

SOAR

(Situation & Outlook Analysis Report) October 2022



Global growth is projected to remain subdued in the second half of 2022, before slowing further in 2023 to an annual growth of 2.2%, according to latest forecasts from the [OECD](#). Higher-than-expected inflation and rising interest rates worldwide are likely to translate into higher travel costs and weigh on consumer spending. The UNWTO has noted that the appreciation of the US dollar and its parity with the euro, reached for the first time in two decades, could favour the competitiveness of destinations in the euro area with regard to the US market in this latter half of 2022. Sterling, while volatile at present, is also trading low against the US dollar, meaning US holidaymakers will have access to good value holidays in Northern Ireland. Stronger-than-expected travel demand continues to create operational and workforce challenges, while the war in Ukraine, high inflation and rising interest rates, as well as signs of an economic slowdown continue to pose a risk to continuing recovery.

Based on latest OAG filings, scheduled air seat capacity to Ireland is at 96% of October 2019 levels, with Northern Ireland scheduled at 100%. While the outlook is quite positive, levels remain subject to change.

Tourism Economics reports that the rebound in global air travel demand faltered mid-year, as economic headwinds hindered growth. Higher costs and squeezed incomes are having some initial but modest impact, while labour shortages remain a concern.

Latest data from the CSO reports a total of 2,038,000 arrivals to air and sea ports in the Republic of Ireland during the month of August 2022 (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 85% for the month of August 2022, -4% below the same month in 2019. The average daily rate was €169, a +26% increase on August 2019.

Tourism Ireland's Green Button campaigns continue to target holidaymakers in our overseas markets, with promotional activity in Great Britain, USA and Canada, Germany, France, Southern and Northern Europe and the Middle East. In addition, our dedicated Halloween campaigns kick off in October, promoting the island of Ireland as the 'Home of Halloween' across all markets. Tourism Ireland continues to stay in close contact with trade partners in our key markets, building on strong relationships to generate business for 2023 and beyond.

Expedia's latest [Traveler Insights Report](#) shows that consumers worldwide still want to travel and are making plans for future trips, in spite of economic uncertainty. Enthusiasm for travel remains high and indications are positive for travel intent for the remainder of 2022. The trend for shorter booking windows persists, and the demand for long-haul travel remains steady. Global average ticket prices continue to rise however, driven by strong demand and fluctuating fuel costs. The demand for sustainable and inclusive travel also continues.



The International Civil Aviation Organisation's [latest analyses](#) reveal that global air transport seat capacity and passenger totals have reached an estimated 80% of pre-pandemic levels, with passenger revenue at around 72% of its 2019 high point. The number of air passengers carried from January to August of this year increased by an estimated +55%, compared to the same period in 2021. Aircraft flight departures increased by +28%, with overall seat capacity growing by +32% over the same period.



The short-term outlook for accommodation performance across STR's [48 forecast markets](#) continues to improve, with 2022 occupancy and average daily rate (ADR) upgraded for most European markets. Pent-up leisure demand continues and rescheduled COVID-era events are helping corporate demand. Strong demand, alongside persistently high inflation and tight labour markets, are expected to contribute to continued ADR growth. While the pace of recovery for most European markets is expected to slow from Q4 2022 through Q1 2023, demand remains on track for recovery by 2023 for the 32 European forecast markets. The inflationary environment will lead to higher rates, with ADR growth expected to maintain double-digit growth levels this year and in 2023, when compared with 2019 rates.



Latest data from ForwardKeys shows that continued post-pandemic travel recovery remains likely, despite rising inflation and threats of recession. Forward bookings for leisure travel show a continued recovery post-pandemic and business bookings are catching up. Caution persists though, due to the continued war in Ukraine and its consequent impact on energy prices, as this will negatively affect European economies and likely dent consumer confidence and corporate demand. However, it is important to note that there is currently a concentration of flight bookings during the traditional autumn half-term peaks and Christmas. There is concern that these peaks could lead to further flight disruption, if the recent recruitment difficulties experienced by the aviation industry persist.



Overall global consumer confidence continues to decline as inflation rises and the worldwide cost of living crisis kicks in. Global tourism sources report that medium to long term travel outlook continues to remain unclear as the impact of rising household food and energy prices takes hold. The Ipsos' [Global Consumer Confidence Index](#) for September reads at 45.7, down 0.4 point since August. The Index sits at its lowest point since April 2021. In addition, the Expectations index has declined for the 11th consecutive month and it now sits at its lowest point since December 2020.



Consumer confidence in the EU hit its lowest level on record in September. The [Flash Consumer Confidence Indicator for EU and euro area](#) recorded a continuing steep downward trend in September, dropping by 3.5 points in the EU (-29.9) and 3.8 points in the euro area (-28.8).



A new Ipsos poll in GB shows high levels of public concern about the rising cost of living, with 90% of Britons concerned about rising costs on themselves or the country as a whole. [The GfK Consumer Confidence indicator](#) in the UK fell to -44 in August 2022 from -41 in July, hitting a new record low. On 22 September, the Bank of England said Britain was now in recession and raised interest rates by 0.5 percentage points to a 14-year high of 2.25%.



