



King John's Castle, Limerick

SOAR

(Situation & Outlook Analysis Report)
November 2021

- While the global travel and tourism industry continues to experience the ongoing impact of the pandemic, international borders are now open and there are high vaccination rates in most key source markets, providing a welcome return of international tourism.
- Global tourism sources are forecasting a tough winter but expect a more positive performance for tourism in summer 2022. International access is returning slowly but still remains significantly behind 2019. Based on the current outlook, expert sources vary in their expectations for a tourism rebound, with some predicting a potential rebound in 2023, while others see a return of international arrivals to 2019 levels more likely in 2024 or later.
- The global economy is relatively stable at present but economists are concerned about ongoing supply issues.
- The latest data from the World Health Organization (WHO) shows an increasing global number of new COVID-19 cases, with the European Region currently accounting for more than half (57%) of new weekly cases. Globally, almost 7 billion doses of COVID-19 vaccines have been administered to date. In Ireland, over 90% of the aged 12+ population are fully vaccinated, while in Northern Ireland, almost 78% of people aged 12+ are fully vaccinated.
- Tourism Ireland's latest consumer research shows that comfort with taking holidays continues to increase in European markets and has stabilised in the US. The desire to travel is evident, but uncertainty sees travel plans shifting later into 2022. While most holidaymakers intend to travel, the hassle factor is a barrier in committing to travel right now.
- Latest access data from OAG shows scheduled air seat capacity to the island of Ireland this November will be down by -26% compared to November 2019. Car traffic on ferries to the island of Ireland from Great Britain was down by -31% during January-September this year compared to 2019, with a -63% decline in traffic to Ireland, while Northern Ireland car traffic from Great Britain grew by +12%.
- Tourism Ireland's extensive new 'Green Button' marketing campaign is live in overseas markets, with the message that the island of Ireland is open for business and looking forward to welcoming back visitors. We have remained active in all our overseas markets throughout the pandemic, keeping the island top of mind in trade and consumers' minds. We continue to work closely with industry on the island of Ireland and overseas tourism partners in the markets, to rebuild tourism to the island of Ireland, for the long-term sustainable future of our industry.

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Global Situation



World Health Organization

The latest data from WHO reports that, during the week of 25-31 October 2021, the global number of new COVID-19 cases increased slightly compared to the previous week, with just over 3 million new cases reported.

The European Region was the only region to report an increase (6%) – its fifth consecutive week of growth. It reported more than 1.8 million new cases (+18%) and over 24,000 new deaths (+12%), compared to the previous week. The highest numbers of new cases in Europe were reported in the UK, with 285,028 new cases.

Europe and Key Markets' Situation

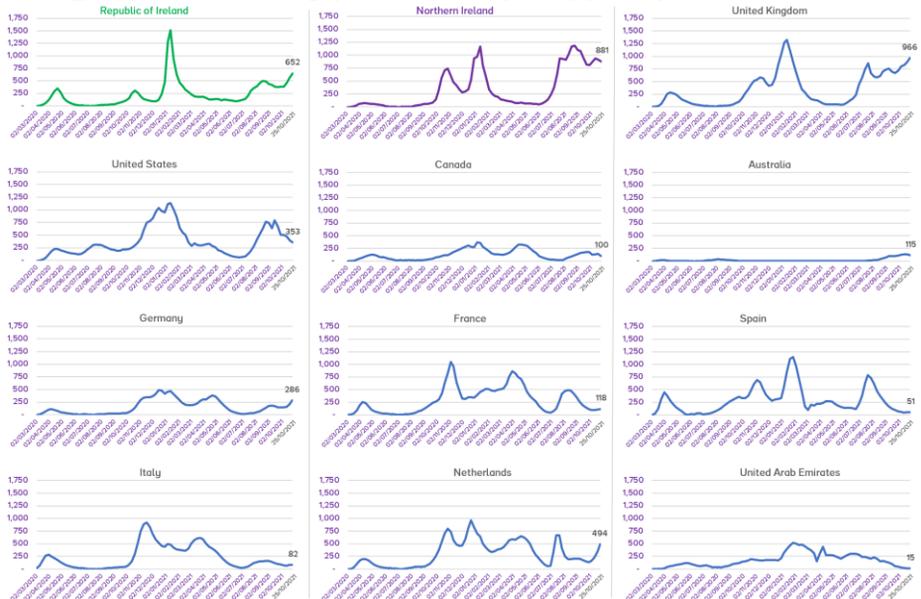


The European Centre for Disease Prevention and Control (ECDC) reports that, for the week 18-24 October 2021, the EU/EEA had a high and increasing overall case rate of 233.3 per 100,000 population (189.0 the previous week) and a low stable death rate. Case notification rates, death rates, hospital and ICU admissions are all forecast to increase over the next two weeks. Case rates are currently highest among age groups under 50 years old. An overall epidemiological situation of high or very high concern is now observed in countries all over the EU/EEA.

The latest weekly 14-day incident rate per 100k of the population in our key markets shows Australia, Canada, Spain, UAE and the US all seeing declines in case rates for w/c 25 October, when compared to the previous week. All other markets experienced increases, with the largest recorded in the Netherlands (+152 to 494), Germany (+82 to 286) and Denmark (+103 to 342). The Republic of Ireland saw an increase of +88 to 652 per 100k, while Northern Ireland saw a decline from 916 to 881 per 100k.

Source: ECDC and Northern Ireland Department of Health

Weekly, 14-day notification rate of newly reported COVID-19 cases per 100k population up to W/C 25/10/2021

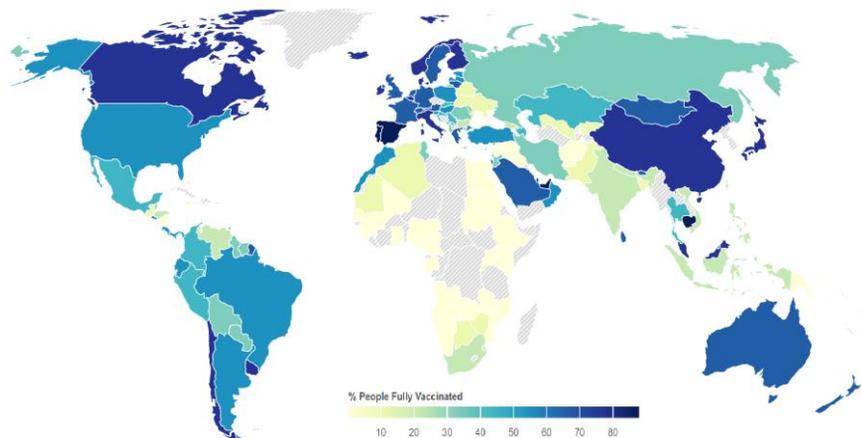


Vaccination Progress

Globally, almost 7 billion doses of COVID-19 vaccines have been administered to date.

