

SOAR

(Situation & Outlook Analysis Report)

June 2022



Tougher financial conditions are expected to cause difficulty for tourism to the island of Ireland this year. The European Commission has cut its forecasts for European growth in 2022, as the war in Ukraine disrupts supply chains and drives up energy commodity costs. It now expects the eurozone to only expand by +2.7% this year, from +4.0% previously. Meanwhile, the World Bank cut its global economic growth forecast for 2022 by almost a full percentage point, to +3.2%, and warned that the crisis in Ukraine could cause a global recession as the price of food, energy and fertiliser jump. The series of COVID-19 lockdowns in China is also adding to slowdown concerns.

The air access picture for summer 2022 is positive, with data from OAG showing air seat capacity to the island of Ireland expected to be at 91% of the level seen in July 2019. However, rising inflation across Europe, coupled with a surge in demand for foreign holidays as COVID restrictions ease, has inflated prices ahead of the main tourist season. In addition, the sanctions on Russia are having a major impact on fuel prices; and aviation fuel is one of the main influencers on flight and ferry prices. Staffing issues in airports across Europe are also causing extensive travel delays and risk undermining consumer travel confidence as the industry rebounds.

Latest data from the CSO reported a total of 1,477,000 arrivals to air and sea ports in the Republic of Ireland during the month of April 2022 (this includes residents of the Republic of Ireland and Northern Ireland, as well overseas visitors).

STR reports that hotel occupancy on the island of Ireland was 78% for the month of April 2022, just -1% below the same month in 2019. The average daily rate was €145, a +26% increase on April 2019.

Our Green Button campaigns continue to target potential holidaymakers in our top 11 overseas markets, including extensive promotions in Great Britain, USA and Canada, Germany, France, Southern and Northern Europe, and the Middle East. Tourism Ireland's sales blitz in the United States has been continuing in earnest, to both the east and west coasts, showcasing the island of Ireland. We opened a new office in San Francisco in May, demonstrating the importance of the West of the USA for tourism to the island.

Tourism Ireland's latest overseas consumer sentiment research shows growing confidence and comfort in taking holidays and short breaks. Our April wave of research saw record comfort levels with taking a short break or holiday in Europe since the start of the pandemic, as holidaymakers learn to live with COVID-19 and start to release some pent-up demand. The positivity is very encouraging and shows increased optimism when it comes to travel, with 60% of outbound holidaymakers saying they *"can't wait to get away"* and 50% determined to *"get away this year, no matter what"*. However, the cost of living is the factor most likely to impede holiday taking in 2022, with a quarter of outbound holidaymakers in both Great Britain and France saying rising costs could prevent them from travelling by the end of the year.





Global seat capacity for the w/c 30 May has reached 91.2 million seats. Europe in total accounts for 26.7 million seats and airlines are predicting a steady increase, with capacity potentially reaching 2019 levels by August. Western Europe is now less than 10% behind the same week in 2019, considerably better than the global trend. There is a slight note of caution, however, as although schedules appear to be normalising, airports and airlines are still experiencing congestion and staffing issues, so we expect cancellations and delays to remain a feature for some weeks to come yet, as the industry works hard to serve current demand.



The European Travel Commission's most recent '[European Tourism Trends & Prospects](#)' quarterly report predicts that, despite ongoing risks and challenges, European tourism will continue recovering in 2022, albeit at a slower pace than previously hoped.

Forecasts by ETC expect international tourist arrivals to Europe in 2022 to be -30% below 2019 volumes, supported by domestic and short-haul travel. Domestic travel is projected to recover fully in this year, while international travel is not expected to exceed 2019 levels until 2025.



The World Travel & Tourism Council (WTTC) and travel intelligence company ForwardKeys have reported a major increase in global international flight bookings, as international travel takes off. They are predicting a positive tourism performance for the 2022 summer season, with strong booking data being reported worldwide. Q1 and Q2 figures for this year are showing triple-digit growth for inbound flight bookings around the world, compared to 2021.



Travellers are reportedly eager to spend more on travel following the loosening of restrictions, with heightened demand for premium cabin classes in 2022. Other trends include stronger last-minute bookings.

Arrivals in Europe saw a +350% surge in international arrivals for Q1 in 2022 when compared to 2021. A further acceleration of the continuing recovery is forecast for Q2, with a significant rise in international bookings, which have soared by +264% on 2021.

Iceland, Greece, Portugal, Spain and France are leading the recovery in Europe, with a strong resurgence in travel bookings – just slightly behind pre-pandemic levels.

Tourism Economics and IATA's [latest report on air traffic recovery](#) shows that longer-term industry prospects remain favourable, despite current challenges. Air transport recovery is closely linked to the global economy and they expect pent-up demand to help overcome cost/price pressures in the near-term. International recovery prospects have improved, though domestic tourism continues to lead the recovery. Vaccination, travel policies and COVID-19 outbreaks – including new variants – remain important influencing factors for the near-term aviation recovery.

IATA has welcomed new guidance from the European Aviation Safety Agency (EASA) removing its recommendation that masks should be required in-flight. This important shift reflects the high levels of vaccination, natural immunity levels and the removal of domestic restrictions in many European nations. The updated guidance also acknowledges the need to move from an emergency situation to a more sustainable mode of managing COVID-19.

Air passengers to the USA are still required to present a negative COVID-19 test taken no more than one day before departure, or proof of recovery from the virus within the previous 90 days.

The latest edition of Longwoods International's ongoing [American Travel Sentiment Study](#) indicates that record-high fuel prices and soaring airfare costs have overtaken pandemic-related concerns for consumers. According to the study, one-third of travellers said that fuel prices will greatly affect their travel plans over the next six months, while one-quarter reported that the soaring price of plane tickets will impact them in a similar way.



Economic Conditions



Great Britain

Oxford Economics has raised its near-term UK inflation forecast, due to higher assumptions for world food, oil and gas prices. Its May forecast now expects CPI inflation to average 7.6% in 2022, up from 7.2% in April. With the scope for households to offset the squeeze on real incomes by saving less looking increasingly limited, it has cut its forecast for GDP growth in 2023 by 0.2ppt to +1.4%.