US [consumer confidence](#) increased in August, after falling for three months; however, concerns about inflation remain elevated. Purchasing intentions increased after a decline in July, and vacation intentions reached an eight-month high on the back of a strong dollar.



Note: At the time of writing, the UK government is working through a number of fiscal proposals which are impacting on exchange rates; this is being closely monitored by Tourism Ireland.

Economic Conditions



2022 Economic Outlook by Oxford Economics trended each month

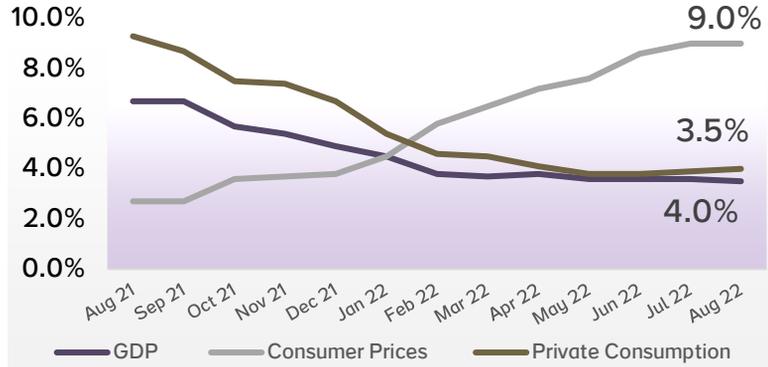
Source: Oxford Economics

Great Britain

Due to the month-to-month volatility, Oxford Economics' latest published forecast believes that the UK economy has little momentum and it cut its forecast for 2023 GDP growth by 0.1ppts to 0.2%. It expects another fall in GDP in Q3. The volatile movement in the value of sterling and government fiscal interventions since this forecast was published are expected to further impact economic growth and add to the instability.

Exchange rate

Sept '21 £1 : €1.17 Sept '22 £1 : €1.11

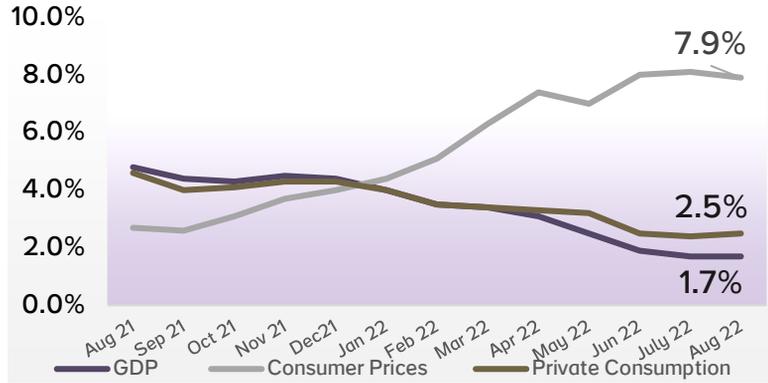


US

Oxford Economics' forecast for 2022 real GDP growth remains unchanged at 1.7%, as economic momentum should remain resilient in H2 2022. The US economy is expected to experience a mild recession in H1 2023, as high inflation, rising interest rates, lingering supply chain difficulties, softer labour market dynamics and global headwinds weaken demand. It has cut their 2023 forecast by 1ppt to a flat outcome.

Exchange rate

Sept '21 \$1 : €0.85 Sept '22 \$1 : €1.04
Sept '21 \$1 : £0.73 Sept '22 \$1 : £0.92

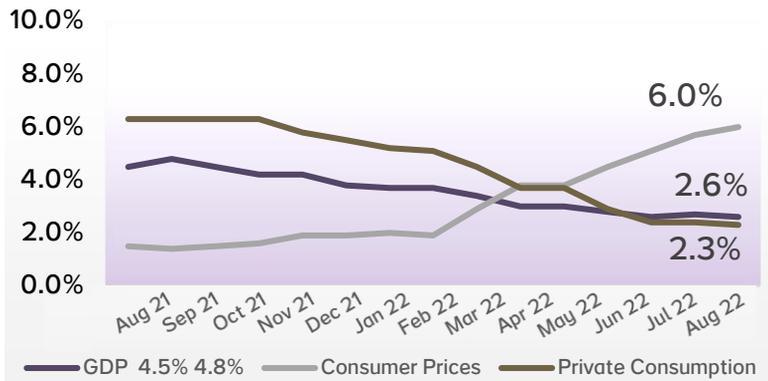


France

Oxford Economics now expects higher inflation and a recession in France this winter. GDP is forecast to shrink in Q4 2022 and Q1 2023 and expected to barely grow in Q2 2023. It expects the economy to advance just 0.2% in 2023, down from 0.9% in August. Inflation is forecast to average 6.0% in 2022 and 4.4% in 2023, up from 5.7% and 2.0% respectively.

