

SOAR

(Situation & Outlook Analysis Report) February 2023



The International Monetary Fund (IMF) expects the global economic slowdown to be less pronounced than previously anticipated, as inflation appears to have peaked in 2022. Consumer spending remains robust and the energy crisis following Russia's invasion of Ukraine has been less severe than initially feared. However, the global economy still faces major headwinds.

The [European Commission](#) has said that the EU is set to narrowly avoid a recession this year, as inflation eases and gas prices continue their steep drop, paving the way for better-than-expected economic performance.

Oxford Economics forecasts the US economy to suffer a mild recession in 2023 and its outlook for the UK economy is similar.



A strong restoration of direct air access capacity to the island of Ireland is scheduled for the upcoming summer season. Based on latest OAG filings, scheduled air seat capacity to the island of Ireland for June 2023 will be 102% of June 2019 levels, with almost 2.7 million seats scheduled. Seat capacity from GB and Mainland Europe is filed at 107% and 98% of June 2019 levels respectively.



Latest data from the CSO shows a total of 17.3 million arrivals (including residents of the Republic of Ireland and Northern Ireland) to air and sea ports in the Republic of Ireland during 2022. This represents 86% of 2019 levels.

STR reports that hotel occupancy on the island of Ireland was 58% for the month of January 2023, a +2% increase on the same month in 2019. The average daily rate was almost €130, a +30% increase on January 2019.



Tourism Ireland's new global campaign – Fill your heart with Ireland – will go live this March in our key markets around the world. The campaign is all about dialling up what differentiates the island of Ireland from other destinations – communicated through various celebrities and advocates, who share what fills their hearts with Ireland. The campaign will urge holidaymakers in our overseas markets to chose the island of Ireland in 2023. Tourism Ireland continues to work closely with the industry on the island of Ireland and trade partners in our key markets, to build on strong relationships that will generate business for 2023 and beyond.



The [European Travel Commission](#) (ETC) predicts Europe's tourism rebound will continue in 2023. The latest data indicates a recovery of 75% of 2019 travel volumes to Europe in 2022. Despite the economic outlook, this strong tourism rebound is expected to continue well into 2023, though at a slower pace. Transatlantic travel, aided by the strength of the dollar against the euro, is expected to continue to perform well to Europe. Looking forward, international travel to Europe is forecast to reach pre-pandemic levels in 2025.

Economic Conditions



Great Britain

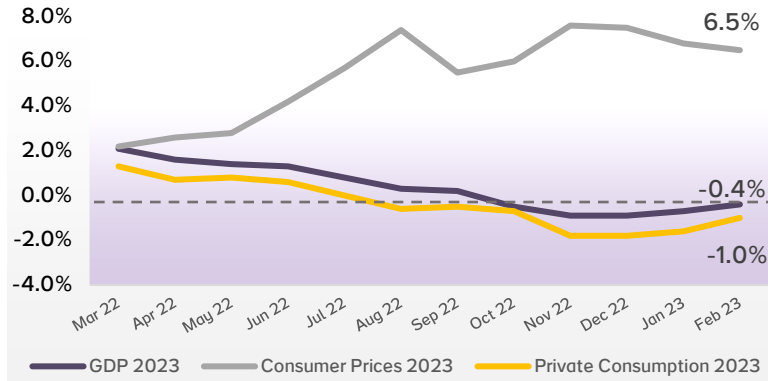
The outlook has improved and Oxford Economics has revised its 2023 GDP forecast up, but recession remains likely. Its latest forecast is for GDP to shrink by -0.4% this year, up from an expected decline of -0.7% last month. The upward revision reflects the impact of historical revisions that suggest the economy had greater momentum coming into the year and the likely support to household spending power from further declines in gas prices.

Exchange rate

Feb '22 £1 : €1.20 Feb '23 £1 : €1.12

2023 Economic Outlook by Oxford Economics trended by month

Source: Oxford Economics

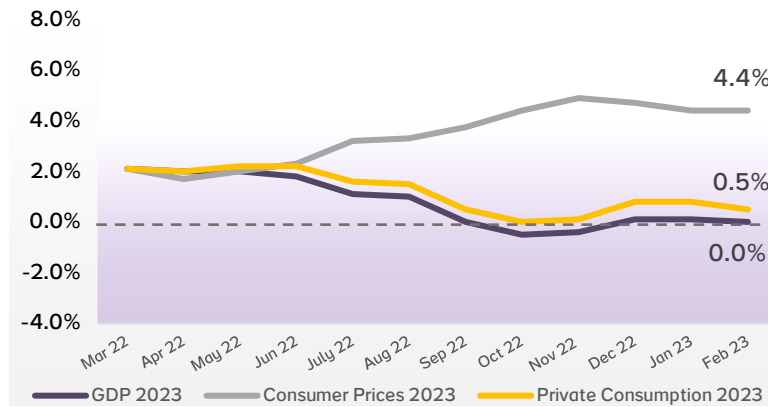


US

The US is forecast to experience a mild recession in 2023, driven by the Fed's tight monetary policy. Recent economic data signal the economy entered 2023 on a weak footing, though the labour market remains resilient. Oxford Economics expects the recession to start in Q2 as consumers limit spending and businesses cut back on hiring and investment. Flat GDP growth is forecast in 2023.