In Ireland, over 90% of the aged 12+ population are fully vaccinated, with almost 92% receiving one dose.

In Northern Ireland, almost 78% of people aged 12+ are fully vaccinated and 83% have received one dose.



Source: John Hopkins University and Medicine 27 October 2021

COVID-19 Tracker October

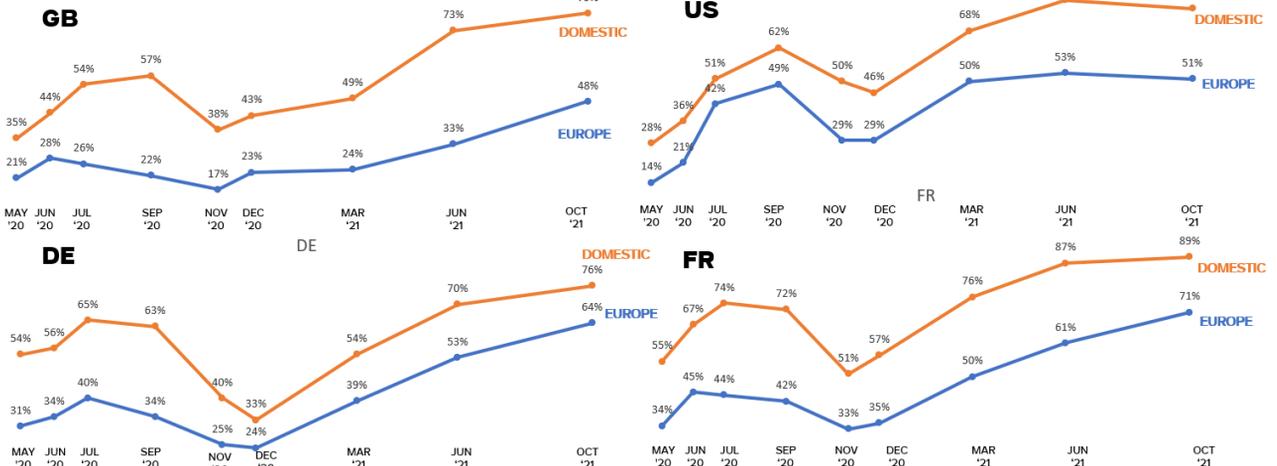


SOAR

Tourism Ireland has undertaken consumer research throughout the pandemic. Research was undertaken by REDC Research. Online surveys were conducted in October with 1,000 outbound holidaymakers in GB, the US, Germany and France. 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 also needed to be categorised as ABC1 (except in GB), with minimum household income thresholds applied to long-haul markets. Fieldwork was conducted 24 September - 8 October 2021.

Comfort continues to increase in European markets, US growth stabilised

Comfort over time

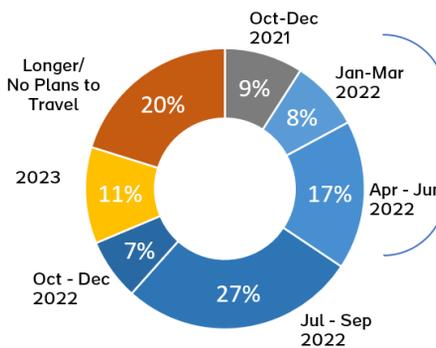


Q8. How comfortable would you be to take (a short break or holiday in Europe)/(a short break or holiday in your own country) in the next three months?
 Note: May '20 and June '20 fieldwork was conducted among the total population, July '20 onwards was conducted only amongst those who take overseas holidays.

The majority of holidaymakers expect to travel by end of 2022

Desire to travel evident, but uncertainty sees travel plans shifting later into 2022

Anticipated Next Holiday To Europe



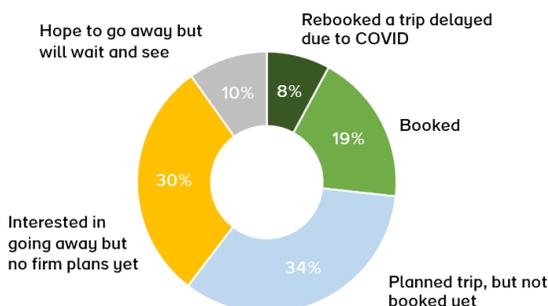
By End 2022
69% ↓
 Among Top 4
74% Jun '21
74% Mar '21
75% in Dec '21

	2021	H1 2022	H2 2022	By End 2022
TOTAL	9%	25%	34%	69% ↓
GB	9%	31%	32%	72%
DE	12%	25%	41%	78%
FR	12%	25%	31%	68%
US	3%	20%	33%	56% ↓

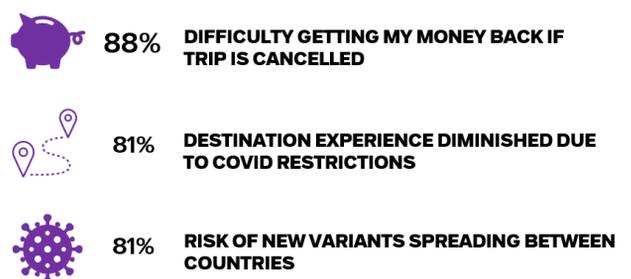
Q9. When do you anticipate you'll next take a holiday/short break of at least one night away from home? ↓ ↑ = Sig difference vs June 2021

While most intend to travel, hassle factor is a barrier in committing to travel right now

Holiday/vacation research among those anticipating travel to Europe by December 2022



Top three factors causing hesitancy to travel in near future % NET: DISCOURAGE ME A LOT/A BIT



Q13d. To what extent, if at all, would the following discourage you from travelling?

Q24. Earlier, you said you next expect to take a European short break/ holiday by December 2022. Which of these options best describes your short-break or holiday plans?



The IMF (International Monetary Fund) October report cut its forecast for world economic growth in 2021 to +5.9%, down from +6% in July. Growth in advanced economies this year has been cut to +5.2%, from +5.6%. It warns that supply chain problems are restraining growth and driving up inflation, with the rise of the Delta variant slowing the momentum of global recovery.



Latest research from the [World Travel & Tourism Council](#) shows that global tourism is recovering more slowly than expected. The lack of international coordination, stringent travel restrictions and slow vaccination rates in several countries continue to significantly impact the recovery of the global tourism sector.



According to the European Travel Commission's latest [Long-Haul Travel Barometer](#) for Q3 2021, intentions to travel to Europe between September and December 2021 remain weak in key overseas markets. Results suggest that as long as COVID-19 safety concerns persist, many travellers will remain cautious about visiting European destinations.