Exchange rate

Sept '21 €1 : £0.86 Sept '22 €1 : £0.90

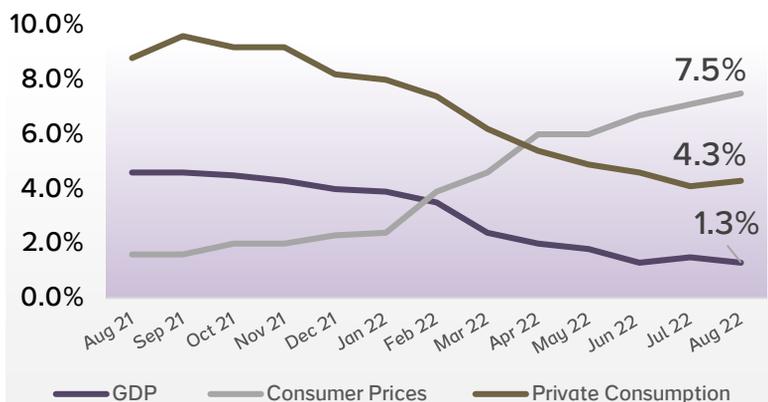


Germany

Oxford Economics now sees German inflation peaking higher than forecast and slowing more gradually, given the elevated gas price forecast. Real incomes will contract in 2023, deepening the dip in consumer spending. It forecasts the economy entering recession in Q3. The 2022 GDP forecast has been cut 0.2ppts to 1.3% and the 2023 forecasts cut another 1.0ppt to -0.8%, with inflation now seen above 4% next year.

Exchange rate

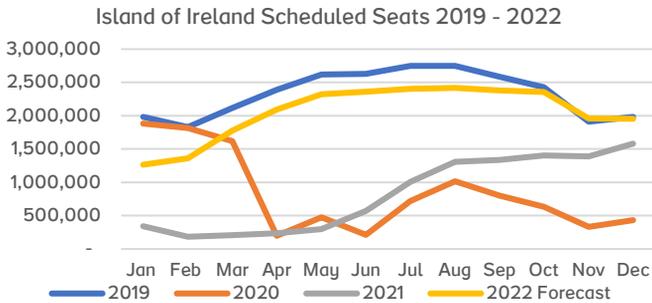
Sept '21 €1 : £0.86 Sept '22 €1 : £0.90



Island of Ireland Access Situation



October Seat Capacity



A strong restoration of direct air access capacity to the island of Ireland is scheduled for October. Based on latest OAG filings, scheduled air seat capacity to Ireland is scheduled at 96% of October 2019 levels, with Northern Ireland scheduled at 100%.

Seat capacity to the island of Ireland is scheduled at 97% of the level it was in October 2019.

Air Access October 2022 – % share of 2019

IOI Seat Capacity



IOI seats **2,357,381** **97%**

Flights 14,141 95%
Airports 181 104%
Airlines 48 100%

Market connectivity is scheduled to be close to 2019 levels. Seat capacity from GB and Mainland Europe is filed at 96% and 97% of October 2019 levels respectively. The same number of airlines (48) are scheduled to operate in October 2022 as October 2019.

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

Airports Outlook – October

Dublin and Cork airports are currently filed to return to 96% and 99% of their respective 2019 seat capacities. Belfast City Airport and Belfast International Airport are filed at 119% and 93% respectively.

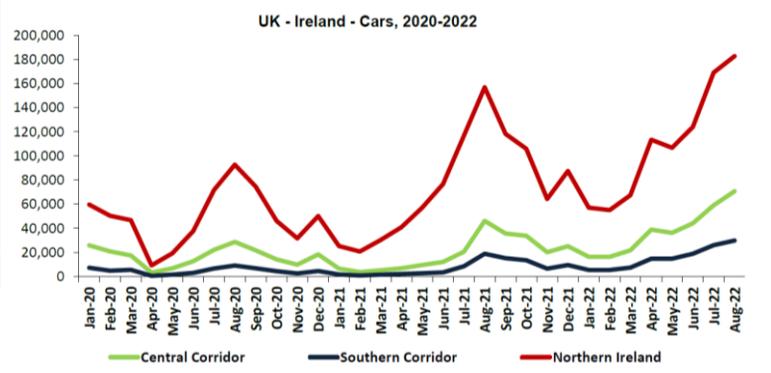
While the capacity outlook is very positive for October, the airline industry continues to experience several operational issues including strike action, staff recruitment and flight cancellations, which may roll over and impact future schedules.

Airports	Oct 2019 Seats	Oct 2022 Seats	2022 % share of 2019
Belfast Int.	311,043	290,208	93%
Belfast City	133,987	159,811	119%
City of Derry	12,000	9,262	77%
Dublin	1,701,861	1,625,329	96%
Cork	128,627	127,551	99%
Shannon	81,246	78,418	97%
Knock	44,678	49,792	111%
Kerry	15,876	17,010	107%
Donegal	660	0	0%
Total	2,429,978	2,357,381	97%

Ferry Performance – August 2022 v 2019

Latest available data for August 2022 shows more cars travelling on ferries to the island of Ireland from GB than in 2019. Car traffic to Northern Ireland is +28% above 2019 levels, while car traffic to Ireland (central and southern corridors) remains down on 2019 levels. There is no data available on car traffic to the island of Ireland from continental Europe at present.