Exchange rate

Feb '22 \$1 : €0.88 Feb '23 \$1 : €0.94
Feb '22 \$1 : £0.74 Feb '23 \$1 : £0.84

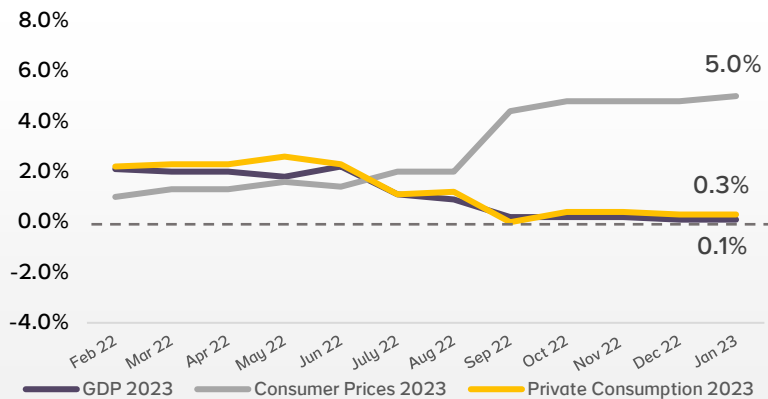


France

Dropping energy prices and abundant gas reserves have led Oxford Economics to predict a milder downturn. Despite the improved outlook, the economy is forecast to grow only +0.1% in 2023. Total consumption will be limited by the impact of elevated inflation, as households have continued to cut back on goods consumption. Inflation will likely average 5% this year.

Exchange rate

Feb '22 €1 : £0.84 Feb '23 €1 : £0.89

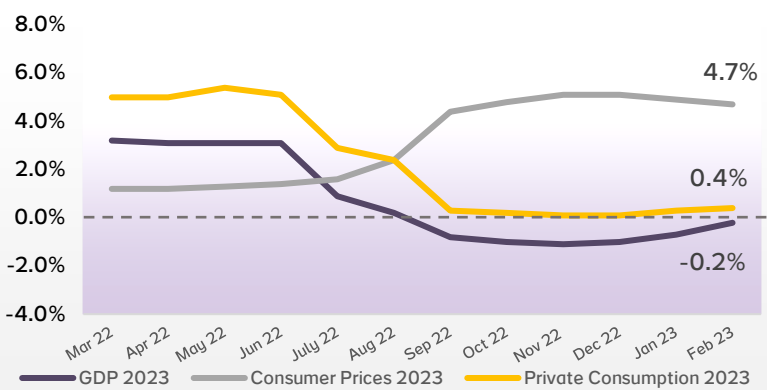


Germany

The German economy fell into recession at the end of 2022. This weak momentum at year end makes another contraction in Q1 2023 likely. Retail sales dropped in Q4 2022, as inflation impacted real incomes and consumer confidence. Nonetheless, the outlook for the rest of 2023 has improved, aided by the fall in wholesale gas and electricity prices; and inflation, which rose in January, has likely peaked. Overall, the outlook is improving.

Exchange rate

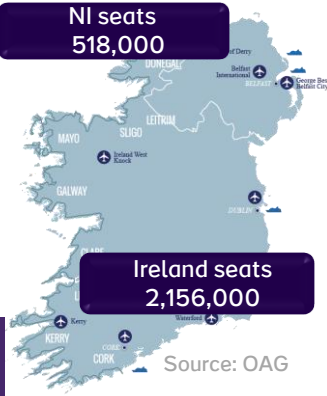
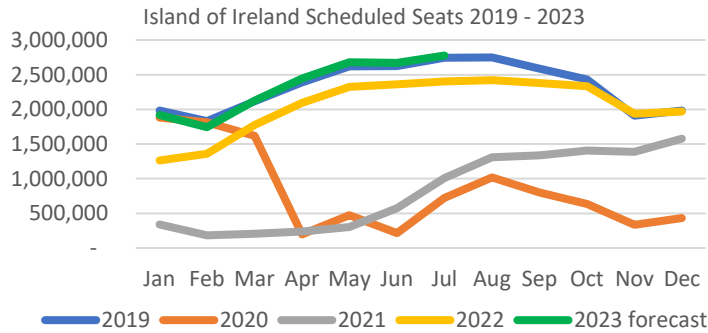
Feb '22 €1 : £0.84 Feb '23 €1 : £0.89



Island of Ireland Access Situation



June 2023 Forecast Seat Capacity

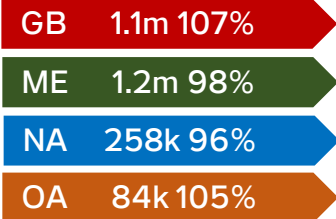


A strong restoration of direct air access capacity to the island of Ireland is scheduled for June 2023. Based on latest OAG filings, air seat capacity to Ireland is planned at 101% of June 2019 levels, with Northern Ireland scheduled at 104%.