Exchange rate

May '21 £1 : €1.16 May '22 £1 : €1.17

US

The US economy contracted in Q1 for the first time since the pandemic-driven recession ended, but the domestic economy showed resilience in the face of ongoing COVID concerns, lingering supply constraints and high inflation. Oxford Economics has cut its 2022 GDP growth forecast by 0.6ppts to +2.5%, while its 2023 forecast remains at +2%.

Exchange rate

May '21 \$1 : €0.82 May '22 \$1 : €0.93
 May '21 \$1 : £0.70 May '22 \$1 : £0.79

France

After a disappointing Q1, in which growth came to a standstill, Oxford Economics has cut its French GDP growth forecast to +2.8% in 2022 and +1.8% in 2023, 0.2 percentage points lower than its April forecast. The economy keeps feeling the pain from surging energy prices driven by the war in Ukraine. Inflation continues to increase, and they now expect it to average 4.5% in 2022. While they see consumer prices easing markedly in 2023 as energy prices fall, risks for the inflation outlook are likely to grow.

Exchange rate

May '21 €1 : £0.86 May '22 €1 : £0.85

Germany

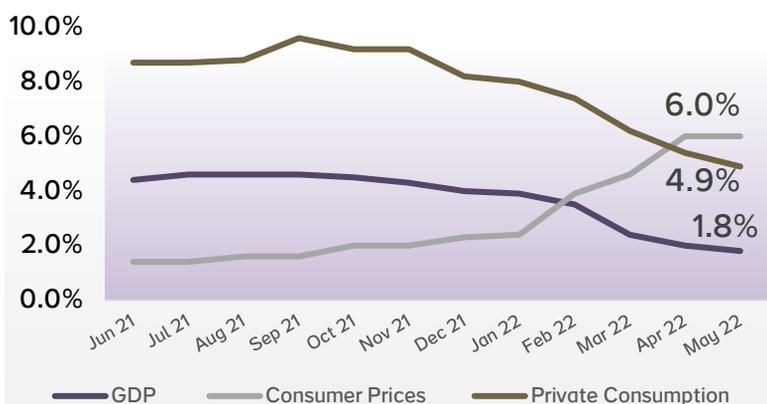
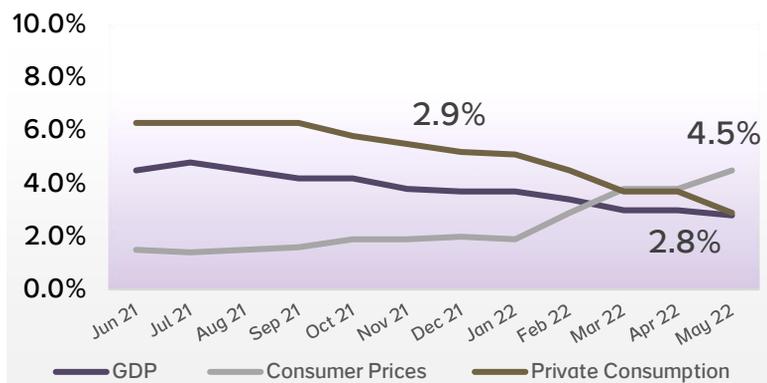
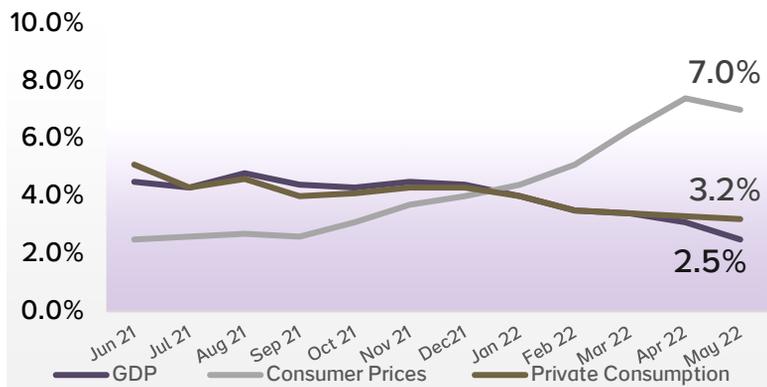
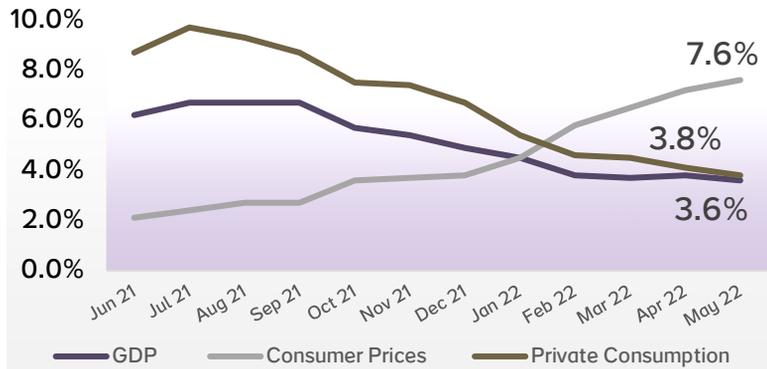
Germany's economy got off to a better-than-expected start in 2022, with GDP growing +0.2% quarter on quarter in Q1. However, Oxford Economics has downgraded its latest 2022 GDP growth forecast to +1.8% (from +2.0% in April), after factoring in additional disruptions to supply chains and industrial activity from lockdowns in China. Its 2023 GDP forecast remains at +3.1% expansion.

Exchange rate

May '21 €1 : £0.86 May '22 €1 : £0.85

2022 Economic Outlook by Oxford Economics trended each month

Source: Oxford Economics

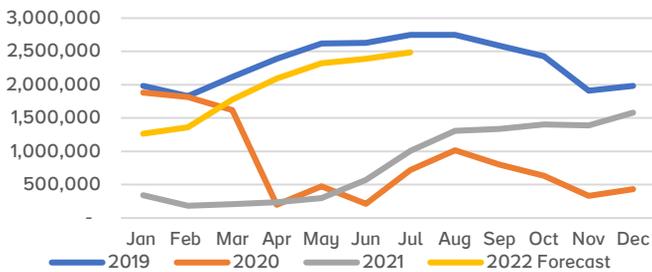


Island of Ireland Access Situation



July Seat Capacity Forecast

Island of Ireland Scheduled Seats 2019 - 2022



Seat capacity to the island of Ireland is scheduled to be at 91% of the level it was in July 2019.