Car Ferry Traffic	August 2022 % share of 2019
Northern corridor	126%
Central corridor	88%
Southern corridor	94%
Total	106%



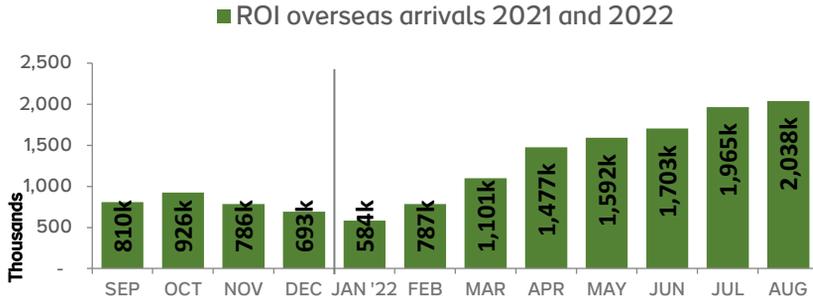
Performance to date



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 AUG 2022: **1.8m -10%**
YTD JAN-AUG 2022: **10.5m -19%**



ROI OVERSEAS ARRIVALS
LATEST AUG 2022: **201k -10%**
YTD JAN-AUG 2022: **768k -17%**

Republic of Ireland overseas arrivals January-August 2022

Main market area	Jan-Aug 2022 (000's)	% change '22/'19
Cross-Channel	3,894	-25%
North America	1,095	-25%
Mainland Europe	5,918	-12%
Rest of the world	340	-24%
Total Overseas	11,247	-19%

Latest available data from the CSO reported a total of 2,038,000 overseas arrivals into air and sea ports in the Republic of Ireland during August 2022 (this includes residents of the Republic of Ireland and Northern Ireland).

Arrivals data for August 2022 is at 90% of August 2019.

Source: CSO

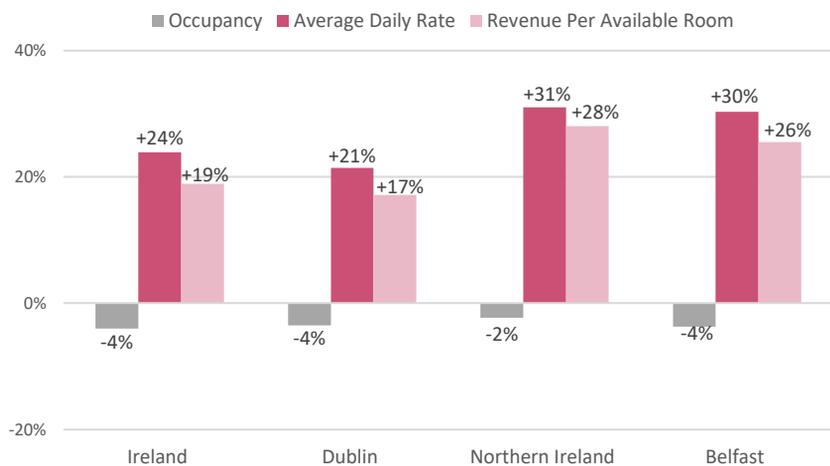
Hotel accommodation

Latest performance data from STR reports that hotel occupancy for August 2022 in Northern Ireland was -2% of August 2019. In Ireland, occupancy was -4% of August 2019.

The average daily rate (ADR) for a room in Northern Ireland in August 2022 increased by +31% to £108 and in Belfast by +30% to £106, when compared to the same period in 2019.

In Ireland, the average daily rate was up +24% to €175 in August 2022, when compared to same period in 2019. The average daily rate in Dublin for August 2022 was almost €182, up +21% on the same month in 2019.

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



ADR	€174.78	€182.35	£107.77	£106.24
Occupancy	86%	87%	82%	83%

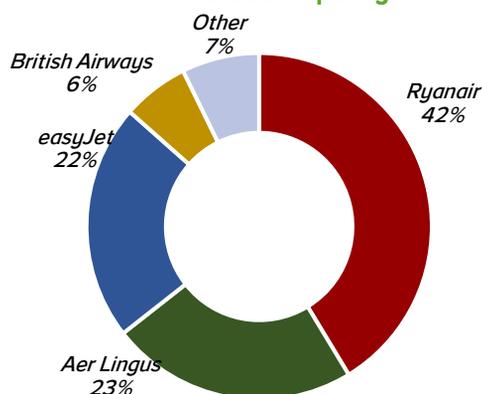
Note: Data include residents from the Republic of Ireland and Northern Ireland

ADR = Average Daily Rate

Source: STR August 2022

Access update

2022 October GB to IOI forecast seat capacity



Total seats: 1,009,300

News

- easyJet announced new routes to Belfast City from Bristol (September) and Glasgow (from end October) and recently added services from London Gatwick and Liverpool.
- Aer Lingus Regional (operated by Emerald Airlines) will launch new flights to Dublin from Southampton and Aberdeen from October.
- Flybe has announced a new winter schedule increasing services to Belfast City, including from Birmingham and East Midlands.
- Loganair has announced increasing capacity and lowering fares between Aberdeen and Dublin this winter and for the year ahead.
- Ryanair will launch a new route to Cork from Newcastle (from October).
- Heathrow airport's 100,000 passenger-a-day capacity cap has been extended until late October.

