



Murlough Beach, Co Down

SOAR

(Situation & Outlook Analysis Report)
February 2022

- There is growing optimism in the tourism and hospitality sector in Ireland, as COVID-19 restrictions were lifted on 22 January. Bars and restaurants can now operate at full capacity, with no requirement for digital Covid certificates, and full attendance is permitted at all indoor and outdoor events. Mask-wearing will still be required on public transport, in taxis and at stations/airports/ports. There are no changes to the [current measures in place for international travel](#).
- From 1 February 2022, vaccine certificates for primary vaccination series will not be accepted for travel to Ireland if more than 270 days have passed since the final dose. Vaccine certificates based on booster/additional doses are not time limited.
- Northern Ireland has also relaxed restrictions with regard to indoor hospitality and has adopted optional mask-wearing. Covid certs are no longer required for entry to bars and restaurants, although they will continue for international travel, as well as for nightclubs and indoor events with more than 500 people. Northern Ireland ministers will consider lifting remaining restrictions on 10 February.
- While the global travel and tourism industry continues to experience the ongoing impact of the pandemic, there is growing optimism. International borders are re-opening and there are good vaccination and booster rates in most key source markets, providing a welcome return of international tourism. Global tourism sources are expecting a more positive performance for tourism in summer 2022, with Q1 2022 already seeing an uplift in travel and a release of pent-up demand.
- The latest update on sentiment from the European Travel Commission (ETC) reports that overall travel-related sentiment remains positive globally and has begun to rise again in most regions.
- According to the World Bank's latest Global Economic Prospects report, global growth is expected to decelerate from 5.5% in 2021 to 4.1% in 2022 and 3.2% in 2023. The spread of COVID-19 variant, alongside inflation, debt and inequality intensifies uncertainty.
- Access data from OAG shows scheduled air seat capacity to the island of Ireland this February will be down by only -21% when compared to February 2019. Car traffic on ferries to the island of Ireland from Great Britain was down by -25% during Jan-Nov 2021 when compared to 2019, with a -55% decline in traffic to Ireland, while Northern Ireland car traffic from Great Britain grew by +16%.
- Tourism Ireland has extensive targeted campaigns active in key overseas markets. Our 'Green Button' campaign is live with the message that the island of Ireland is open for business and welcoming visitors. Our comprehensive marketing programme is highlighting key motivating themes across all markets as we prepare for the release of pent-up travel demand. We are working closely with overseas tourism partners in the markets, as well as industry on the island of Ireland, to stimulate demand, capture early bookings and 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 17-23 January 2022, new COVID-19 cases increased by +13% in the European Region (10M). The number of new cases has continued to rise in Europe since mid-December 2021. However, weekly deaths decreased by -5% in Europe (21K). Globally, the number of new COVID-19 cases increased by +5% to 21M, the highest number of weekly cases recorded since the start of the pandemic across the six WHO regions. However, new deaths remained similar to the previous week. Ireland and the UK have been able to reduce or remove restrictions recently because, although case numbers have been high, hospitalisations and deaths have not been rising as quickly, due to the nature of the Omicron variant.

Europe and Key Markets' Situation



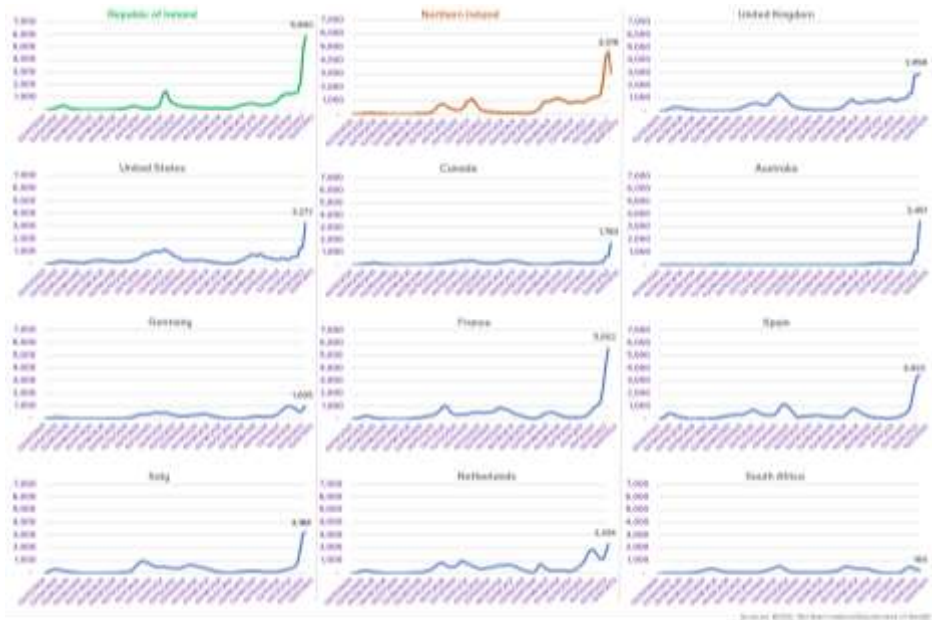
The European Centre for Disease Prevention and Control (ECDC) reports that, for the week ending 16 January 2022, the overall epidemiological situation in the EU/EEA was characterised by a high overall case notification rate that has increased rapidly in the past four weeks, and an elevated but stable death rate. The rapid spread of the Omicron variant continues. It notes that, as countries currently adopt heterogeneous testing strategies and face varying constraints on their ability to test, underestimation of case notification rates should not be excluded.