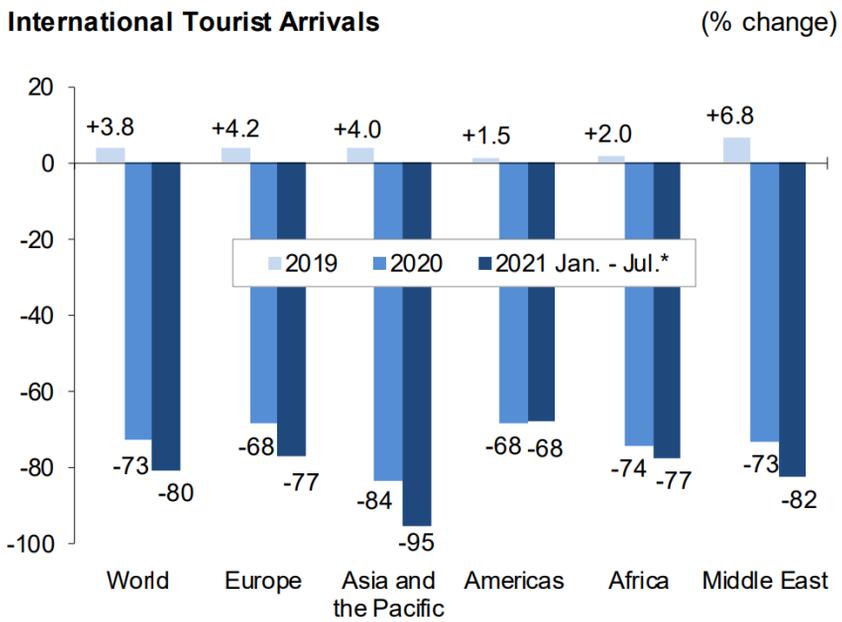


OAG reports that, as we enter the winter season, fewer changes are being made to global air schedules for the forthcoming weeks and months. Airlines are adding more capacity back on the North Atlantic, South East Asia is showing signs of a recovery, and airlines in Australia are planning the resumption of international services earlier than had been expected. In GB, both British Airways and Ryanair are adding back some capacity to the island of Ireland for the first time since the week of 23 March 2020.



Looking ahead, the latest [UNWTO 'Panel of Experts' survey](#) (September 2021) reports that the majority of industry experts continue to expect a rebound in 2022, driven by unleashed pent-up demand, mostly during the second and third quarter of 2022. Nearly one-third of these respondents expect a potential rebound in 2023. Almost half continue to see a return of international arrivals to 2019 levels in 2024 or later.

According to the UNWTO, international tourist arrivals (overnight visitors) dropped by 85% in January-May 2021 compared to the same period of 2019, as travel restrictions remained high. This follows a drop of 73% in 2020, the worst year on record for international tourism. This decline represents a loss of 460 million international arrivals compared to 2019.



Source: UNWTO

* Provisional data (% change over 2019)

Economic Conditions



Great Britain Large favourable data revisions have led Oxford Economics to nudge up their October forecast for UK GDP growth in 2021 to +7.2% from +6.9% in September. However, it has cut its 2022 GDP growth forecast to +5.7% from +6.7% in September, due to continuing escalations in supply-chain disruption, inflationary pressures building and premature monetary tightening looking increasingly likely.

Exchange rate
 Oct 20 £1: €1.10 Oct 21 £1: €1.18

US Oxford Economics has cut its GDP growth forecast for the US by 0.1ppts to +5.4% in 2021 and +4.3% in 2022. The US economy has lost some momentum, but demand appears resilient in the face of continuing supply-chain disruptions. The COVID-19 situation has improved over the past few weeks, consumer spending is firming and high frequency data suggests an acceleration in employment growth. However, limited supply and persistent inflation is weighing on activity.

Exchange rate
 Oct 20 \$1: €0.85 Oct 21 \$1: €0.86
 Oct 20 \$1: £0.77 Oct 21 \$1: £0.73

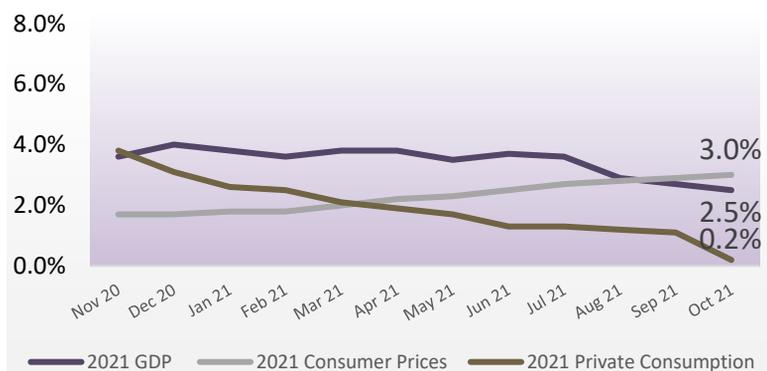
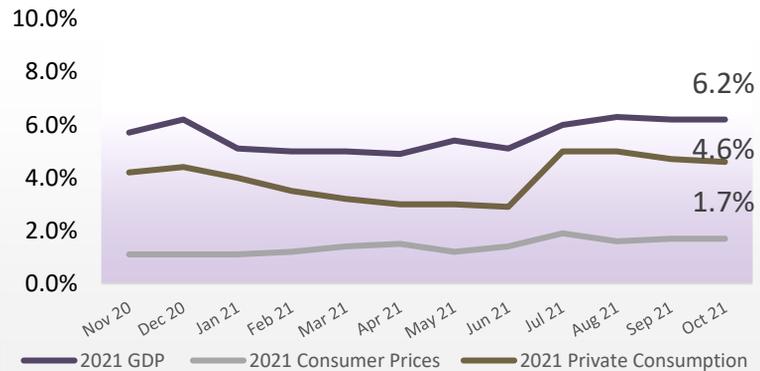
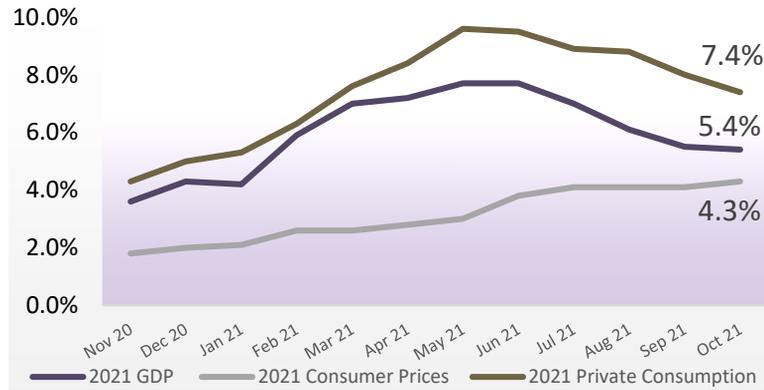
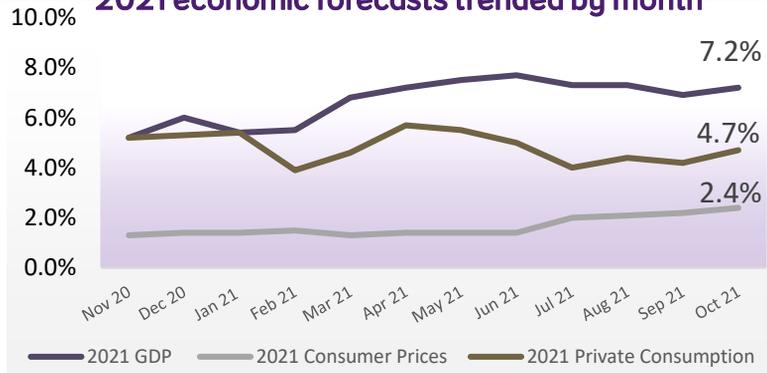
France After a strong rebound in Q3, activity in France is expected to slow sharply in Q4 as consumption patterns normalise, but momentum will remain relatively strong given pent-up demand. However, soaring energy prices have become a key risk to the outlook. Oxford Economics forecasts GDP growth of +6.2% this year and +4.2% in 2022, but risks are on the downside, and they now expect slightly higher inflation of 1.7% in 2021 and 1.9% in 2022.