Seat capacity to the island of Ireland for June 2023 is scheduled at 102% of the level it was in June 2019.

Air Access June 2023 forecast – % share of 2019

IOI Seat Capacity



Connectivity for June 2023 is scheduled close to 2019 levels. Seat capacity from GB and Mainland Europe is filed at 107% and 98% of June 2019 levels respectively. Airlines are scheduled to operate close to 16,000 flights in June 2023.

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

Airports Forecast – June 2023

Cork and Dublin airports are currently filed to return to 103% and 100% of their respective 2019 seat capacities. Belfast City Airport and Belfast International Airport are filed at 85% and 112% respectively.

Even with economic and geopolitical uncertainties, the demand for air travel continues to recover around the world. While the capacity outlook is very positive for June 2023, it is difficult to predict at this stage if the scheduled seat capacity will fully materialise.

Airports	June 2019 Seats	June 2023 Seats	2023 % share of 2019
Belfast Intl.	345,138	386,893	112%
Belfast City	143,037	121,511	85%
City of Derry	11,224	9,702	86%
Dublin	1,806,963	1,804,669	100%
Cork	158,269	163,229	103%
Shannon	98,188	114,367	116%
Knock	46,064	54,606	119%
Kerry	17,388	18,711	108%
Donegal	726	0	0%
Total	2,626,997	2,673,688	102%

Ferry Performance – January 2023 v January 2019

The latest available performance data is for January 2023 and shows ferry passengers to and from the island of Ireland at 97% of January 2019 levels. Performance data from Spain is not available.

Ferry Passenger Traffic	January 2023 % share of 2019
Northern corridor	119%
Central corridor	79%
Southern corridor	68%
French corridor	186%
Total	97%

Ferry	Jan 2019	Jan 2023	2023 % share of 2019
GB - island of Ireland			
Sailings	1,752	1,492	85%
Passengers	226,053	215,810	95%
Cars	60,159	64,509	107%
France - Ireland			
Sailings	34	72	212%
Passengers	4,985	9,279	186%
Cars	1,855	2,754	148%

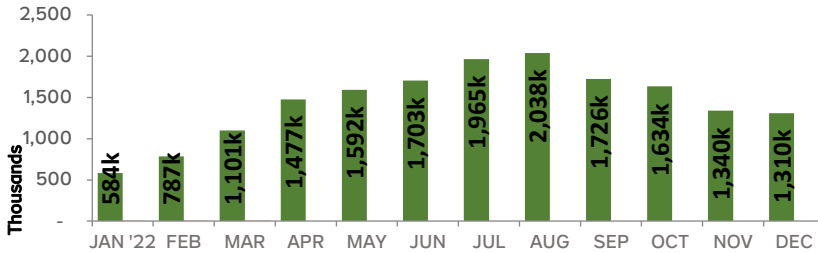
Sources: OAG and Ferrystat

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 % share of 2019



ROI OVERSEAS AIR ARRIVALS
JAN-DEC 2022: **16.2m 86%**



ROI OVERSEAS SEA ARRIVALS
YTD JAN-DEC 2022: **1.1m 86%**

Republic of Ireland overseas arrivals January-December 2022

Main market area	Jan-Dec 2022 (000's)	2022 % share of 2019
Cross-Channel	6,052	79%
North America	1,715	80%
Mainland Europe	8,930	92%
Rest of the world	561	87%
Total	17,257	86%

The latest available data from the CSO shows nearly 17.3 million overseas arrivals to air and sea ports in the Republic of Ireland (this includes residents of the Republic of Ireland and Northern Ireland) in 2022.

Arrivals data for 2022 was at 86% of 2019 levels.