The latest weekly 14-day incident rate per 100k of the population in our key markets shows that all markets that we monitor within Europe, except Northern Ireland, experienced increases in cases for the week to 10 January 2022. The largest increases were seen in France (+1,289), Ireland (+971) and Denmark (+899).

The Republic of Ireland saw an increase of +20% to 5,900 per 100k. While Northern Ireland saw a -35% decrease to 3,018 per 100k.

Source: ECDC and Northern Ireland Department of Health

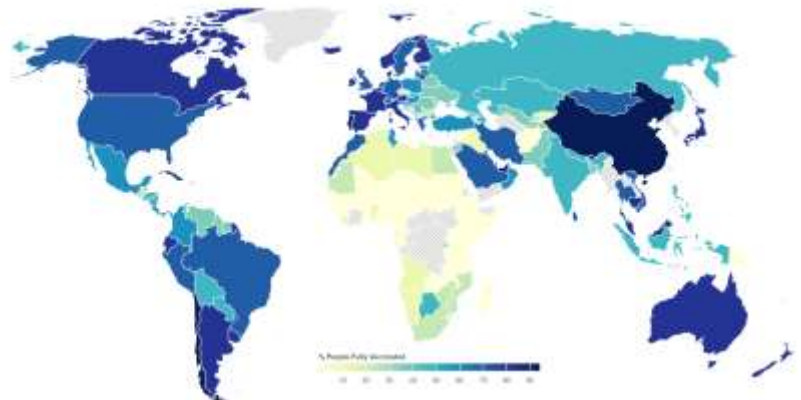
Weekly, 14-day notification rate of newly reported COVID-19 cases per 100k population up to W/C 10/01/2022



Vaccination Progress

60.3% of the world population has received at least one dose of a COVID-19 vaccine to date. However, only 9.4% of people in low-income countries have received at least one dose.

In Ireland, 95% of the adult population are fully vaccinated, with 80% having received a booster dose. In Northern Ireland, almost 82% of people aged 12+ are fully vaccinated and almost 58% have received a booster dose.



Source: John Hopkins University and Medicine 21 January 2022



The global economy entered 2022 in a weaker position than previously expected, with the International Monetary Fund's January 2022 update of their [World Economic Outlook](#) report forecasting that global growth will moderate from +5.9% in 2021 to +4.4% in 2022. The spread of the Omicron variant, rising energy prices and supply disruptions have resulted in higher and more broad-based inflation than anticipated.



However, the WTTC has predicted a strong recovery of the European travel and tourism sector in 2022. The sector is already seeing a surge of more than +250% in European bookings for Easter 2022 when compared to 2021, while summer bookings are currently +80% above last year's levels. The organisation has called on governments to reduce all travel restrictions and allow fully vaccinated travellers to move freely.



Latest data from travel intelligence company Forward Keys shows that, during Q1 2022, intra-European travel saw a +275% surge in bookings, while international arrivals to European destinations will see a more than +280% increase on the same period in 2021. Spain is poised to be the most popular destination for European travellers, with intra-European arrivals to Spain during Q1 2022 currently up by +320% (YOY), followed by Turkey.