Exchange rate
 Oct 20 €1: £0.91 Oct 21 €1: £0.84

Germany Supply bottlenecks took a huge toll on industrial activity in August and there is little sign that this will ease in coming months. While service spending rebounded in Q3, Oxford Economics expects the recovery to slow sharply in Q4. It has cut its 2021 GDP growth forecast further to +2.5% from +2.7%, but still see +4.5% growth in 2022, with new COVID-19 infection waves a threat. It does not expect significant forecast changes after the election outcome.

Exchange rate
 Oct 20 €1: £0.91 Oct 21 €1: £0.84

2021 economic forecasts trended by month

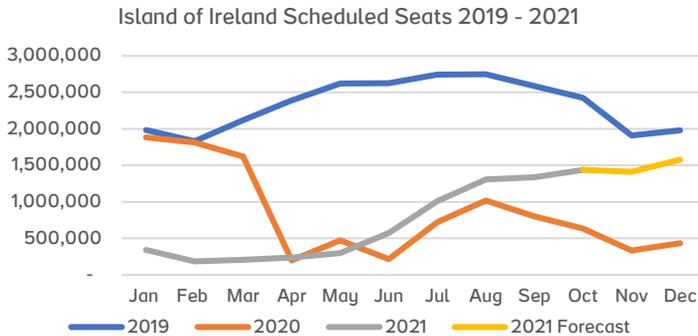


Source: Oxford Economics

Island of Ireland Access Situation



Access To date



Based on current data from OAG, scheduled air seat capacity to the island of Ireland this November will be down by -26% compared to November 2019. Compared to 2020, seat capacity will increase by over +320%. However, experience over recent months suggests some seats remain subject to last minute cancellation.

It is important to note that the access situation remains volatile and winter air access schedules will depend heavily on the COVID-19 situation in our source markets. However, airlines are indicating a further increase in capacity in 2022.

Air Access November 2021 v 2019

IOI Seat Capacity

GB 722k -25%
ME 601k -18%
NA 57k -65%
OA 32k -44%

IOI Seats 1,411,700 -26%
Flights 8,068 -32%
Airports 130 -16%
Carriers 37 -14%

Seats from Mainland Europe and GB are expected to be down -18% and -25% respectively this November, compared to November 2019. North America is scheduled to see a -65% decline on November 2019. Six fewer carriers are expected to service the island in November 2021 compared to 2019.

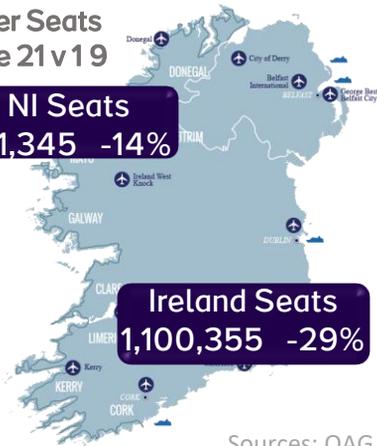
GB = Great Britain ME = Mainland Europe NA = North America OA = Other Areas

Airports November 2021 v 2019

November Seats % change 21 v 19

NI Seats 311,345 -14%

Ireland Seats 1,100,355 -29%



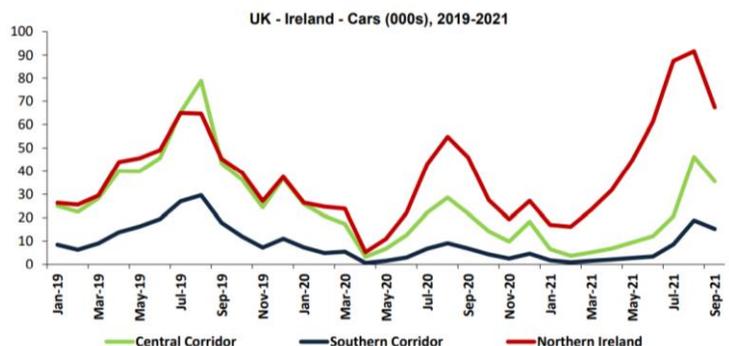
Sources: OAG

Airports	November Seats 2019	November Seats 2021	% change 2021 v 2019
Belfast Int'l	236,624	209,404	-12%
Belfast City	115,354	96,894	-16%
City of Derry	11,391	5,047	-56%
Dublin	1,333,710	1,008,957	-24%
Shannon	60,708	44,265	-27%
Knock	35,609	26,649	-25%
Kerry	12,285	10,584	-14%
Cork	104,154	9,900	-90%
Donegal	462	-	-100%
Total	1,910,297	1,411,700	-26%

Ferry Performance 2021 v 2019

Car traffic on ferries to the island of Ireland from GB was down by -31% during January-September this year compared to 2019. There was a -63% decline in traffic to Ireland over this period, but traffic to Northern Ireland grew by +12%. There is no data available on traffic from continental Europe to the island at present.