A relatively strong return of direct air access capacity to the island of Ireland is scheduled for July. Based on current data from OAG, scheduled air seat capacity to Ireland is scheduled to return to 92% of July 2019 levels, with Northern Ireland scheduled at 85%.

Air Access July 2022 – % share of 2019

IOI Seat Capacity



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

Seat capacity from GB and Mainland Europe is expected to return to 92% and 91% of July 2019 levels respectively. 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 July 2022.

July Airports Outlook

Dublin and Cork airports are scheduled to return to 92% and 93% of their respective 2019 seat capacities. Belfast City Airport has seen the greatest increase in forecast seat capacity for July, moving from 43% forecast in January to 80% of July 2019 levels. This is mainly due to Emerald Airlines and the return of Flybe. Ireland West Airport Knock is the only airport scheduled to exceed summer 2019 levels.

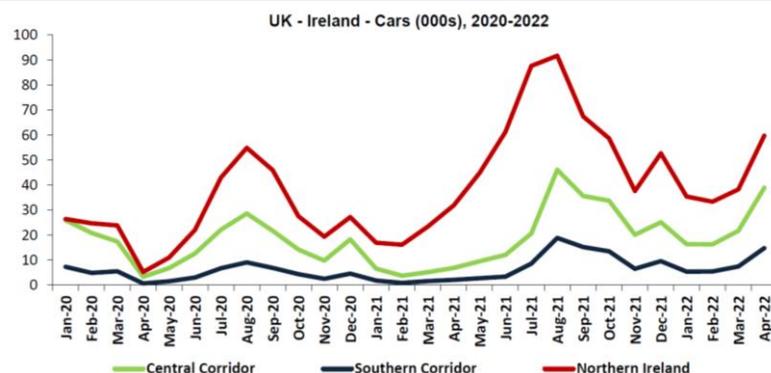
The access situation remains volatile and schedules will depend heavily on COVID-19 and other public health issues in our source markets and the implications of war in Ukraine.

| Airports | July Seats 2019 | July Seats 2022 | 2022 % share of 2019 |
|----------------|------------------|------------------|----------------------|
| Belfast Inter. | 350,385 | 301,556 | 86% |
| Belfast City | 152,484 | 122,637 | 80% |
| City of Derry | 11,627 | 11,286 | 97% |
| Dublin | 1,893,596 | 1,736,036 | 92% |
| Cork | 168,617 | 157,076 | 93% |
| Shannon | 100,052 | 90,007 | 90% |
| Knock | 49,897 | 50,908 | 102% |
| Kerry | 18,522 | 17,766 | 96% |
| Donegal | 726 | 0 | 0% |
| Total | 2,745,906 | 2,487,272 | 91% |

April Ferry Performance 2022 v 2019

Latest data shows the number of cars travelling on ferries to the island of Ireland from GB for April has passed 2019 levels. Traffic to Northern Ireland is now 136% of 2019 levels; and car traffic to Ireland (central and southern corridors) has returned to 2019 levels. There is no data available on car traffic to the island of Ireland from continental Europe at present.

| Car Ferry Traffic | April 2022 % share of 2019 |
|-------------------|----------------------------|
| Northern corridor | 136% |
| Central corridor | 98% |
| Southern corridor | 107% |
| Total | 116% |

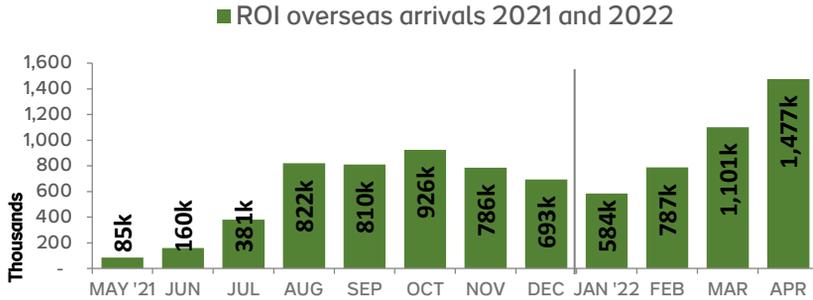


Performance to date

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 APR 2022: **1.4m -14%**
YTD JAN-APR 2022: **3.8m -29%**



ROI OVERSEAS ARRIVALS
LATEST APR 2022: **100k -14%**
YTD JAN-APR 2022: **197k -26%**

Republic of Ireland overseas arrivals January-April 2022

| Main market area | Jan-Apr 2022 (000's) | % change '22/'19 |
|-----------------------|----------------------|------------------|
| Cross-Channel | 1,461 | -36% |
| North America | 286 | -43% |
| Mainland Europe | 2,080 | -20% |
| Rest of the world | 122 | -34% |
| Total Overseas | 3,949 | -29% |

The CSO reported a total of 1,477,000 overseas arrivals into air and sea ports in the Republic of Ireland during April 2022 (this includes residents of the Republic of Ireland and Northern Ireland).

This represents a -14% decrease on April 2019.