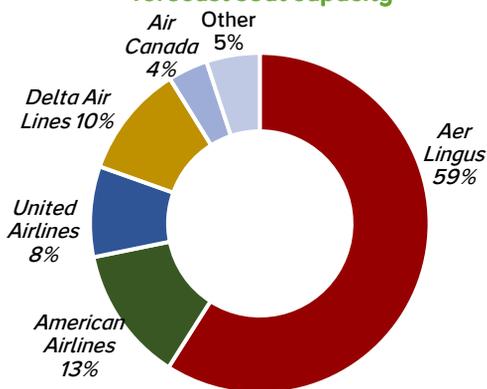
Market activity update

- The **fourth burst** of our **Green Button campaign** went live in September and will run until early November featuring radio, cinema, broadcast-video-on-demand (BVOD), digital and social.
- A new **Derry~Londonderry and Donegal campaign 'two unique places, one amazing holiday'** was launched in September. Activity includes out-of-home advertising (OOH), digital, social, co-operative partnerships (with Loganair, Ryanair, easyJet, Travelzoo and Tripadvisor) and a *Wanderlust* media partnership. Campaign is also supported by publicity and trade activity.
- **Island of Ireland co-op partnerships** with Aer Lingus, Ryanair, Stena Line, British Airways, Kayak and Expedia were live from September, to drive bookings to the island of Ireland in the shoulder months and winter season.
- **Media press visits** were recently hosted for titles including *The Telegraph*, *The Scotsman*, *Food & Travel*, *London Unattached* and *Country Living* magazine.
- **Other publicity highlights** include Wild Atlantic Way feature (*The Sunday Times*), Galway city break feature (*The Sun*) and Derry~Londonderry and Donegal feature (*Wanderlust* magazine).
- **BMW PGA Golf Championship at Wentworth** (7-11 September), when Tourism Ireland hosted six island of Ireland industry; approximately 100,000 golf consumers attended the event.
- **Trade fam trip** for 14 leading GB coach and group tour operators took place on 15-20 September. The itinerary included Derry~Londonderry, Donegal and Sligo, as well as a B2B workshop to meet with local tourism enterprises in Derry~Londonderry to discuss product and programming.
- **Trade partnership activity** with tour operators including Just Go! Holidays, National Holidays, Glenton Holidays, McKinlay Kidd, Barrhead Travel and Charitable Travel is live during September and October, highlighting autumn/winter packages.
- Tourism Ireland was the destination sponsor at the **Inteletravel Quest Conference** (29 September-1 October) hosting approximately 280 home-working travel consultants. Our sponsorship included a Belfast and Northern Ireland fam trip.
- **Meet in Ireland**: Tourism Ireland GB will host a **"North of England Retreat"** (6-7 October), when 12 island of Ireland industry partners will meet with 15 GB event agencies and MICE planners.
- **N.B:** Advertising and marketing activity was paused on 9– 21 September in respect of the passing of HM Queen Elizabeth II and some events were adapted or temporarily suspended to align with national guidelines.



Access update

2022 October NA to IOI forecast seat capacity



Total seats: 218,700

News

USA: Aer Lingus has announced a new transatlantic route for summer 2023 – its first service from Cleveland, Ohio, direct to Dublin Airport. The September/October period marks the end of several scheduled seasonal services operated by United (Washington DC and Chicago to Dublin; Newark to Shannon); American (Dallas, Charlotte and Chicago to Dublin) and Delta (Atlanta to Dublin). However, the overall access picture remains positive for winter 2022/2023, with all planned year-round routes running as scheduled. Projected winter 2022 capacity from the US is 102% versus 2019.

Australia: Qatar added a second daily flight from Melbourne through to Doha to connect to Dublin, from 1 October.

Market activity update

USA

- **The Green Button campaign** continues into autumn, with seasonal Halloween messaging and relevant tactical offers.
- **Wild Atlantic Way campaign** targeting cities with direct service to Shannon is live from September until November, featuring custom partner content, digital, outdoor, as well as tactical offers on Ireland.com and on leading travel and travel deal websites. Omni-channel campaign is supported by co-op airline campaigns with Aer Lingus and United, promoting direct flights from JFK, Boston and Newark, together with trade communications campaign. Tourism Ireland hosted two B2B events in New York and Boston in partnership with The Shannon Airport Group, attended by 80 US tour operator and media contacts.
- **Aer Lingus College Football Classic** in August featured gameday promotion with in-stadium signage and video spots during the live broadcast on FOX, with a record 4.41 million viewers.
- **Luxury advisor events:** Tourism Ireland and 10 industry partners participated in GTM, as well as in UltraSummit, meeting with 165+ luxury travel advisors mid-summer. 26 partners joined us in August at the annual Virtuoso Travelmart, attended by 5,000 luxury travel professionals.
- **Publicity:** Tourism Ireland hosted US travel guru Samantha Brown in September. The Emmy-winning host filmed at key locations in Northern Ireland and Limerick. Two shows will broadcast on the PBS network, available in 100 million homes nationwide.