Source: CSO

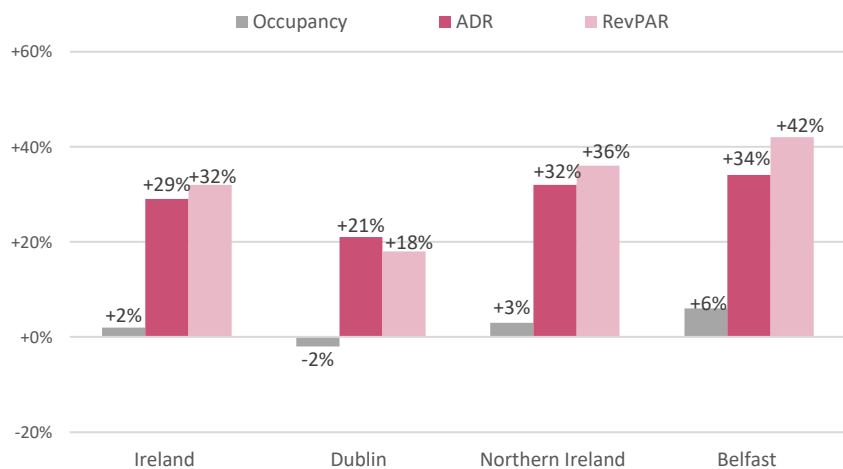
Hotel accommodation

Latest performance data available from STR reports that hotel occupancy for January 2023 in Northern Ireland was 54%, +3% on January 2019. In Ireland, occupancy was 59%, +2% on January 2019.

The average daily rate (ADR) for a room in Northern Ireland in January 2023 increased by +32% to £88 and in Belfast by +34% to £87, when compared to the same period in 2019.

In Ireland, the average daily rate was up +29% to €133 in January 2023, when compared to same month in 2019. The average daily rate in Dublin for January 2023 was €139, up +21% on the same month in 2019.

Island of Ireland Hotel Performance January 2023/January 2019 % change



ADR	€133	€139	£88	£87
Occupancy	59%	64%	54%	55%

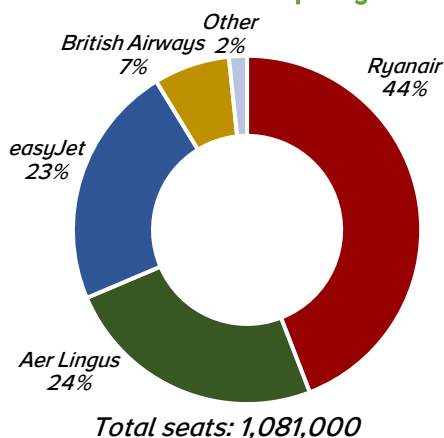
Note: Data include residents from the Republic of Ireland and Northern Ireland.

ADR = Average Daily Rate

Source: STR 2023

Access update

June 2023 GB to IOI forecast seat capacity



News

- Regional carrier Flybe ceased trading in January 2023; however, the airline's routes between GB and Northern Ireland are being serviced by other carriers.
- Ryanair has announced new summer 2023 routes: Cardiff to Belfast, Edinburgh to Belfast, Liverpool to Shannon, East Midlands to Cork and Cornwall Newquay to Dublin. There will also be increased frequencies on several key Ryanair routes.
- Aer Lingus has announced a new service from London Heathrow to Ireland West Airport Knock.
- Emerald Airlines' summer 2023 schedule includes new services from Newcastle, Nottingham East Midlands and Cornwall Newquay to Belfast. It has also increased frequencies on services from Glasgow, Edinburgh and Southampton to Dublin; and from Manchester and Birmingham to Belfast.