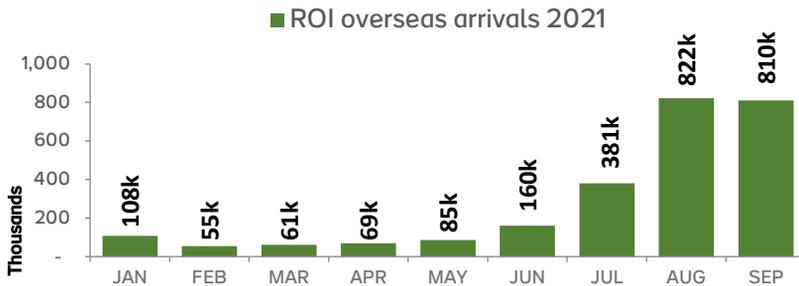
Car Ferry Traffic	% change Jan-Sep 21 v 19
Northern corridor	+12%
Central corridor	-62%
Southern corridor	-63%
Total	-31%



Republic of Ireland Overseas Arrivals

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

ROI OVERSEAS ARRIVALS 2021 VS 2019



ROI OVERSEAS ARRIVALS
LATEST SEP 2021: **743k -58%**
YTD JAN-SEP 2021: **2.3m -85%**



ROI OVERSEAS ARRIVALS
LATEST SEP 2021: **67k -37%**
YTD JAN-SEP 2021: **284k -72%**

Republic of Ireland overseas arrivals January – September 2021

Main market area	Jan-Sep 2021 (000's)	% change '21/'20	% change '21/'19
Great Britain	781	-53%	-87%
Mainland Europe	1,538	-21%	-80%
North America	140	-51%	-92%
Rest of the world	93	-38%	-82%
Total Overseas	2,552	-37%	-84%

The CSO reported a total of 810,000 overseas arrivals into air and sea ports in the Republic of Ireland during the month of September 2021 (this includes residents of the Republic of Ireland and Northern Ireland). This represents an increase of +218% when compared to September 2020 and -57% decrease on September 2019.

For the nine-month period of January-September 2021, the Republic of Ireland recorded 2,552,000 arrivals, representing a decline of -37% on 2020 and -84% on 2019.

Source: CSO

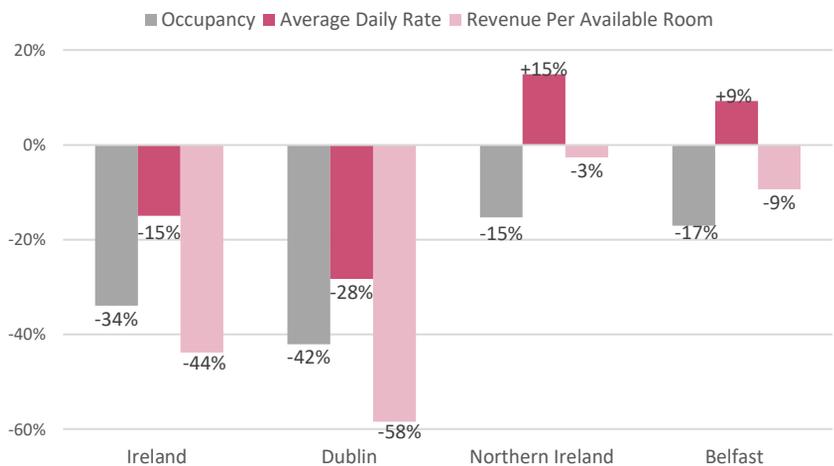
Hotel accommodation

Latest performance data from STR shows that hotel occupancy in Northern Ireland was down by -15% in September 2021 when compared with the same month in 2019. In Ireland, occupancy for September 2021 was down -34% on September 2019 levels.

The average daily rate for a room in Northern Ireland in September 2021 increased by +15% to £102 and in Belfast by +9% to £98, when compared to September 2019.

In Ireland, the average daily rate was down -15% to €125 for September 2021, when compared to 2019. The average daily rate in Dublin during September was €118, down -28% on the same month in 2019.

Island of Ireland hotel performance September 2021/2019 % change



ADR	€125	€118	£102	£98
Occupancy	59%	54%	65%	65%

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

ADR = Average Daily Rate

Source: STR October 2021

Market and trade intelligence

- The UK has joined the EU's Vaccine Passport system, which means that EU countries will recognise a UK NHS vaccine QR code, and the UK will recognise EU QR codes. Trade sources are optimistic that these positive steps will go a long way towards restoring international travel and consumer confidence.
- GB travel trade sources report positive enquiry and bookings, especially for late bookings and for 2022 and beyond, but big challenges remain, particularly for this autumn/winter, as many bookings are rescheduled arrangements or based on flexible low deposits.
- A positive uplift (relatively) for group travel to Northern Ireland and Ireland for the remainder of 2021 is reported from coach and group operators, with some tours sold out or outperforming other European tours.
- Overall GB market sentiment for golf is also positive with a high proportion of deferred island of Ireland golf bookings rebooked to return during later 2021 or 2022.
- A cautiously optimistic performance in the Fully Independent Travel (FIT) market, with bookings increasing but not yet to 2019 levels.

Market activity update

- The Green Button and Northern Ireland Embrace a Giant Spirit campaigns are both live in GB and include extensive programmes of integrated activity across digital, TV, social media, advertising, co-operative marketing, publicity, promotions and shows.
- Both campaigns focus on driving demand and bookings and will be seen by millions of people across GB.
- A 'walking' partnership with The Times went live in September and included a series of filmed walks, featuring on thetimes.co.uk, YouTube and Instagram, alongside articles, cover wraps, print and digital coverage.
- In-person events attended or hosted by Tourism Ireland GB include: the BMW PGA at Wentworth, the Moulden Marketing Destination Showcase MICE workshop and the British Travel & Tourism Show, all in September; as well as the Global Travel Week powered by Connections in October and World Travel Market and The Classic Car show in November.
- Tourism Ireland GB hosted a series of visits and events this autumn including updates on the Northern Ireland Embrace a Giant Spirit campaign and events to mark the reopening of travel to Ireland.
- Around 70 companies from the island of Ireland joined Tourism Ireland at World Travel Market (hybrid event) in London in November.

Access update

- British Airways extended its routes between Belfast and Exeter, Glasgow and Leeds this winter, from 31 October.
- Aer Lingus increased services between Belfast and Heathrow, Manchester and Edinburgh, from 31 October.
- Ryanair has announced a new flight to City of Derry Airport from Manchester, beginning 1 December; and will commence a new twice-daily service from Manchester to Cork, operating from 17 December.
- Airports such as Manchester are reporting a positive impact from the recent easing of travel restrictions but continue to lobby for further simplifications to travel protocols, to support longer-term recovery. The airport reported to TTG Media that it does not expect a return to pre-COVID passenger numbers until at least 2024.