Source: CSO

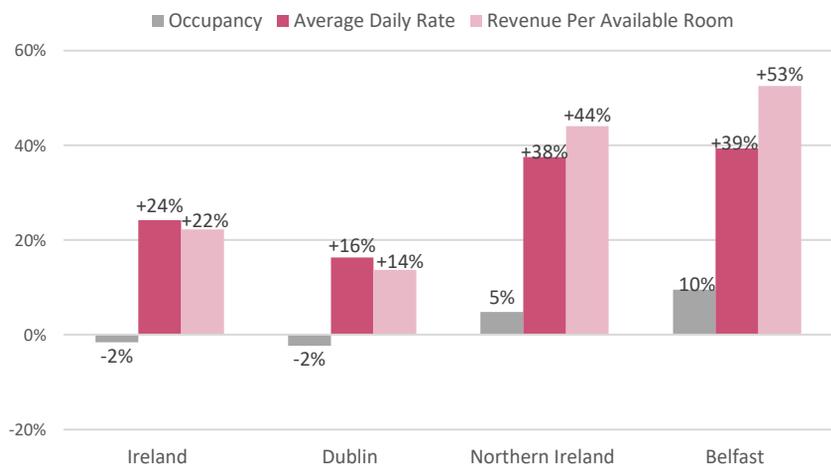
Hotel accommodation

Latest performance data from STR reports that hotel occupancy in Northern Ireland was +5% for the month of April 2022. In Ireland, occupancy for April was down -2% on April 2019.

The average daily rate (ADR) for a room in Northern Ireland in April 2022 increased by +38% to £103 and in Belfast by +39% to almost £104, when compared to the same period in 2019.

In Ireland, the average daily rate was up +24% to €148 in April 2022, when compared to same period in 2019. The average daily rate in Dublin for April 2022 was €154, up +16% on the same month in 2019.

Island of Ireland Hotel Performance April 2022/April 2019 % change



| | | | | |
|------------------|------|------|------|------|
| ADR | €145 | €154 | £103 | £104 |
| Occupancy | 78% | 84% | 75% | 80% |

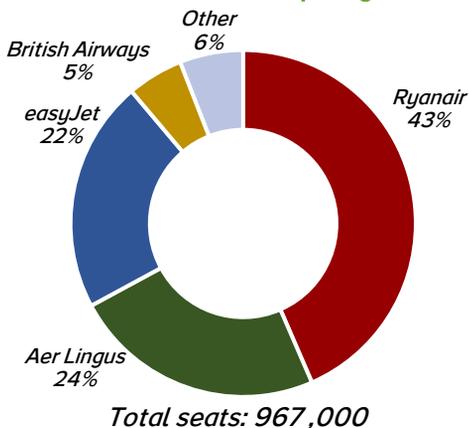
Note: Data include residents from the Republic of Ireland and Northern Ireland

ADR = Average Daily Rate

Source: STR May 2022

Access update

2022 July GB to IOI forecast seat capacity

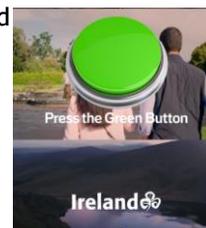


News

- Flybe officially relaunched in April, with bases at Birmingham and Belfast City airports. Additional routes to Belfast City include Glasgow, Leeds Bradford, Heathrow, Edinburgh, East Midlands, Manchester, Southampton, Aberdeen, Inverness and Newcastle.
- New Aer Lingus Regional operator Emerald Airlines has started serving Dublin from Leeds Bradford Airport and will add capacity to its existing Leeds to Belfast City service from mid-May 2022.
- Aer Lingus Regional / Emerald Airlines has also launched Cornwall Airport Newquay to Dublin flights.
- A new Loganair flight from Edinburgh to City of Derry launched on 17 May and will operate three times per week with increased summer frequency.
- Tourism Ireland and Irish Ferries' co-operative marketing campaign went live in May, promoting the Dublin and Rosslare routes from GB.

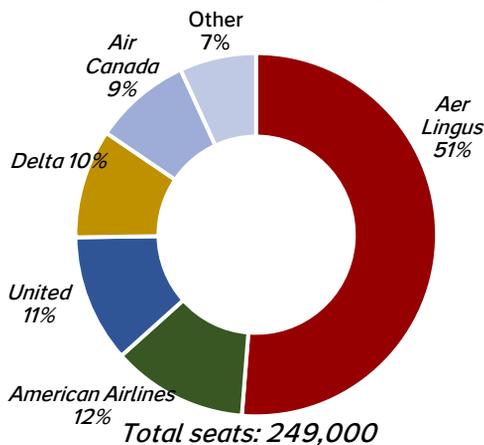
Market activity update

- The **Green Button advertising campaign** reached 47 million people in March and April and included TV, broadcast video on demand (BVOD), out of home (OOH), digital and social activity.
- The **next burst of Green Button advertising** is live from May until late June. This includes a third burst of TV, broadcast video on demand (BVOD), cinema, digital and social activity.
- Tourism Ireland sponsored the final series of **Derry Girls** on Channel 4, reaching 10 million viewers. Sponsorship included Tourism Ireland idents around each episode (live and on demand) and branding within Channel 4 social activity to promote the show on Facebook and YouTube.
- A **partnership** with deals publisher Holidaypirates, promoting hotel and package deals to the island of Ireland, was live during April and May on its site and on social channels.
- An **Aer Lingus College Football Classic** promotion was live during April and May, promoting travel to Dublin for the game taking place in August 2022.
- **Key target media** from The Times, Daily Mail and Reach PLC visited the island of Ireland on press trips.
- **Press coverage** highlights include: Dublin feature (The Sunday Times), Northern Ireland seaside resorts (The Telegraph), Derry Girls destination coverage (The Sun, The Sunday Mirror, i paper) and a four-page feature on Belfast (TTG Media).
- **Broadcast highlights** include: Ballymaloe Cookery School (and wider Cork) featured in BBC MasterChef final; live segments by Craig Doyle on ITV This Morning and ITV Loose Women showcasing Co Dublin and Co Kildare incl Malahide Castle, Deer Park Golf and Carton House.
- Tourism Ireland attended **TTG virtual Luxpo** (on 4-5 May and met with 25 leading UK luxury travel agents showcasing new island of Ireland luxury product and itineraries.
- Tourism Ireland attended the **Betfred British Masters** (5-8 May and were joined by partners including Killarney Golf and Fishing Club, Interstate Hotels and the Abbey Hotel Donegal.
- Ongoing **trade partnership and co-operative activity** includes activity with Glenton Holidays, McKinlay Kidd, Just Go Holidays, Anglers' World Holidays, Leger Holidays and Shearings.
- **Travel trade communications** in May and June include Travel Weekly and TTG.