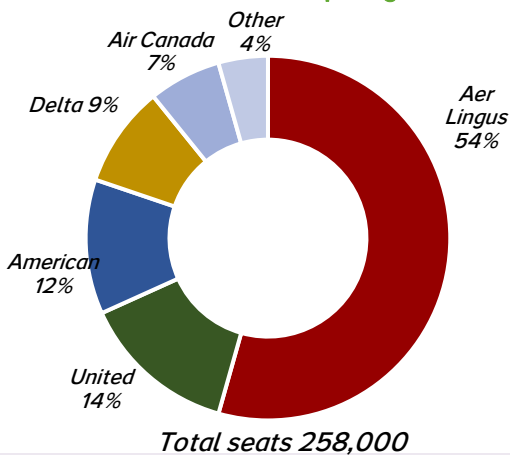
Market activity update

- The year commenced with a **Green Button kickstart campaign**, reaching 50% of GB adults.
- Our **Northern Ireland – Embrace a Giant Spirit (NIEAGS)** campaign is live (Jan-Mar) across outdoor, BVOD (broadcast video on demand), cinema, digital and social channels; it also includes media partnerships with *The Telegraph* and *The Times* (in Scotland), as well as influencer activity.
- NI – EAGS air and sea co-operative activity** includes campaigns with easyJet, British Airways, Ryanair, Loganair, Stena Line and P&O Ferries, as well as partnerships with TripAdvisor and Skyscanner.
- Our **Celtic Connections B2B Workshop** took place in Glasgow (January), where over 30 industry partners from the island of Ireland met 24 GB tour operators to drive business.
- The **Coach Tourism Association (CTA)** held its annual two-day conference and workshop in Belfast (February), in conjunction with Tourism Ireland and Tourism Northern Ireland.
- Key **Meet in Ireland B2B** events have included MICEBOOK Expo London (January); Moulden Marketing Destination Showcase (February) and Association Conference Showcase (February).
- Co-operative marketing** campaigns in February included activity with Glenton Holidays, Leger Holidays and Shearings, to promote spring and summer travel.
- Golf campaigns** with golfbreaks.com and YourGolfTravel using the Made for Golf brand are live during February and March; a Scotland focused digital campaign is also under way.
- Media visits and coverage** included *The Banshees of Inisherin* (*National Geographic Traveller*); the Great Western Way and Game of Thrones Studio Tour (*The Week's 2023 Travel Bucket List*); Wexford and beyond (*The Sun*); Cork (*Tatler's 2023 Travel Guide*); New Year's Festival (*Showbiz* magazine, *Viestra Magazine*); Tradfest was covered in *The Irish World*, *The Irish Post* and *Fused*; St Brigid in the *I*; Valentines by Press Association; NI EAGS in *Women's Weekly* and *Sainsbury's magazine*.
- Broadcast:** *Travel Man: 48 hours in Dublin* (C4); *Adrian Dunbar: My Ireland* (second airing).
- St Patrick's Day** will premiere the TV launch of our new Fill your heart with Ireland campaign. Other activity includes St Patrick's Day Festival and diaspora events in London and Glasgow, a media event, PR and influencer activity and a Business Tourism workshop.



Access update

June 2023 NA to IOI forecast seat capacity



News

USA: American Airlines will commence its Dallas to Dublin service in early April, due to high demand. The new Aer Lingus Cleveland to Dublin service starts on 19 May, while its re-instated Hartford to Dublin service re-starts on 26 March. United Airlines will re-instate its daily Chicago to Dublin service on 26 May.

Canada: WestJet has removed all European routes from Eastern Canada (including Halifax to Dublin and Toronto to Dublin) in 2023, as part of a strategic refocus back on Western Canada. A service from Calgary to Dublin is scheduled to operate this summer.

Market activity update

USA:

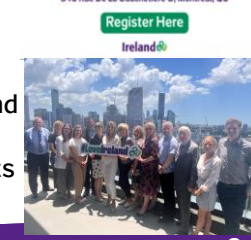
- **Green Button Q1 campaign** will be live until the end of March across programmatic, social media, custom content, online video and connected TV.
- Tactical **partnership programme** campaign to turn 'lookers into bookers' launched in mid Feb, featuring 17 partners via paid social and across premium third-party travel deal websites.
- **Best of Ireland sales mission:** 15 island of Ireland industry partners and four US tour operators participated in our B2B events in Dallas, Houston, Denver and Los Angeles in February, with 300 top travel advisors in attendance.
- **Belfast UNESCO Showcase Events (Boston and New York):** Tourism Ireland and Northern Ireland travel partners hosted two business workshops and a press reception, followed by a networking event for key contacts and a music showcase to highlight Belfast's UNESCO City of Music accreditation.
- **Aer Lingus co-op activity:** wave one of a joint campaign promoting off-peak spring deals to Shannon and Dublin was live this January, reaching an audience of 32 million. Wave two will go live in March, promoting autumn off-peak deals.
- **Screen tourism:** a joint event with Searchlight Pictures promoting **The Banshees of Inisherin** to 200+ top media, influencer and academy voters in Los Angeles took place on 22 February.
- **Publicity:** Tourism Ireland hosted a media event in Los Angeles, with 60 top tier media attending, including PBS TV, Los Angeles Times and *Santa Monica Mirror*.
- **NBC New York** travelled to Ireland in February, to film eight vignettes to be broadcast on WNBC during the NYC St Patrick's Parade; these will reach 8 million households in NYC.

Canada:

- **Green Button Q1 campaign** is live until end of March. We will also launch a tactical media campaign featuring seven airline, operator and industry partners via partnership programme.
- **Co-operative campaigns:** live from Feb including Air Canada Vacations, Approach Tours, Indus Travel; airline co-op campaigns with Aer Lingus and WestJet are set to go live in March.
- **Trade sales mission:** (27 Feb-2 Mar) 20 industry partners will participate in events in London (ON), Ottawa (ON), Montreal(PQ) and Halifax(NS), meeting 350 travel advisors and media.

Australia and New Zealand:

- **Green Button campaign** launched mid-February for six weeks, utilising Facebook, Instagram and banners. New podcast ad launching around the campaign, running on podcasts with a potential audience of over 8 million.
- **PCS:** World Pride will be in Australia for the first time, launching this February. We will be utilising PCS that aligns with pride messaging and linking back to Ireland.com. Tourism Ireland also attending Fair Day consumer event for Mardi Gras with the Irish Consulate.
- **2023 Ireland Sales Mission (Feb 13-21)** our four-city mission with B2B trade and media events in Brisbane, Sydney, Melbourne and Auckland. Nine partners from the island of Ireland attended.

