patrick's Day 2022

Why the Green Button Festival Campaign?

The Green Button Festival was our St Patrick's Day activation for the Green Button campaign. It was the latest iteration of the wider Green Button campaign which launched in 2021. The objective of the Green Button Festival was to drive awareness and interest during St Patrick's Day, a time when there is heightened awareness and interest in the island of Ireland.

What was it?

Tourism Ireland hosted the world's first music billboard festival – turning digital billboards in New York, London, Milan and Sydney into stages for a global music festival on 17 March – with the world invited to enjoy it online at Ireland.com also.

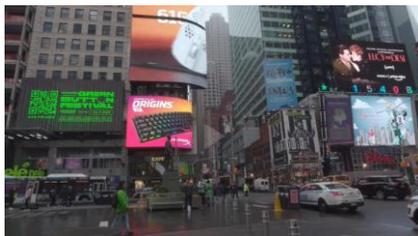
How did it work?

- At the four billboard sites, passers-by could scan a QR code to access the green button on their phone, then press it to open the curtains and enjoy a full performance. When each song ended the curtains closed, ready for someone to activate the next performance.
- The Green Button Festival was also available online at Ireland.com.



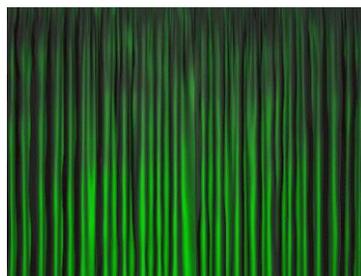
Where and when did the campaign run?

- The campaign ran on four high impact digital out-of-home billboards, as well as online at Ireland.com.
- A digital paid media campaign ran on 14-17 March in 13 overseas markets on YouTube, Facebook, Instagram and Twitter.
- The campaign was also supported by social media, trade, publicity and influencer activity.



Getting the industry involved

Tourism Ireland created industry and trade toolkits, encouraging partners to get involved by providing easily downloadable rights-free content.



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