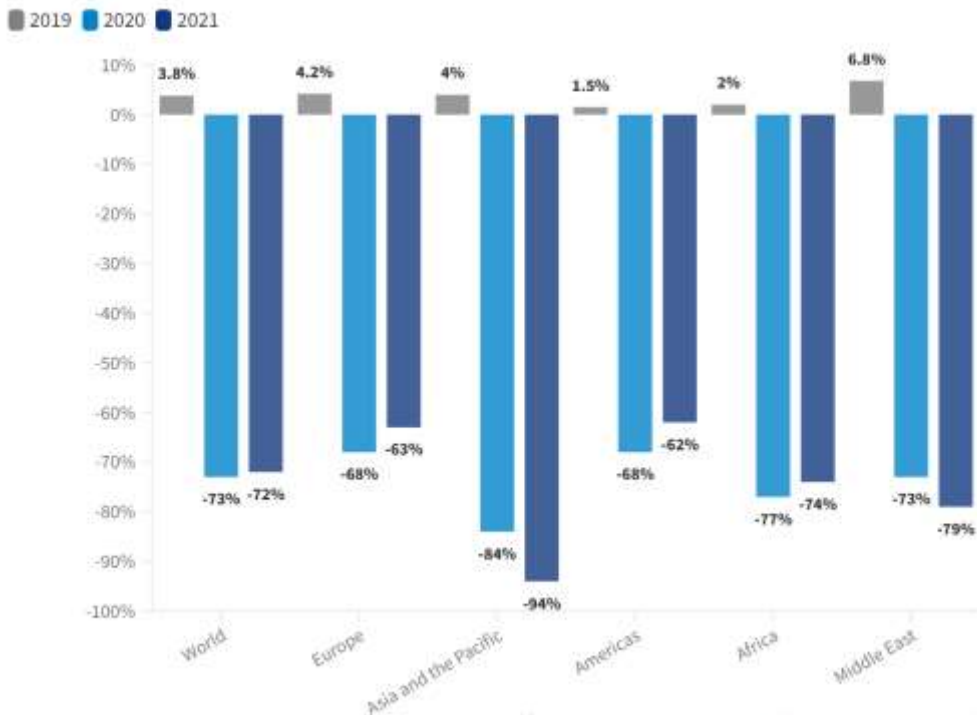


Latest data from EUROCONTROL shows flights on 12 January 2022 were 63% of 2019 levels, decreasing over two weeks (-19%). Over the first weeks of 2022, European traffic recorded major flight reductions as the Omicron wave expanded, slackening the expected recovery. Intra-European traffic was down -39% vs 2019.



According to the UNWTO, latest preliminary estimates show global tourism experienced a +4% upturn in 2021, when compared to 2020 (415 million versus 400 million). However, international tourist arrivals (overnight visitors) were still -72% below the pre-pandemic year of 2019. This follows on from 2020, the worst year on record for tourism, when international arrivals were down -73%.

International Tourist Arrivals % change



Source: World Tourism Organization (UNWTO) © • * Change over 2019 (provisional data)
Data as collected by UNWTO, January 2022. Published: 16/01/2022

Economic Conditions



Great Britain

Oxford Economics has cut its near-term growth forecast, with the recent surge in COVID-19 cases causing greater consumer caution and forcing large numbers of people to isolate. However, it is forecasting a strong rebound and now expects GDP growth of +4.5% in 2022. Its forecast for 2023 has been nudged down to +2.7% from +2.8%.

Exchange rate

Jan 21 £1: €1.12 Jan 22 £1: €1.20

US

The US economy will undergo a delicate rebalancing act in 2022, according to Oxford Economics. It expects the rapid spread of the Omicron variant to lead to a Q1 lull in economic activity but foresees a spring rebound led by in-person services sectors. It anticipates real GDP will grow +4.0% in 2022. However, risks are tilted to the downside, given an unresolved health situation, a growing fiscal drag and a more hawkish Federal Reserve.

Exchange rate

Jan 21 \$1: €0.83 Jan 22 \$1: €0.88
 Jan 21 \$1: £0.74 Jan 22 \$1: £0.73

France

Oxford Economics sees consumption in Q1 slowing slightly more than in December, but still expects it to rebound strongly from Q2 and during the summer, more than offsetting the weakness over the winter months. Overall, it still forecasts French GDP growth of +3.7% in 2022 after an estimated +6.7% in 2021, with 2023 expansion then seen at +2.2%.