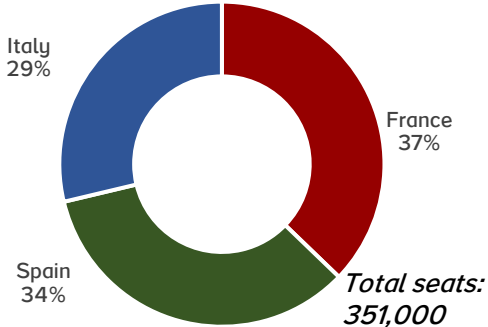


Southern Europe – France, Spain and Italy



Access update – Southern Europe

June 2023 France, Spain, Italy forecast seat capacity (excl. sun)



News

France: Ryanair has a new route from Paris to Belfast, operating from March.

Italy: A new Ryanair route from Belfast to Milan will commence in March 2023. Both Aer Lingus and Ryanair will operate new services this summer from Brindisi to Dublin; and Aer Lingus has a new Olbia to Dublin route.

Spain: Ryanair will operate a Valencia to Belfast service from May to October.

Market activity update

France

- Our **NI EAGS campaign** is live until mid-March, with outdoor ads running in prime locations in the greater Paris region and on digital and social platforms.
- A **TV campaign** is running from early February until 17 March, including around the broadcast of the Ireland/France Six Nations rugby match. Also, outdoor ads are running in the top access cities around France, as well as digital and social activity, including catch-up TV.
- Our **trade and media event in Cherbourg** to showcase Ireland's South-East took place in mid-February. The focus was on ferry access and seven journalists attended.
- **Co-op campaigns** with Ryanair promoting the new Paris to Belfast route; and with Stena Line and Brittany Ferries promoting ferry access.
- **Co-op events** with Abbey Tours to showcase Northern Ireland in Paris and Lyon and an event in partnership with group specialist TO Partir in March.



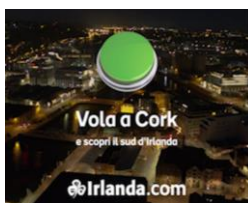
Italy

- **Digital and TV spots**, one-month exposure during Six Nations tournament to promote the South of Ireland and ease of access to Cork. Embassy event in Rome with key trade and media for rugby game.
- **Joint in-market launch events** with Disney in Milan around *The Banshees of Inisherin*. This included a media event and an influencer preview event with 20 creators (potential reach of 5 million).
- Second year of **Ireland Week** in Milan around St Patrick's Day, with 50+ events to showcase culture, music, literature, food, produce and experiences of the island of Ireland.
- Our **Fill your heart with Ireland campaign** will kick off at the end of March across Italy.
- **Trade webinar about Ireland's festivals and events** (St Patrick and Halloween) together with VisitBritain (Coronation and Eurovision) took place on 28 February.
- **TV crew media trip** for La7 (national TV) filmed in Northern Ireland in mid-February.



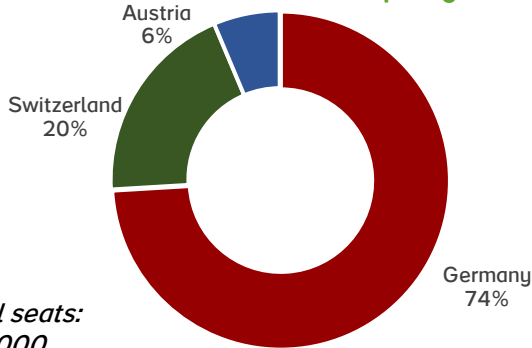
Spain

- A **two-page piece in La Vanguardia** promoting *The Banshees of Inisherin*, proactive content push published in key online media, as well as advertising on YouTube. **Collaboration with Disney and Cine Yelmo** to promote the film with 25" video showing across cinema and social.
- **Media and influencer visits** in Q1 include *National Geographic* featuring Dublin, musician Roi Méndez visiting Game of Thrones Studio Tour and Belfast, as well as *Aquí La Tierra* (programme on TV1) to broadcast St Patrick's Day content.
- Our **trade sales mission**, with 10 industry partners from Ireland meeting with up to 200 key travel trade and media in Madrid, Bilbao and Barcelona, commenced on 28 February.
- **Semana de Irlanda** (Ireland Week) will include activation with Metro Madrid featuring takeover of the San Bernardo metro and cultural offerings across the metro network featuring literature and music in celebration of St Patrick's Day.
- **New spring advertising campaign** – Irlanda llega a tu corazón – running for 10 weeks across multiple channels including Connected TV, outdoor, online video and social media, with a focus on the key gateways of Madrid, Barcelona and Bilbao.



Access update

June 2023 Germany, Switzerland, Austria forecast seat capacity



Total seats:
146,000

News

Germany: A new route with Lufthansa from Frankfurt to Belfast will commence in April.