Access update

2022 July NA to IOI forecast seat capacity



News

USA: Aer Lingus relaunched its Los Angeles/Dublin flight on 12 May, while Seattle/Dublin service will return on 7 July. Ongoing aircraft shortages at United Airlines have led to the suspension of the Washington/Dublin flight on 4-30 June inclusive. Overall, summer peak capacity from the US to the island of Ireland will run at 86% of 2019 levels.

Canada: Five gateways have been restored including Vancouver, Calgary, Montreal, Halifax and Toronto. WestJet has added a direct Toronto/Dublin service, increasing the number of seats available for the summer season.

Australia: The Qantas non-stop Perth/London flight resumed in May for the first time in over two years. Qantas also announced plans for non-stop flights from Sydney and Melbourne to London by the end of 2025, helping provide easier access to the island of Ireland.

Market activity update



USA:

- **Green Button campaign** continues with burst 2 of TV to go live in June, supported by outdoor activations in New York, Boston and Chicago. Digital remains always-on.
- **Golf campaigns** kicked off in April and include partnerships with NBC Golf Channel, Golf Digest, LINKS Magazine and sponsorships with leading golf correspondents Ann Liguori (Sports Innerview) and Matt Adams (Fairways of Life).
- **Notre Dame brand partnership:** Tourism Ireland hosted two Notre Dame Athletics brand ambassadors in May, who showcased “the Best of Ireland” to fans and alumni across Notre Dame digital and social platforms.
- Tourism Ireland hosted a **four-city sales mission** in Boston, New York, Washington DC and Chicago in late April; and a west coast sales mission in Los Angeles, San Francisco and Seattle in May (more details page 12).
- Tourism Ireland and partners took part in the prestigious **Global Travel Marketplace** in Arizona, promoting Ireland to top US travel advisors.
- A **joint campaign** with Delta Airlines launched on digital display, social, email and on in-airport screens in May; the total projected audience is over 23 million.
- We sponsored and attended the high-profile **Travel Classics media conference** for top tier editors and journalists. Chef Noel McMeel showcased our modern culinary scene. Ireland has won the bid to host the 2023 conference.

Canada:

- Tourism Ireland hosted a four-city **sales mission** in early May, joined by 15 industry from the island of Ireland and five Canadian carrier and trade partners in Toronto, Calgary, Vancouver and Victoria, with six events reaching 350+ advisors and 25 top tier media.
- **Green Button campaign** saw a second burst of a tactical Travelzoo activity in May. The promotion of Montreal-Dublin service with Air Canada will be supported by outdoor activation in June and July.
- A **joint campaign** with WestJet launches in June across digital display and social media, supported by an influencer visit promoting ease of access from the east coast of Canada on the Halifax-Dublin route. Consumer events throughout Nova Scotia will also promote the route to potential travellers, in partnership with Halifax Airport.

Australia:

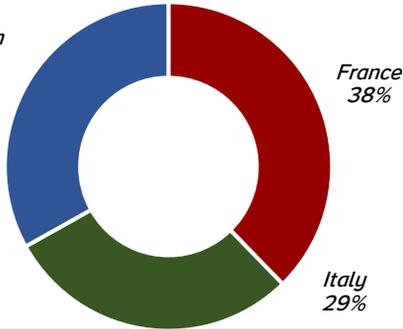
- Our **Northern Ireland Virtual Expo** took place in May with 16 industry partners, 40 trade and 92 one-to-one meetings.
- **Golfing in Ireland** will feature in the Leona Maguire cover edition of Ladies Golf Magazine and a co-op campaign with Teed Up (tour operator) will feature in the June edition of Inside Golf.

Southern Europe – France, Spain and Italy



Access update – Southern Europe

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



News

France: Air access from France is back to 90% of 2019 levels, with one ferry company confirming bookings up+35% v 2019 and a second weekly sailing to Cork confirmed for 2022. Vueling is launching a seasonal summer flight, Orly/Shannon.

Italy: Ryanair announced a new route for next winter, Genova/Dublin, with a special fare until March 2023. Italy is at more than 90% of the scheduled seat capacity for July 2022 compared to July 2019.

Spain: Ryanair announced new routes for summer – Valencia/Cork, Santiago/Dublin and Girona/Shannon. Brittany Ferries will triple capacity on its Bilbao/Rosslare route from November.

Market activity update

France

- Our **Green Button TV campaign** reached **16 million** – 80% of our target audience. Digital outdoor activity delivered 6+ million impressions (opportunities to see) to a targeted audience in the greater Paris region and west of France. The display element of the campaign delivered 51 million impressions and 13 million completed video views.
- **Six TV reports broadcast on cultural TV channel ARTE**, including dedicated Ireland programming.
- **Ireland, Home of Music campaign with leading radio station Nova** will capitalise on music as a travel motivator and "Fete de la Musique" (21 June) with an estimated 7 million impressions across digital platforms and a reach of 650,000 radio listeners.
- **Major history influencer Nota Bene** will promote Northern Ireland, Titanic Belfast and other cultural aspects of Belfast on his YouTube channel (around 2 million viewers).
- A special **Bloomsday event** is planned at the Irish Cultural Centre, in partnership with the Paris Bloomsday group; picnics will be delivered to key journalists for the occasion and there will be a generation and amplification of content.
- **Co-op campaigns with Brittany Ferries and Ryanair** will promote services to Cork and Dublin.
- **Partnerships with leading B2B2C Perfectstay and B2C Voyageprivé** are promoting packages to the island of Ireland.
- **Educational workshops and webinars** to KUONI, HAVAS, FITOURS, CE Evasion and Tourmag.

Spain

- **Green Button campaign** is running until end June across CTV (Connected TV), digital outdoor and digital platforms.
- **Co-op campaigns with Logitravel** (online travel agent) are running until end of June across cable TV, digital radio, video, programmatic display and social media.
- **Co-op campaigns with Iberia Express** will run until end of June, promoting Madrid/Dublin service across digital outdoor, display and social media.
- **Extensive Bloomsday cultural event** will celebrate the *Ulysses* centenary in Madrid, twinning Bloomsday and Dublin UNESCO City of Literature with Madrid's new cultural festival.