Canada:

- **The Green Button campaign** continues with a strategic focus on off-peak travel and Halloween, including a tactical partnership with Travelzoo and sponsored content on CBC.
- **Media partnership** with Corus Entertainment will see strong broadcast and digital coverage throughout October on specialty channels – Food Network, W Network and History Channel.
- **Carrier and tour operator co-op campaigns** are highlighting competitive price points for autumn/winter travel with a burst of end-of-season and Black Friday sales.
- **Fam trip** to Ireland's Ancient East in October, in partnership with Indus Travels and Aer Lingus, is showcasing Ireland to 12+ group leaders promoting history, heritage and off-peak travel.



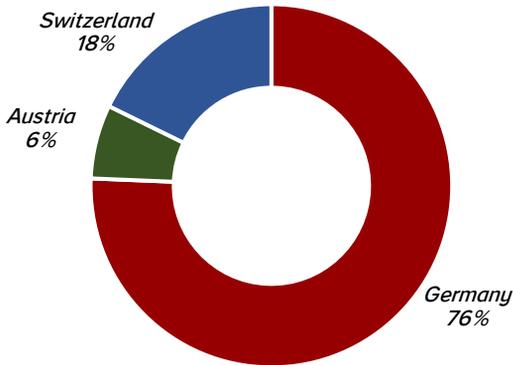
Australia:

- **The Green Button campaign** is running from September to November on online and social media channels, with an estimated reach of up to 10.7 million Australians.
- **TV project** with Guru Productions filmed two episodes in September, as part of its *Explore TV* series, highlighting Ireland's Ancient East, the Wild Atlantic Way and Northern Ireland; it will be broadcast on the 9 Network to more than 800,000 Australians in 2023.
- **Co-op campaigns** are confirmed with local trade operators, including Globus, Contiki and Trafalgar Tours, from mid-September to late October to promote all regions across the island of Ireland with tactical offers for the coach touring market segments.



Access update

2022 October Germany, Austria Switzerland forecast seat capacity



Total seats: 143,600

News

Germany: New Ryanair route Leipzig/Halle to Dublin twice weekly starting in November.

Switzerland: Planned new seasonal route Geneva to Cork with Swiss Airlines from 17 December to 25 March.

Austria: Aer Lingus Vienna to Dublin service operating five times weekly, since September. Ryanair new twice-weekly winter Klagenfurt to Dublin flight will run from November to March 2023 and Salzburg to Dublin runs weekly from December to March. Jet2 will have weekly Salzburg to Belfast flights from December 2022 to March 2023.

Market activity update

Germany

- **Lastminute.com campaign** is running since September and features dynamic packages and roundtrip offers from key German tour operators.
- **Ryanair campaign** is promoting flights to Dublin, Kerry and Knock, with online banners and radio campaign, as well as social media and email marketing.
- **Digital campaign with Eurowings** on the Google Display Network is promoting flights from Cologne and Düsseldorf to Dublin in autumn/winter.
- **TikTok group The Elevator Mansion** travelled to the Causeway Coast, Donegal and Dublin and released a paid YouTube video at the end of September. So far, their Instagram in-feed Ireland posts have reached 1.4 million (excl. Instagram Stories) and their TikToks from the island of Ireland reached 24.8 million views.
- **OTA campaign with Journaway** running from September is promoting off-season travel to the island of Ireland.
- **Co-op campaign** with new tour operator I Travel will run in October, targeting high spend consumers.
- **Media** – a dedicated 'Ireland' edition of *MERIAN* special interest travel magazine will be published in October.

Switzerland

- **Co-op access campaign with Edelweiss Air** running across social media channels to promote Zurich/Cork route.
- **Two group media visits** to Northern Ireland took place in September.
- **Media co-op** with new outlet TravelMagazin about the island of Ireland's culinary specialities – distributed during the "Food Zurich" festival in September and supported by a podcast on travelmagazin.ch.
- Tourism Ireland and eight industry partners attended the **Adventure Travel World Summit** in Lugano in early October.
- Tourism Ireland will promote the island of Ireland at the **"Fernweh" consumer festival** in Berne on 29-30 October; highlights will include Céilí dance performance and trade support from Ireland specialist AG Traveltrend.

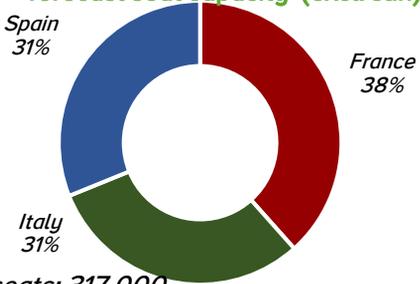
Austria

- **OTA campaign with Lastminute.com** running since September to promote travel to the island of Ireland for the autumn/winter period.
- **Co-op campaigns with Service Reise** to promote group bus tours to the island of Ireland for 2023.
- **Group press trip** to promote new Klagenfurt/Dublin flight which starts in November.
- **Dedicated press trips** will promote music in Belfast.



Access update – Southern Europe

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



News

France: Vueling's seasonal Paris-Shannon service runs from Sept to Mar 2023 and Paris-Cork into winter 2022/2023

Ryanair announced a new Paris-Belfast route from March 2023.