Exchange rate

Jan 21 €1: £0.89 Jan 22 €1: £0.83

Germany

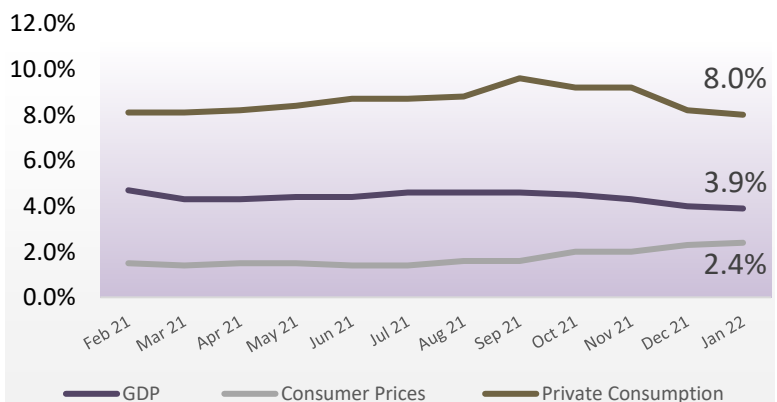
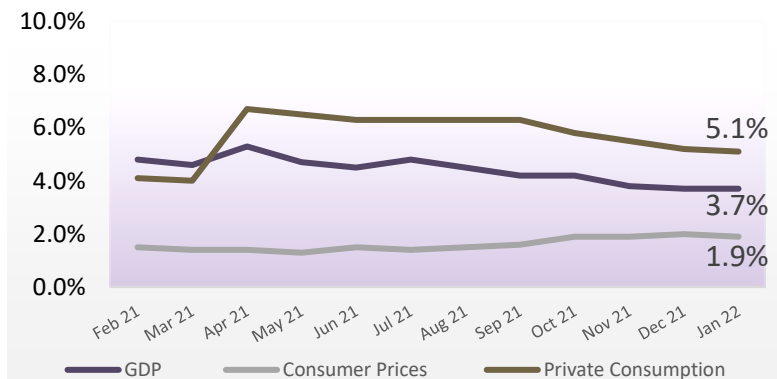
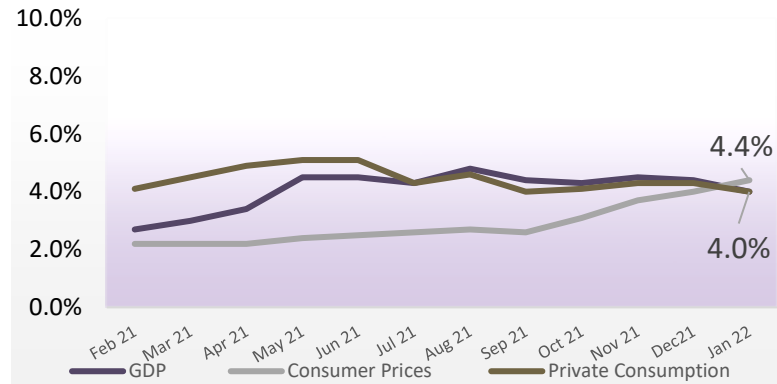
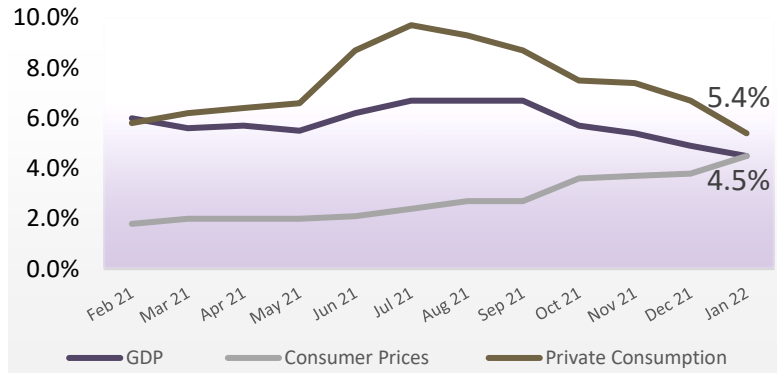
A weak start to 2022 means Oxford Economics has nudged down its GDP forecast for this year to +3.9% from +4.0% in December, after preliminarily-reported growth of +2.7% in 2021. However, the outlook for 2022 remains solid. Growth in 2023 is seen at +2.9%. A surge in car output suggests that supply bottlenecks have begun to ease and consumption should bounce back as infections slow and restrictions ease.