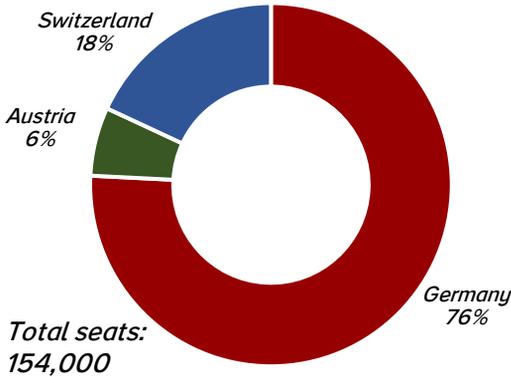
Italy

- **Green Button campaign** with two branded jumbo trams in Milan, wide cross-channel digital media campaign, audio spots on Spotify and addressable TV on Mediaset Play Infinity.
- **Co-op** digital and outdoor campaigns are live with in-market tour operators, OTAs and Ryanair.
- **Meet Ireland** virtual trade and media workshop took place on 26 May with 50 industry partners and over 100 Italian trade operators and media.
- **Editorial partnership and digital campaigns** are featuring inspirational island of Ireland content.
- **Publicity:** 13 media trips, with TV crews (AlmaTV, Rai3 Geo and Kilimangiaro) exclusive Ireland edition of *In Viaggio* about Ireland in August. Special Titanic Belfast 110 years episode on RAI1.
- **Bloomsday media event** is planned for 16 June in Milan with the Joyce Italian Foundation.



Access update

2022 July Germany, Austria Switzerland forecast seat capacity



News

Germany: From Germany, seats to the island of Ireland are scheduled at -19% behind 2019 levels. Ryanair has introduced a new flight, Nürnberg/Dublin, and has reintroduced Frankfurt Hahn/Dublin. Lufthansa, Eurowings and Aer Lingus will continue to fly to Cork.

Switzerland: Edelweiss Air Zurich/Cork regional route commenced in April (April to October twice weekly in 2022).

Austria: Vienna/Dublin in May with Aer Lingus at five times weekly; Ryanair flies daily and announced a seasonal flight, Klagenfurt/Dublin (November 2022 to March 2023, twice weekly).

Market activity update

Germany

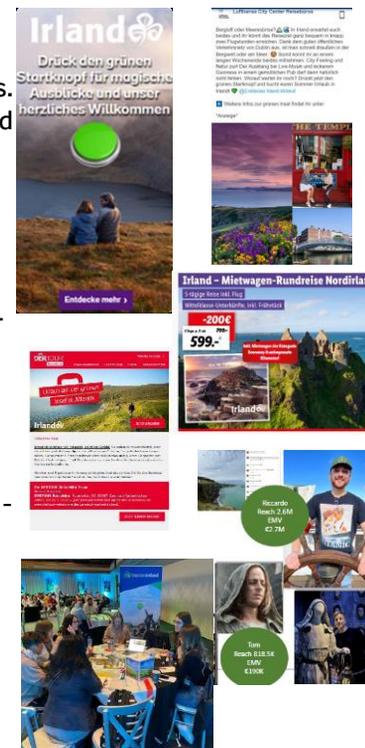
- The second burst of the **Green Button campaign**, including digital and outdoor activities, as well as radio, will run in June and July to encourage autumn travellers. During the campaign an event in Berlin is planned on 21-22 June, using a big sound and light cube, the Buddy star Trailer and on-street promoters.
- **Northern Ireland digital campaign** is running from mid-May until mid-June and includes paid social and programmatic and leverages Northern Ireland Embrace A Giant Spirit branding with Green Button messaging, to encourage consumers to book their trip to Northern Ireland.
- **Co-op campaigns** will run with Ryanair, DERTOUR, Lufthansa City Center and LIDL until the end of June, aligning with Green Button activations. Q1 co-op campaigns generated an uplift of +20% compared to 2019 with DERTOUR Reisebüro.
- **28 influencer and media trips** with 62 media are planned for Q2, as well as media nights on 31 May and 1 June in Munich and Hamburg.
- **DERTOUR Academy** brought 200 travel agents to Killarney in April with 16 educational pre-tours all over Ireland. Eighty (80) per cent of attendees were first-time visitors to Ireland.
- **Virtual sales missions** will take place in June to showcase the island of Ireland to German agents.
- **Golf Ireland stand at the BMW Open** in Munich on 23-26 June with trade and industry partners.

Switzerland

- The **Green Button digital campaign** ran until 31 May.
- Our two **"always-on" campaigns**, paid search and paid content seeding, continue.
- A **co-op campaign** with Edelweiss Air, as part of our Zurich/Cork promotion, is running on digital outdoor screens in Zurich and via social media, blog posts, newsletters and landing page banners.
- **Press trips** continue, with Dublin and coastal exploration included as a theme in April.

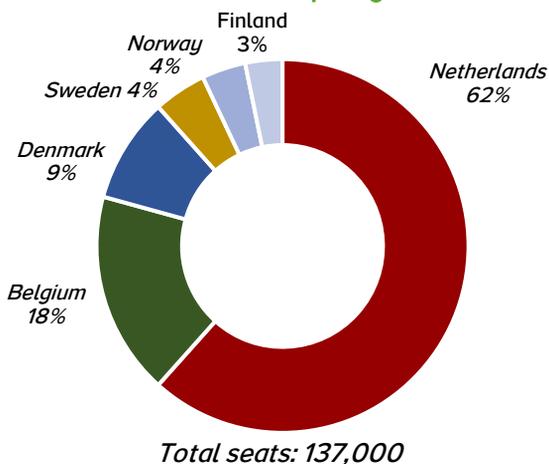
Austria

- **Social media B2C co-op campaign** with DODO Tours kicked off in May. A further campaign with Le Boat will run in June, to promote the cruising product in Ireland's Hidden Heartlands.
- **B2B events** are planned in co-operation with DERTOUR in July and August.
- **Press trips** with journalists have commenced and a press event to celebrate Ulysses100 took place at the end of May.