Market activity update

Germany

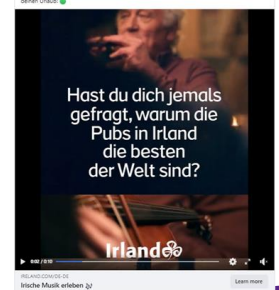
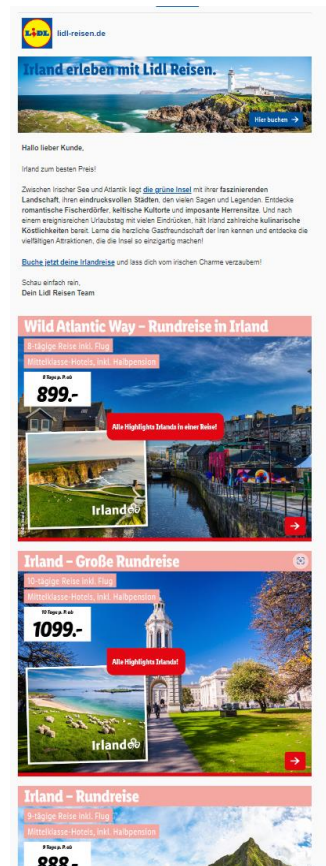
- Our **Green Button kickstart campaign** – including programmatic video and display banner advertising, social media ads as well as TV, Connected TV and Addressable TV – went live in Q1.
- Our **Northern Ireland campaign** is promoting the new Lufthansa flight from Frankfurt to Belfast. A Green Button Northern Ireland campaign on digital channels ran throughout February.
- The **CMT fair in Stuttgart** took place in January, with 265,000 visitors over 10 days and 15 island of Ireland industry partners in attendance.
- **Riverdance promotion tour** kicked off on 15 February and will run until the end of March; five events will be attended by key travel trade and media, as well as a promotional film and competition for all shows in 30 cities across Germany.
- **Partnerships** have been under way with Lufthansa City Centre (travel agency franchise) and Lidl Reisen in February, as well as with I Travel and DERTOUR Reisebüro, focused on generating new business for 2023 and beyond.

Switzerland

- Attended the **FESPO travel fairs** in Zurich and Bern.
- Collaborated with Department of Foreign Affairs on **St Brigid's event**.
- **OTA (online travel agency) co-op activity** and **paid content seeding** is focused on driving business for the island of Ireland this year.
- **Advertorials** with SWISS Airlines are promoting Cork in French-speaking cantons.
- **Press visits to the island of Ireland** have been organised for Tier 1 media, including *Neue Zürcher Zeitung*, *TCS*, *Südostschweiz* and *Magazingolf.ch*.

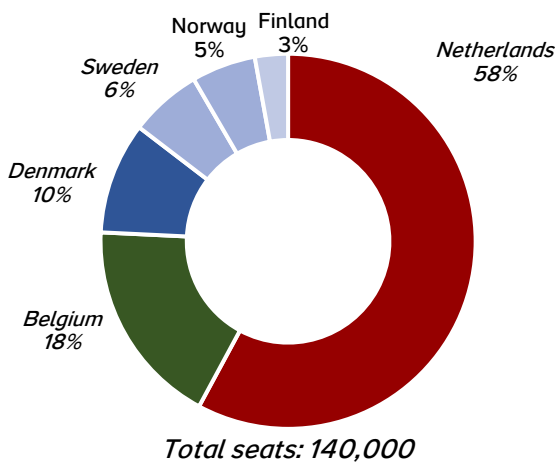
Austria

- **Consumer and trade advertorials** are piggy-backing on Riverdance tour.
- **Tour operator offers** being curated for Ireland.com.
- First-time tour operators have been recruited for **Meitheal**.



Access update

June 2023 Northern Europe to IOI forecast seat capacity



News

Nordics: Widero will begin its new twice-weekly (Thursdays and Sundays) Bergen to Dublin route on 27 April.

Ryanair's flight from Stockholm to Dublin, from early March until the end of October, will operate three times a week.

Market activity update

Belgium and the Netherlands:

- **Northern Ireland Embrace a Giant Spirit (NIEAGS)** campaign live Feb and March on YouTube, digital and paid social, plus partnership with Skyscanner.
- **Camping campaign** on social channels, linking in with the growing popularity of caravanning and camping in these markets; this is in addition to a barter deal with Goboony, a camper rental platform in the Netherlands and Belgium.
- **Co-operative** campaign with ANWB Reizen was live from January, including an insert in *De Kampioen* magazine, six pages in *Reizen Europa* magazine, as well as ads on Facebook and in newsletters.
- **Publicity:** Extensive articles published following media visits in *Trouw* (NL), *De Morgen* (Be) and *L'Echo* (BE) on *The Banshees of Inisherin* and Wicklow. *Lonely Planet* (NL) ran an article on Co Cork; Belfast featured in *Villa D'Arte* (NL); and *Soundz* (NL) and *Sud Presse* (BE) covered Tradfest.
- **Full programme of St Patrick's Day activity and events** will take place during March; this will include the launch of *Ireland* (IMAX movie) and an Ireland photo exhibition in The Hague.