Exchange rate

Jan 21 €1: £0.89 Jan 22 €1: £0.83

2022 Economic Outlook by Oxford Economics trended each month

Source: Oxford Economics

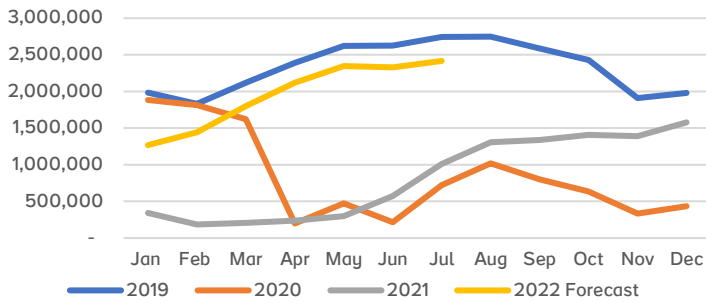


Island of Ireland Access Situation



Access To date

Island of Ireland Scheduled Seats 2019 - 2022



Based on current data from OAG, scheduled air seats capacity to the island of Ireland for February 2022 will be down by -21% compared to February 2019. However, compared to 2021, seat capacity will increase by over +685%.

Note: It is important to recognise that the access situation remains volatile and spring air access schedules will depend heavily on the COVID-19 situation in our source markets.

Air Access February 2022 v 2019

IOI Seat Capacity

GB 713k -25%

ME 652k -12%

NA 73k -37%

OA 23k -42%

IOI Seats

1,443,000
-21%

Flights 8,131 -29%

Airports 136 -4%

Carriers 35 -18%

Seats from Mainland Europe and GB are expected to be down -12% and -25% respectively this February, compared to February 2019. North America is scheduled to see a -37% decline on February 2019. Eight fewer carriers are expected to service the island in February 2022 compared to 2019.

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

Airports February 2022 v 2019

February Seats
% change 22 v 19

NI Seats
283,576 -27%

Ireland Seats
1,159,516 -19%

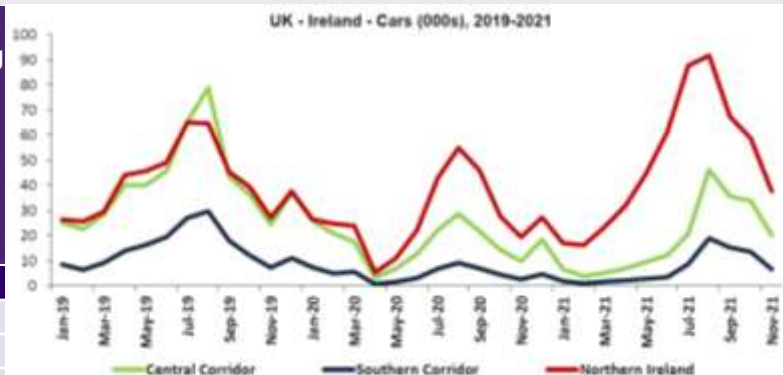
Sources: OAG

Airports	February Seats 2019	February Seats 2022	% change 2021 v 2019
Belfast City	265,258	200,017	-25%
Belfast International	114,900	76,685	-33%
City of Derry	9,684	6,874	-29%
Dublin	1,250,358	1,002,432	-20%
Cork	96,830	77,088	-20%
Shannon	50,004	44,608	-11%
Knock	30,658	24,804	-19%
Kerry	11,340	10,584	-7%
Donegal	396	0	-100%
Total	1,829,428	1,443,092	-21%

Ferry Performance 2021 v 2019

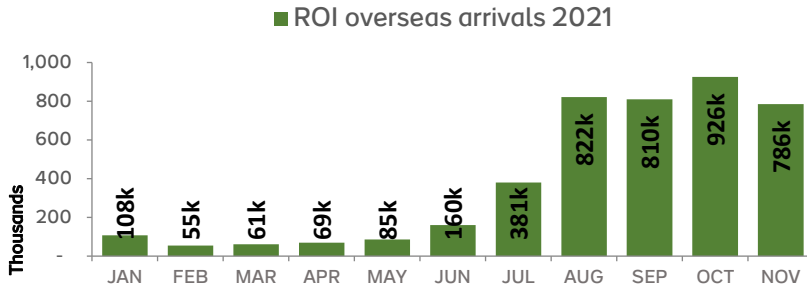
The number of cars travelling on ferries to the island of Ireland from GB was down by -25% during January-November 2021 compared to 2019. There was a -55% decline in traffic to Ireland (central and southern corridors) over this period. Traffic to Northern Ireland grew by +16% in 2021 over 2019. There is no data available on traffic to the island of Ireland from continental Europe at present.