Access update

2022 July Northern Europe to IOI forecast seat capacity



News

Belgium and the Netherlands: Flybe will resume services after an absence of two years; a daily Amsterdam/Belfast City route will begin on 26 May.

Nordics: SAS has committed to moving from one flight a day between Stockholm and Dublin to two flights a day from July for the rest of 2022.

Market activity update

Belgium and the Netherlands:

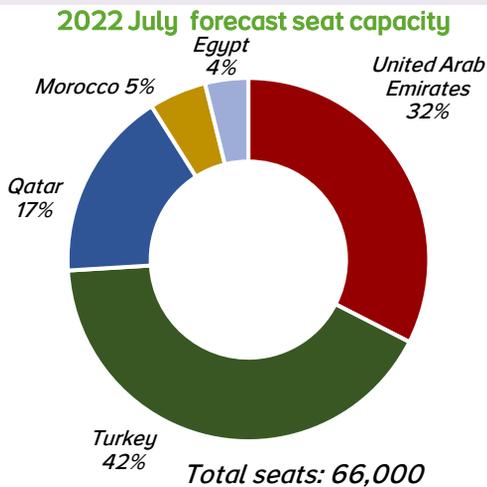
- The first **Green Button campaign** was live until the end of May, delivering 35 million impressions across the BeNe region YTD.
- The Northern Ireland EAGS Green Button campaign:** more than 47 million impressions delivered. The OTA campaign promoting Belfast and Northern Ireland delivered over 5.7 million impressions. As part of the campaign, lifestyle brand and magazine &C produced three videos and various branded articles featuring Northern Ireland and Belfast. These were promoted for three weeks on &C website, ezine and across their social platforms. Total projected views: 323,000.
- Co-op with Ryanair** promoting three routes (Amsterdam, Eindhoven, Charleroi) launched end of May.
- TV programme "Farmer seeks Wife"** featured a couple travelling to Connemara and Clifden on NPO 1 (1 and 8 May), with an average of 3.2 million viewers.
- Three **media brand partners**, including a TV partner, will visit Cork as part of our point-to-point destination campaign/twinning region in May and June.
- Travel agent event** in Belgium, in partnership with VisitBritain, took place in April and included presentations by Tourism Northern Ireland and Fáilte Ireland.

Nordics:

- Green Button campaign** ended at the end of April and resulted in 36 million impressions across the Nordic region.
- Our annual **trade workshop** took place in Copenhagen on 20 April, with 27 island of Ireland industry and 50 trade operators in attendance.
- Ryanair co-op activity** promoting three routes (Copenhagen, Billund, Gothenburg) was live in May as well as five tour operator co-op campaigns including Albatross Travel, Airtours and Stena Line travel group.
- TV programme Go North** filmed over three days in Ireland's Ancient East and is due to air on national broadcaster DK4 this summer.
- Partnership with Universal** around the promotion of 'The Northman' movie and its filming locations on the island of Ireland resulted in over 20,000 social media competition entries and featured in Sweden's largest tabloid magazine *Aftonbladet & Expressen*.



Access update



News

Middle East: Etihad celebrates its 15-year anniversary of direct flights to Ireland this summer and will increase capacity to five flights per week from July. Emirates will increase to 11 flights per week to Dublin in July and double daily in August. Qatar Airways continues to operate seven flights per week to Dublin. Egyptair will commence a new route to Dublin from 2 June, four flights per week.

China: Cathay Pacific has added Hong Kong/London flights from June, as the city eases COVID-19 restrictions, providing easier access to the island of Ireland.

India: Scheduled commercial flights resumed in March 2022.

Market activity update

Global Inbound:

- Tourism Ireland will take part in three half-day **virtual workshops** with Kuoni Tumlare. The workshops include an update and overview, as well as presentations from 11 island of Ireland industry partners.
- Final **webinar** episode with Miki Travel and island of Ireland industry will conclude our five-part webinar series showcasing all of our brands and regions to travel agents in South East Asia.
- **Co-op campaign** with AC Tours to raise awareness of Ireland's regions is ongoing, to stimulate bookings to these regions in 2022. The campaign includes e-brochure Itineraries, training webinars and highlighted web content.
- Tourism Ireland will attend the **B2B workshop, City Fair**, run by ETOA.

Middle East:

- **Green Button media campaign** launched in UAE and Qatar is running from May to July. It is live on digital, social, search, radio and outdoor.
- **Co-operative campaign** is under way with Wego, the largest Arabic consumer booking platform in the Middle East, across multiple channels in UAE and Saudi Arabia.
- 15 island of Ireland industry participated in the inaugural **Discover Europe Travel Summit** in partnership with Tourism Switzerland, Austria and Germany. It took place in Dubai on 6-9 May. 13 island of Ireland industry participated in **Arabian Travel Market (ATM)** on 9-12 May.
- Tourism Ireland joined the **Gulf Reps Royal Connections event** in Saudi Arabia in May, meeting with 30 Saudi royal bookers.
- **Influencers** Nael and Wael Abu Alteen visited and showcased the island of Ireland to their 2 million followers in April, resulting in a 268% increase in followers on Tourism Ireland's Middle East Instagram.

China & India:

- Tourism Ireland brand partnership with a leading Chinese podcast app LRTS, is targeting 500 million potential holidaymakers across China.
- In Beijing, Tourism Ireland has won a "Top 10 Short Video Destination Marketing Award" during the National Tourism Fashion Awards on 19 May.
- The Indian cricket team will visit Ireland for the T20 Games in Dublin on 26-28 June. Tourism Ireland is exploring opportunities to capitalise on this exposure across India.