Market and trade intelligence

- **North America:** Tour operators report significant pent-up demand with a strengthening booking pipeline and are seeing a mix of new customers and carry-over business from 2020 and 2021.
- Escorted tour operators are currently pricing and selling 2023 programmes.
- Travel agent sources report that clients are booking longer stays, upgrading itineraries and increasing overall trip spend on accommodation and are adding extra experiences and private guides/drivers.
- Golf operators report facing capacity issues as they endeavour to secure tee times at signature links courses for 2022 as a result of 2020 and 2021 rebooked business. Golf operators are already selling 2023 packages.
- Uncertainty around travel restrictions and protocols required for travel remains one of the biggest barriers to booking holidays to the island of Ireland.
- The re-opening of the US border from 8 November to travellers from Europe has boosted trade and consumer confidence.
- In **Australia/New Zealand**, some tour operators are reporting increased enquires for Europe from mid-2022.
- New South Wales, Australia's most populated state, will reopen for international travel on 1 November, when quarantine will be removed for vaccinated travellers. This is much earlier than planned and, as a result, increased demand is expected.

Market activity update

- **North America:** Tourism Ireland's Green Button campaign is under way in the US and Canada, with advertising running across TV (US only), digital and social channels, as well as third-party travel sites (Travelzoo; TripAdvisor) in North America, focusing on driving immediate intent to book and conversions for travel in 2022.
- A new brand partnership is running with University of Notre Dame Athletics, positioning the island of Ireland as "the official travel destination of Notre Dame Athletics". Media partnerships with Golf Channel and Golf Digest in Q4 will remind US golfers that *now* is the time to book a golf holiday in Ireland.
- Publicity highlights include Halloween TV activity in Canada; and a satellite media tour in late October, targeting at least 20 stations in the US, in conjunction with influencer activity in Q4.
- Key in-person trade events include attendance at leading travel consortia conferences such as Travel Edge, Signature Travel Network Conference and the USTOA Conference & Marketplace in Q4.
- Co-branded, joint-funded campaigns with leading US airline partners are running throughout Q4 to stimulate demand, generate bookings and support restoration of routes. Highlights include a co-op campaign with Aer Lingus promoting special value fares for travel through to the end of February 2022 and a co-op campaign with United Airlines to promote travel to Dublin and Shannon starting at the end of October.
- In **Australia**, publicity highlights include Halloween print activity with a double-page feature story in *The Australian* – Australia's widest circulating national premium broadsheet. A campaign to build awareness and continue to build momentum around 'Ireland – home of Halloween' ran on YouTube. An extensive B2B trade media reassurance campaign is running in Q4.

Access update

- **US:** Recent announcements on the restoration of air services include
Aer Lingus : Newark (14 November) and Orlando (11 December) to Dublin, San Francisco to Dublin (12 December)
United Airlines: Major expansion to Europe announced for 2022, including the return of its seasonal Newark/Shannon service starting 27 March 2022 and expansion of Newark/Dublin service to twice daily starting in April 2022. It plans to resume its daily non-stop seasonal service between Washington DC and Dublin on 12 February, while its service between Chicago and Dublin will resume on 27 March.
American Airlines: Seasonal Philadelphia/Shannon service will start on 8 May 2022.
- **Canada:** WestJet to launch new Toronto/Dublin service four times weekly from 5 May 2022, increasing to daily from 2 June 2022.

Market and trade intelligence

- In **Germany**, travel agencies have reported greatly improved sales in September, mostly for short-term bookings around the Mediterranean for October. In terms of overseas leisure travel from the German market during summer 2021, Turkey and Greece showed highest demand and profited most from increased sales. Meanwhile, winter holiday destinations are currently seeing weak demand.
- Trade partners in the German market are reporting a continuing trend of late booking – much later than in previous years.
- Trend wise, domestic holidays, the demand for self-catering and self-drive holidays are on the increase and there is a general trend towards smaller groups across the board.
- While the desire to travel is currently strong in Germany, reservations persist with regard to health and associated repatriation concerns. Long-haul travel is expected to take longer to recover from the COVID-19 crisis.
- Market sources report that England is somewhat struggling to convert bookings due to ‘Brexit-related concerns.’
- Major tour operators have launched their 2022 brochures which feature a selection of island of Ireland holiday options.
- A number of German leisure groups travelled to the island of Ireland this year and feedback was overwhelmingly positive. The expectation for 2022 is for a continuing steady recovery of business and an anticipated achievement of around 50%+ of 2019’s numbers overall across both FIT and group tour operators.
- Some leading tour operators are now only allowing bookings from travellers who are either fully vaccinated or have recovered from an infection with COVID-19, while other operators are only taking bookings from vaccinated, recovered and those with an official test, depending on the entry rules at the destination.
- In **Austria**, major operators are reporting that customers are prepared to pay a little extra for the flexibility of changing travel dates and to be insured against COVID-19 related cancellations.

Market activity update

- Tourism Ireland and Expedia’s pan-European co-operative campaign runs across Germany, Austria and Switzerland until December, to drive bookings to the island of Ireland.
- **Germany:** The Green Button campaign is live since September and will run until December. It features video and display ads and is live on social channels such as Instagram, Facebook and Pinterest. This activity will be complemented by a big burst on national TV and addressable TV (based on specific audience targeting) from December until January 2022.
- The Dublin City Break campaign is live in Germany until January 2022 and is running across all digital channels and on YouTube.
- An extensive email lead generation campaign is running until December.
- A dedicated Tourism Ireland podcast episode on cruising went live mid-September and was followed by a special episode on ‘Golf in Ireland for beginners’. A Halloween podcast went live in the run-up to Halloween and highlighted the history of the celebration on the island of Ireland and its stature as ‘Home of Halloween’.
- Media partnerships continue to feature strongly in Tourism Ireland’s campaigns in Germany. An outdoor activity partnership for active cycling and surfing enthusiasts will run with our media partner Pulse Publishing and will feature dedicated articles, inspirational videos and visuals.
- The Green Button influencer/blogger campaign runs in Germany with three influencers and five well-known travel blogs, with dedicated island of Ireland content under the Green Button theme.
- **Switzerland:** The first phase of the Green Button campaign ran in September and October, reminding travellers that the island of Ireland is open for business. The Dublin City Breaks campaign also ran in September and October and a special co-op with Lonely Planet ran in late October.
- **Austria:** The Green Button has been running on social media and also features digital ads promoting holidays to the island of Ireland, while a targeted outdoor campaign ran on Vienna’s public transport system during September. In addition, co-operative digital marketing to Ryanair subscribers promoted the Vienna/Dublin route.

Access update

- The Lufthansa Frankfurt/Cork service is to resume, with three flights per week, from spring 2022 onwards.