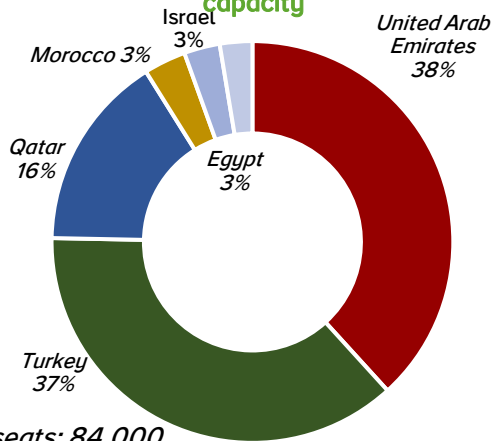
Nordics:

- **Screen tourism:** digital campaigns leveraging *The Banshees of Inisherin* and the new season of *Vikings Valhalla* which is very popular across the Nordics.
- Our **annual trade workshop** in conjunction with VisitBritain took place in Copenhagen in February, with 22 industry partners from the island of Ireland and 50 Nordic trade partners attending.
- Recent **publicity** coverage included a five-page spread in *Vi Menn*, Europe's largest men's lifestyle magazine, with a readership of 220,000.
- **Co-operative activity** in Q1 included a digital campaign with Tradfest and Swedish tour operator Rolf's Buss.
- **Activity around St Patrick's Day** will include a sponsorship with Swedish radio station Rock Klassiker, which will broadcast its morning show live from Dublin on St Patrick's Day; other activity will include media events in Copenhagen and Stockholm on 15-17 March.



Access update

June 2023 Emerging Markets forecast seat capacity



Total seats: 84,000

News

Israel: El Al Israel Airlines will launch its new direct flight from Tel Aviv to Dublin on 16 March. It will operate three weekly flights all year round.

China: British Airways will resume daily flights between Shanghai and London Heathrow from 23 April. Flights between Beijing and London Heathrow will operate four times per week from early June. Virgin Atlantic's daily flights from Shanghai to London Heathrow will resume on 1 May.

Market activity update

Global Inbound:

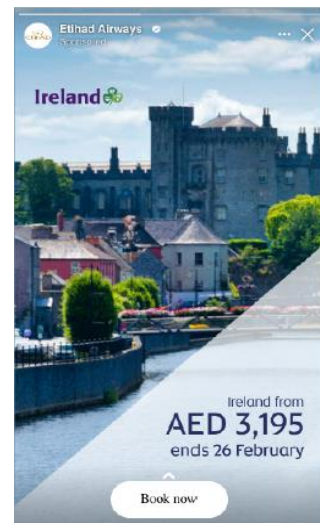
- The **Britain and Ireland Marketplace workshop and networking evening** was attended by almost 50 island of Ireland industry partners.
- Our **partnership campaign** with AC Tours focused on promotion across digital and social media and included educational webinars and itinerary developments.
- **Educational webinar series** with Miki Travel will begin in March.

Middle East:

- **Ethihad co-op multi-channel tactical price-led campaign** to increase bookings on the Abu Dhabi to Dublin route around Eid holidays in April. The campaign will run on digital display, social media and radio and will also include email marketing.
- **Dnata Travel co-op multi-channel campaign** with digital, social media, radio, in-store POS (point of sale) digital TV screens, in-store lightboxes, printed collateral, competition to the island of Ireland and Emirati Ambassador trip to the island of Ireland.
- **Dnata Travel Ahlan Arabia roadshow** two-day trade workshop in Dubai with Dnata Travel, which will include one-to-one meetings with key travel trade.
- **St Patrick's Day activities** will include key trade and media attending the Embassy of Ireland event, as well as an Ireland parade in Abu Dhabi.
- **Media visit** by *Vogue* magazine in April to Ireland.

China and India:

- The new Chinese version of the **Ireland Specialist Mini Programme** will go live.
- **Live-streaming with Expedia TAAP** will target 80 travel trade attendees.
- Tourism Ireland and key trade and media partners will attend the **St Patrick's Day events and receptions** organised by the Irish Embassy in Beijing and the Irish Consulate in Shanghai.
- **Embassy of Ireland St Patrick's Day activities** – the Embassy of Ireland and Consulate will host St Patrick's Day receptions in Mumbai, Delhi and Calcutta. Tourism Ireland will attend with key travel trade and media.
- **Film premieres in conjunction with the Consulate of Ireland in Shanghai** of *The Banshees of Inisherin* and *An Cailín Ciúin* with media and trade.



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