Italy: Ryanair's new route from Milan-Belfast run from next spring, establishing new direct access from Italy.

Spain: Brittany Ferries' new LNG-powered cruise ferry serving Bilbao-Rosslare will run from Nov. Ryanair will offer new access from Asturias-Dublin from Nov.

Market activity update

France

- **Co-op campaigns** with Ryanair promoting access to Cork & Dublin, while Brittany Ferries and Irish Ferries campaigns are promoting low and shoulder season travel.
- **Workshops** include Tourmag Bordeaux, Lyon & Toulouse with 60 key trade partners.
- **Visiteurs roadshow** welcomed 40 trade agents in Sept.
- **IFTM Paris** - 14 industry partners joined Tourism Ireland to promote the island of Ireland at France's largest trade fair.
- **Cazoo Opem de France** saw Tourism Ireland and partners promoting our world-class golf.
- **Experience Point-to-Point campaign** promoting direct access to WAW from Paris to Cork and Shannon and via ferry from west of France, includes DOOH, social media and digital programmatic; live during Sept-Oct.
- **City Breaks campaign** promoting autumn short breaks to **Dublin & Belfast** on social media, digital programmatic, with audio ads on a selection of podcasts, DOOH and through a media partnership; live during Sept-Oct.

Spain

- **City Breaks campaign** promoting Dublin and Belfast will run until the end of Oct across social media (Facebook, Instagram, Pinterest), programmatic video display (YouTube, Seedtag, Acuity) and display banners, geo-targeting Madrid, Catalonia and Northern regions.
- **Co-op campaigns** run during Sept and Oct include airline activity with Ryanair promoting regional access (Cork, Knock & Shannon) via Catalonia, and Dublin via Madrid, reaching millions of potential visitors across radio and digital.
- **OTA campaigns** with Atrápalo and Logitravel are active to drive business for Q4. Promotional campaign with leading travel retailer B Travel is live across print and CTV formats as well as extensive coverage across their agency network promoting longer-stay city breaks and island of Ireland packages.

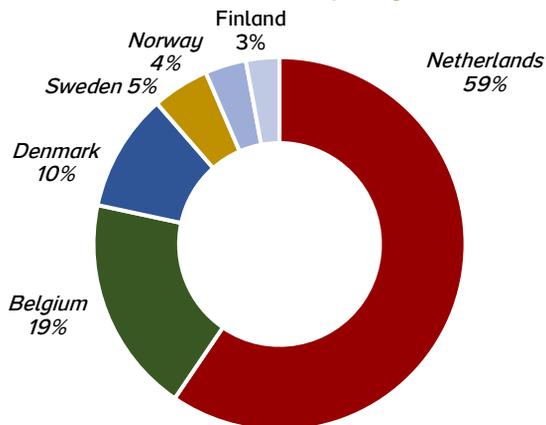
Italy

- **Co-op campaigns** with Logitravel in Oct and with Ryanair running Sept-Nov. Joint event on in Oct promoting new routes and winter routes to Cork, Knock, Dublin and Shannon.
- **Tradeshows:** Tourism Ireland attended TTG Rimini 13-15 Oct and IGTM Rome 17-20 Oct
- **Citybreak campaign** from Sept-Nov featuring Dublin, Cork and Belfast and features digital and social media, and 2 jumbo trams will be branded in Milan in Oct/Nov.
- **Twining region campaign with Kerry** will include a key influencer trip in Nov.
- **Luxury social media campaign** supported by luxury trade workshop in Rome on 12-15 Nov.
- **"Ireland: island of voices" literary events with six Irish authors** at the Mantova Literary Festival with the island of Ireland featuring on national TV, showcasing destination videos, with live streaming, social content and print media and radio coverage.
- **Exclusive 'Ireland' edition of In Viaggio** printed magazine with 120 pages dedicated to the island of Ireland highlighting our key themes and iconic landscapes.
- **6 episodes of TV show "Andata e ritorno"** dedicated to Ireland was broadcasted weekly on Alma TV in Aug-Sept as result of a media visit in cooperation with Tourism Northern Ireland.



Access update

2022 October Northern Europe to IOI forecast seat capacity



Total seats: 134,000

News

Belgium and the Netherlands:

- Ryanair will close its Brussels Zaventem base this winter (two aircrafts); this is expected to have a marginal impact on the number of flights to Dublin.

Nordics:

- Eurowings has announced flights from Copenhagen, Stockholm and Gothenburg to Dublin via Düsseldorf for the coming months.
- Ryanair will suspend its Gothenburg to Dublin service from the end of October. (Restart date tbc.)

Market activity update

Belgium and the Netherlands:

- **Green Button City Break campaign** is running in the Netherlands and Belgium from August until October across YouTube, paid social, display banners and branded content. Partnership with &C Lifestyle, is highlighting city breaks in Dublin and Belfast, supported by four influencer visits to Dublin and Belfast. A campaign with Skyscanner promoting city breaks to Dublin went live in early October.
- A **co-op campaign** with Ryanair is running in September and October, promoting flights from Belgium and the Netherlands to Dublin.
- **Co-op campaign with Expedia** promoting ease of access to Cork is live during September and October.
- **Tourism Ireland's B2B workshops** in Brussels and Amersfoort welcomed 15 industry partners from the island of Ireland, who connected with more than 40 Belgian and Dutch tour operators and travel agents.
- **Halloween themed media event** takes place on 31 October, with 40 key journalists and influencers invited; the event will celebrate Ireland's connection with Halloween and highlight key themes for 2023.