Tourism Ireland Research – April 2022

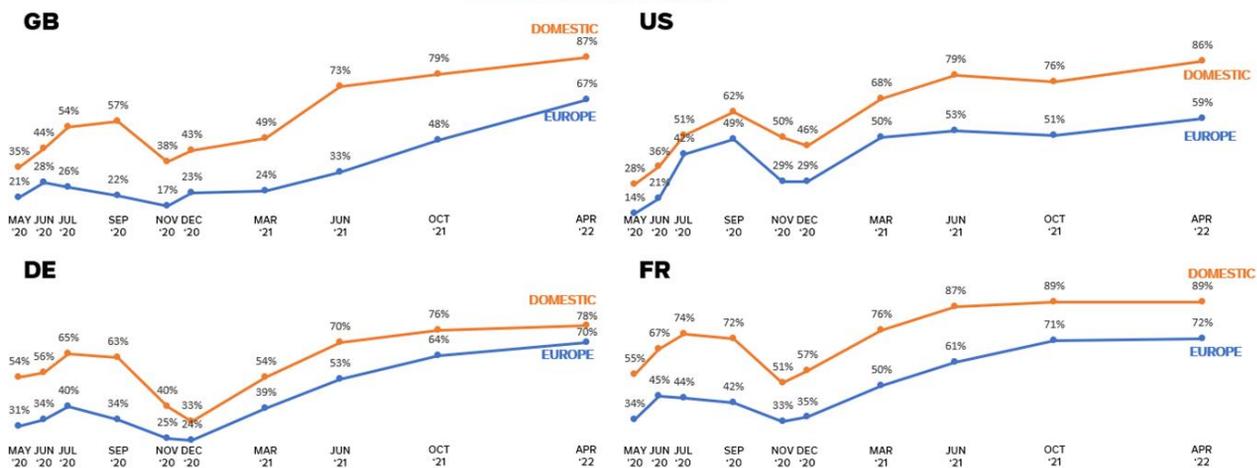
Signs are pointing to a solid recovery this year

As tourism restarts across the world after an incredibly challenging two years, we see growing confidence and comfort in taking holidays and short breaks. This recovery is happening amidst a challenging environment, with the conflict in Ukraine, continued issues related to COVID-19 and the rising cost of living each having the potential to dampen holidaymaker sentiment. However, despite the challenges, signs are pointing to a solid recovery for 2022. We continue to monitor the global situation as it evolves.

The latest wave of research found:

- Our **April wave of research** sees the **highest comfort levels yet** across all markets with taking a **short break or holiday in Europe** since the start of the pandemic, as holidaymakers learn to live with COVID-19 and start to release some pent-up demand.

Comfort over time



Q8. How comfortable would you be to take [a short break or holiday in Europe]/[a short break or holiday in your own country] in the next three months?
 Note: May '20 and June '20 fieldwork was conducted among the total population, July '20 onwards was conducted only amongst those who take overseas holidays.

- Three in five** anticipate **European travel this year**. Around one-fifth expect their next European trip to happen by June 2022, with a further one-third expecting to travel next between July and December of this year.
- Half of those expecting to travel in 2022** believe their **next trip** will be their **main holiday**. The remaining half say it won't be their main holiday or are unsure, which perhaps signals their **intention for more than one trip this year**. There is **opportunity for more breaks** in the year, particularly among French and US outbound holidaymakers, who say they'll take more short breaks in the remainder of 2022 than they did pre-Covid.
- Despite reducing in influence, **COVID-19** does remain an **influential factor for almost half outbound holidaymakers**; however, the **rising cost of living** is now of more **concern for outbound holidaymakers from France and Great Britain**. The **Ukraine conflict** is of particular concern for **Americans**, most likely due to a halo effect on Europe as a whole.
- Despite these challenges, the **desire to travel is still very clear** and holidaymakers are keen to make up for lost time. **Value for money will be an important driver** for travel as the year progresses.

Determination to get away

It's encouraging to see the positivity emerging in this wave, with increased optimism when it comes to travel. Six in ten outbound holidaymakers say they "can't wait to get away" and half are determined to "get away this year, no matter what". Holidaymakers recognise the joy to be had in travel and look forward to making up for lost time.



[CLICK HERE FOR THE FULL REPORT](#)

Tourism Ireland commissioned REDC Research to conduct online surveys among 1,000 outbound holidaymakers in Great Britain, the United States, Germany and France. Fieldwork was conducted on 4 – 20 April 2022. Participants had all taken an overseas holiday in the past three years or intend to take one in the next two years (not just sun breaks). Participants were also categorised as ABC1 (except in GB) with minimum household income thresholds applied to the United States.

Tourism Ireland leads sales blitzes to the United States

After two years of virtual events, Tourism Ireland is back doing live, in-person sales missions to the United States. Together with a delegation of tourism companies from the island of Ireland and key American tour operators, Tourism Ireland conducted two sales blitzes to the US during April and May.

The sales blitzes are part of a comprehensive programme of activity taking place across the United States this year, which is urging travellers to 'press the Green Button' and book their trip to the island of Ireland. We are letting prospective holidaymakers know that Ireland is open for business again and we cannot wait to welcome back visitors from the United States.

In April, our 'Best of Ireland' sales mission visited Boston, New York, Washington DC and Chicago. The programme included meeting, and doing business with, hundreds of key American travel agents and included a B2B event in each city, with the participating companies from Ireland promoting and selling their products and services to the key US decision-makers in attendance. The roadshows provided opportunities to tell agents that a warm welcome awaits their clients when they travel to Ireland. It also included opportunities for networking with travel and lifestyle journalists and influencers.

In May, the team visited Los Angeles (Westlake Village and Beverly Hills), San Francisco and Seattle. The programme was a valuable opportunity to highlight ease of access to Ireland – with direct flights from Los Angeles, San Francisco and Seattle – as well as what's new and exciting around the island of Ireland.

Tourism Ireland opened a new office in San Francisco – a clear sign of Tourism Ireland's commitment to playing our part in the roll-out of the Irish Government's Global Ireland strategy.

Tourism Ireland's extensive promotional programme will continue throughout 2022, to take advantage of the rebound in travel and to encourage American holidaymakers to book their trip to the island of Ireland this year.



Tourism Ireland

Bishop's Square
Redmond's Hill
Dublin 2
Ireland
D02 TD99

T: +353 1 476 3400
E: info@tourismireland.com

Tourism Ireland

Beresford House
2 Beresford Road
Coleraine
Northern Ireland
BT52 1GE

T: +44 28 7035 9200
E: corporate.coleraine@tourismireland.com

More information:

www.tourismireland.com
www.Ireland.com