Market and trade intelligence

- In **France**, trade sentiment is positive – with DMCs, tour operators and air and sea carriers all reporting good advance interest and bookings for 2022.
- The French government has ended subsidised COVID-19 testing, with unvaccinated people required to pay for their own PCR or antigen tests. 6 million adults remain unvaccinated and it's hoped this measure will encourage vaccine uptake.
- The €30 billion 'France 2030' investment plan aims for France to be a leader in green hydrogen by 2030. It concentrates on alternative transport solutions such as the first low-carbon plane by 2030 and electric vehicles.
- Latest Orchestra/Echo travel trend research reports that EU destinations remain most popular with French holidaymakers, with long-haul travel demand increasing in September after recent lifting of restrictions to destinations such as the US and Mauritius.
- **Spain:** The outlook from Spanish OTAs (online travel agents) is positive on the recovery of city breaks this Q, with travellers taking advantage of the long bank holiday weekends. Bookings are last minute and on the rise, though coming from a lower base than 2019.
- The latest ETC report states that Spanish travel intentions are among the highest of all respondents, with half of travellers planning domestic trips and 38% planning trips to another EU country.
- **Italy's** ongoing vaccination campaign has reached 80% of the aged 12+ population and booster doses have started for high-risk categories. From 15 October, all private and public workers are required to hold a 'green pass' which denotes they are vaccinated, recovered, or hold a negative test.
- TTG trade fair feedback: high attendance and positive sentiment from operators from all over Italy, with strong interest in the island of Ireland for 2022. Main queries from market were around security and travel protocols (vaccination passport, tests).

Market activity update

- **France's** Green Button digital campaign is live since September with digital video, display, social media and rich media ads. A TV campaign will run throughout November.
- IFTM, the biggest travel trade fair in France, took place 6-8 October with a strong presence from EU destinations and French regions; however, there were few long-haul exhibitors. Tourism Ireland hosted 14 partners from the island of Ireland (five virtually), who all reported brisk business for 2022. There were reports of an increase in school group enquiries due to BREXIT.
- Co-op campaigns with Ryanair (Beauvais/Dublin and Bordeaux/Cork) and Brittany Ferries (targeting Halloween holidaymakers) ran until the end of September. Co-op with Irish Ferries is in planning.
- **Spain's** Green Button digital campaign is live until the end of 2021, reaching an estimated audience of 11 million prospective Spanish visitors. A Dublin City Breaks geo-targeted digital campaign went live in October and includes a TimeOut partnership to drive Q4 demand. Also working with key influencers.
- A co-op campaign with Iberia Express promoting the Madrid/Dublin route is running until end of October. Co-op with Logitravel runs until mid-November. A partnership with Atrápalo (OTA) runs until the end of 2021.
- An extensive publicity push for 'Ireland home of Halloween' took place, with in-person events in Madrid and Barcelona featuring partners from Púca, Bram Stoker and Derry Halloween festivals.
- **Italy's** Green Button campaign is live until mid-November on digital channels. The Dublin City Breaks campaign runs until mid-December across digital and social channels and on radio; the Wild Atlantic Way campaign is live until the end of October.
- Co-op campaigns are under way with Logitravel, Expedia and Ryanair.
- Publicity campaign continues with media visits featuring two influencers, one TV and two lifestyle magazines during October/November.

Access update

- **France:** Vueling announced new routes from Paris-Orly starting 2 November to Dublin, Cork and Belfast.
- Transavia's recovery plan was been launched (Air France-KLM), with 11 new aircraft and eight new destinations.
- DFDS launched its 'Ireland Terminal' in Dunkirk on 11 October. Passenger traffic is anticipated from H1 2022.
- **Spain:** Ryanair's Reus/Shannon flight resumes at the end of March 2022.
- **Italy:** Ryanair announced new routes Venice/Cork from March 22 and Shannon/Turin from early 2022.

Market and trade intelligence

- In **the Nordics**, overall sentiment is optimistic as all Nordic countries have re-opened their borders for travel. Trade partners in the market are reporting positive intentions and an uplift in bookings, with one pan-Nordic operator reporting strong sales for its Ireland tour in Q4 2021. There is also some positive news around golf trips, with good business coming from Sweden and Denmark to Ireland this winter. However, the majority of Nordic operators are very much focused on generating business for 2022.
- Travel advice has had some positive updates during October and this has improved sentiment – Norway and Sweden have lifted all travel restrictions from 1 October and Finland is no longer using colour coding. Denmark has no red countries and limited yellow and orange; and these are only aimed at unvaccinated people.
- The Danes are the most keen to travel internationally, with more than half planning international leisure travel in the next 12 months, followed by Norway (45%), Finland (36%) and Sweden (34%). Value for money and climate were the top two influencing factors for Nordic holidaymakers when choosing a holiday destination.
- The Swedish government is proposing a climate declaration for travel, which would mean that all airline and tours will be required to provide comparisons with other forms of travel and also include information on the climate impact of their journey. If the law is adopted, it will apply from 1 July 2022.
- In **the Netherlands**, opportunities for new business are emerging for the island of Ireland, as Dutch tour operators continue to broaden their portfolio of short-haul destinations within Europe for 2022.
- Market trade are reporting strong interest and good opportunities for Ireland to attract more school groups and school trip business as a result of Brexit passport requirements and current COVID-19 testing policy on Day 2 after arrival in the UK.
- Domestic breaks remain popular in the Netherlands, with around 50% of Dutch travellers taking a domestic break in the later half of 2021.
- **Belgium:** Belgians are starting to regain travel confidence and tour operators are seeing consumers booking ahead for 2022 travel – mainly within Europe.

Market activity update

- The digital Green Button campaign is live since September and will reach millions of consumers across multiple channels in Northern Europe in the coming months.
- A dedicated Dublin City Break campaign kicked off in the Netherlands and Belgium in September and in the Nordic markets in October. A consumer campaign promoting direct air access to Cork (KLM and Aer Lingus), as the gateway to the Wild Atlantic Way, is due to launch mid-November, on Facebook and Instagram; it will also feature display ads in the Netherlands. These campaigns will also be amplified by Tourism Ireland's organic social media and email activities.
- A number of key influencers have travelled to Ireland documenting their experiences in real time on social media. Key offline media publications are also travelling to the island of Ireland over the coming months.
- A co-operative campaign with Expedia is running until year end across Northern Europe, generating bookings until end March 2022.
- An Odigeo co-op campaign is also running from mid-October, promoting winter breaks in Dublin in Q4 2021 and Q1 2022.
- Several co-operative campaigns with key tour operators are also running offline and online across Northern Europe, promoting autumn break packages and 2022 tours and packages.

Access update

- Ryanair routes to Dublin from Copenhagen and Gothenburg are back to pre-pandemic capacity, with the other airlines running at approximately 50% capacity compared to 2019. Terminal 2 in Stockholm Airport, which had been closed during the pandemic, has been re-opened due to the increase in flights.
- Aer Lingus is to resume daily flights from Amsterdam to Cork from end of November 2021.
- KLM has announced an expansion of its Amsterdam service to Cork, with a twice-daily service from 23 November 2021.