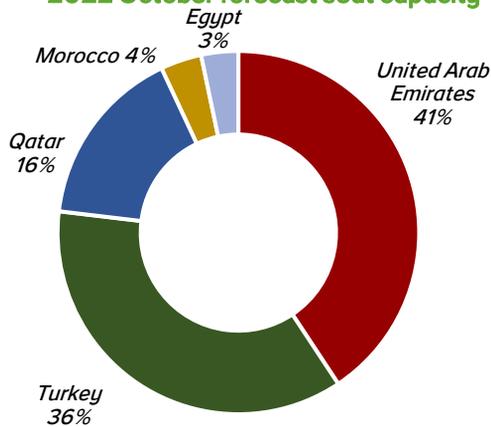


Nordics:

- **Green Button City Break campaign** live in the Nordics during September and October across YouTube, social and native ads, highlighting city breaks in Dublin and Belfast. It was supported with an influencer visit from each Nordic market showcasing city breaks.
- **God Morgen Norge**, a popular breakfast show in Norway with a daily audience of 700,000, broadcast live from the Guinness Storehouse and Viking Splash Tour in August.
- **Farmer seeking love**, filmed during the summer in Huntington Castle and featuring activities such as horse riding, foraging and whiskey tasting, was broadcast in Denmark across two episodes on 27 September and 4 October.
- **Ryanair co-op activity** promoting three routes to Dublin (Copenhagen, Billund and Gothenburg) went live in September.
- **Co-op campaigns** with leading tour operators such as AirTours and Stena Line were actively promoting travel to the island of Ireland during Q3.
- The **'Made in Himmerland' golf tournament** in September, with industry partners, highlighted our fantastic golf product.
- **Halloween events** targeting media and trade will take place in Stockholm and Copenhagen, highlighting Ireland as the Home of Halloween and showcasing key themes for 2023.

Access update

2022 October forecast seat capacity



Total seats: 77,200

News

Middle East: Emirates has returned to a double-daily service from Dubai to Dublin.

China: From 5 December, British Airways will resume flights between London and Hong Kong, with four flights per week, to increase to daily flights from 19 December, with onward connections to the island of Ireland.

India: Virgin Atlantic and Aer Lingus have a codeshare for Heathrow to Ireland flights, improving connectivity to Ireland from India. Virgin Atlantic and Indigo have signed a codeshare agreement so passengers can connect to seven additional cities from Delhi and Mumbai.

Market activity update

Global Inbound:

- **Flavours of Ireland** will take place on 26 Oct, hosting 60 island of Ireland industry partners and more than 100 global inbound operators and wholesalers.
- **ITB Asia** – Tourism Ireland will showcase the island of Ireland at this prestigious travel event in Singapore on 19-21 Oct.
- **Global European Market** event will take place on 3-4 Nov, providing a platform for industry from the island of Ireland to meet with global inbound operators and wholesalers.
- **Partnerships:** Tourism Ireland is continuing to work with Miki Travel, AC Tours and Kuoni Tumlare this autumn/winter, to deliver a series of virtual training webinars and online marketing activities to top-selling travel agents in South-East Asia and China.

Middle East:

- Tourism Ireland's **Green Button autumn campaign** resumed in Sept and includes programmatic display, social media and radio.
- Tourism Ireland joined the **Travel Counsellors Conference 2022** in Sept, meeting with 75 UAE-based Travel Counsellors.
- An **ultra-luxury fam** with four luxury tour operators visited the island of Ireland in September.
- **TFest** takes place in Dubai on 3-6 Oct with 15 industry partners attending.
- **Co-op campaign** with Dnata Travel includes in-store activations, digital channels, print and radio advertising.

China and India:

- **Co-op campaign with Chinese social media platform Sina Weibo** is ongoing since Sept and has reached more than 60 million to date.
- **Media event** in collaboration with NI Bureau in China is themed around screen tourism in Northern Ireland.
- **ITB China Industry Meet-Up** returned to Shanghai on 21 Sept and Tourism Ireland and partners showcased Ireland to more than 400 Chinese travel trade.
- **Digital marketing campaign** to promote the 2030 ICC Men's T20 World Cup, which Ireland will co-host with England and Scotland. A series of videos starring Kevin O'Brien and Rohan Gavaskar were produced in collaboration with DFA and Cricket Ireland and will run in Q4 to showcase the island of Ireland to potential travellers in India.
- **OTM, one of India's biggest trade shows**, saw Tourism Ireland meeting with 50 travel agents to promote the island of Ireland, in September.
- **Media** – coverage in *Architectural Digest*, *National Geographic Traveller* and *Motoring World* following a series of press visits. *Elle* magazine will visit the island of Ireland in Dec with another top tier press trip taking place in Nov.



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