Market and trade intelligence

- **GCC:** Trade feedback in the Middle East is very positive and optimistic for the island of Ireland, particularly for 2022 for the EID break in May and for the summer period.
- The UK is open for travel from the UAE and market trade partners report strong interest.
- Saudi Arabia and Qatar are encouraging their nationals to not travel outbound yet.
- TFest, the global B2B luxury travel networking event, was hosted at the Atlantis Hotel in Dubai on 10-14 October. Tourism Ireland and seven luxury island of Ireland industry partners attended, showcasing all that Ireland has to offer as a luxury destination.
- Tourism Ireland hosted an island of island industry and travel trade dinner following TFest and conducted an in-person sales call blitz to key travel trade, during the week 17-21 October.
- Citizens who received the non-European Medicines Agency (EMA) approved Sinopharm vaccine are currently getting a top-up Pfizer vaccine and will now be eligible to travel to Europe.
- In **India**, market trade are reporting a significant increase in enquires for business and leisure travel to Ireland, including some promising enquiries from the movie industry.
- The Embassy of Ireland has recommenced issuing short-stay visa applications across all visa offices in India.
- **China:** There was a strong uplift in travel for China's national holiday, with 515 million domestic trips made, which equates to roughly 70% of the pre-pandemic level.
- According to Trip.com and Toncheng's joint report, bookings for short-haul trips and demand for high-end luxury hotels have grown.

Market activity update

- **GCC:** The Green Button consumer, trade and media campaign launched on 4 October. The campaign will reach over 30% of the population across the UAE and Qatar and aims to drive bookings for Q4 2021 and for 2022.
- Four key influencers travelled to the island of Ireland from the Middle East, to launch the Green Button campaign in the market.
- Expo 2020 Dubai opened in October and Tourism Ireland has an interactive Green Button installation at the Ireland pavilion for the six-month duration of Expo. Visitors are encouraged to press the Green Button and enjoy a series of videos of Ireland.
- **India:** A series of celebrity endorsements and publicity features will take place in the Indian market during autumn/winter 2021, keeping the island of Ireland top of mind and building intention to travel to the island of Ireland in 2022.
- **China:** Tourism Ireland joined Ireland's national pavilion at the 'China International Fair for Trade in Services' in September, showcasing Ireland's key attractions as a holiday destination to over 100,000 Chinese consumers in Beijing.
- **Global Inbound:** The 'Flavours of Ireland' workshop took place in London in October, with 60 island of Ireland industry partners meeting more than 100 top global inbound tour operators. The Global European Marketplace took place on 29 October with 26 industry partners from the island of Ireland meeting with global tour operators and travel buyers. The British and Ireland Marketplace will take place on 28 January 2022, showcasing the best Irish and British tourism products to influential global buyers; this in-person event will be followed-up with an online day, on 1 February. A marketing partnership will take place with Hotelbeds from October to early 2022 in support of the Green Button campaign. Tourism Ireland's webinar series with Miki Travel is highlighting the island of Ireland and its regions to more than 250 travel agents in South East Asia.

Access update

- Emirates, Etihad and Qatar Airways have maintained strong access to Ireland from the Middle East throughout 2020 and into 2021. In October, Emirates increased access to seven flights per week.
- British Airways increased capacity from 16 August and is now operating 20 direct return flights across Delhi, Mumbai, Bengaluru and Hyderabad to London. BA is expected to further increase flights in November.
- China's 'Five One' policy remains in place; this policy essentially limits Chinese airlines to just one international flight a week, while passenger capacity is capped at 75%. Foreign carriers can also operate only one flight a week to China. Major carriers operate weekly flights to Europe, with transit to Ireland.

The Green Button Campaign

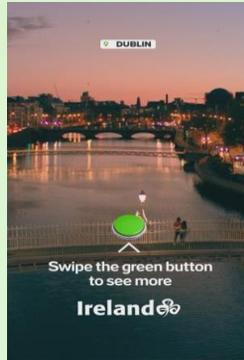
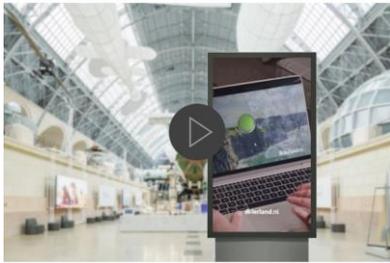
Tourism Ireland's New Marketing Campaign

Why the Green Button Campaign?

With the world emerging from the COVID-19 crisis and consumers becoming eager to travel again, Tourism Ireland needed a campaign with impact, to stand out in a cluttered competitive environment. We needed to develop a tactical campaign that would drive consideration and bookings to Ireland NOW.

Why it works

- The campaign revolves around creating a commitment to travel by pressing the green button; the Green Button is a metaphor for booking a trip to the island of Ireland, as green is synonymous with the island of Ireland and the universal colour for go!
- The campaign dials up all of the island of Ireland's strengths and iconic locations with a very clear call-to-action: Press the Green Button.
- We continue to target the 'Culturally Curious' audience but have reduced the target age to 20+ to try to capture a younger audience, who we know from our research are more likely to travel in the post-Covid world.



Ireland 

Press the Green Button 

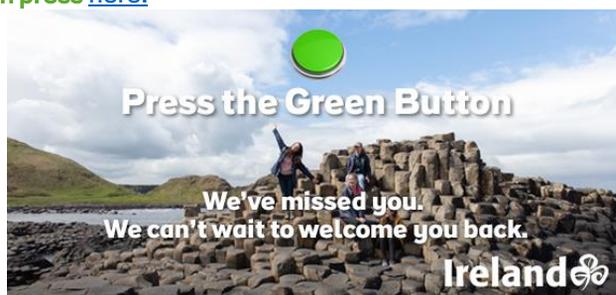
Where and when is the campaign running

- The campaign is Tourism Ireland's most ambitious integrated campaign and includes advertising on linear and digital TV, social media and out-of-home; email marketing; publicity and influencer activity; and co-op campaigns – all supported on Ireland.com.
- The campaign will reach an audience of in excess of 150 million people in 13 overseas markets.
- The Green Button campaign went live in September 2021, with a media spend of €15 million. The current burst will run until the end of the year. The focus is to drive bookings for travel in Q4 in relevant markets and for 2022.

Getting the industry involved

- Tourism Ireland created industry and trade toolkits encouraging partners to get involved by providing easily downloadable content that is rights-free and can be used to promote their business. [Link to Industry toolkits](#)

For more on the Green Button campaign press [here](#).



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