Car Ferry Traffic	% change Jan–Nov 21 v 19
Northern corridor	16%
Central corridor	-56%
Southern corridor	-55%
Total	-25%



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 NOV 2021: **755k -42%**
YTD JAN-NOV 2021: **3.9m -78%**



ROI OVERSEAS ARRIVALS
LATEST NOV 2021: **31k -32%**
YTD JAN-NOV 2021: **388k -66%**

Republic of Ireland overseas arrivals January – November 2021

Main market area	Jan-Nov 2021 (000's)	% change '21/'20	% change '21/'19
Great Britain	1,409	-19%	-80%
Mainland Europe	2,496	+19%	-73%
North America	216	-27%	-89%
Rest of the world	142	-13%	-76%
Total Overseas	4,263	-1%	-77%

Latest data from the CSO reported a total of 786,000 overseas arrivals into air and sea ports in the Republic of Ireland during the month of November 2021 (this includes residents of the Republic of Ireland and Northern Ireland). This represents an increase of +656% when compared to November 2020 and -42% decrease on November 2019.

For the eleven-month period of January-November 2021, the Republic of Ireland recorded 4,263,000 arrivals, representing a decline of -1% on 2020 and -77% on 2019.

Source: CSO

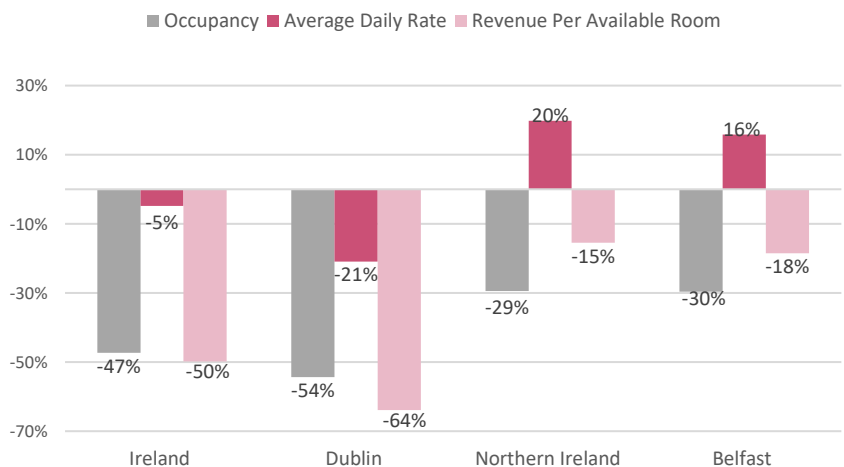
Hotel accommodation

End of year data for 2021 from STR reports that hotel occupancy in Northern Ireland was down by -29% between January and December 2021 when compared to 2019. In Ireland, occupancy for 2021 was down -47% on 2019 levels.

The average daily rate for a room in Northern Ireland in 2021 increased by +20% to £94 and in Belfast by +16% to £90, when compared to 2019 rates.

In Ireland, the average daily rate was down by -5% to €122 for 2021, when compared to 2019. The average daily rate in Dublin during 2021 was €113, down by -21% on 2019.

Island of Ireland hotel performance Jan - Dec 2021/2019 % change



	Ireland	Dublin	Northern Ireland	Belfast
ADR	€122	€113	£94	£90
Occupancy	41%	38%	50%	51%

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

ADR = Average Daily Rate

Source: STR December 2021

Market and trade intelligence

- The easing of additional travel requirements has provided a welcome kick-start to 2022, during what is traditionally considered a peak booking period. A surge in demand for outbound travel is expected now that COVID-19 testing after arrival is no longer required for double-vaccinated travellers, from 11 February.
- Reports of surges in bookings and enquiries following the relaxation of restrictions show strong consumer demand across a variety of holiday sectors – from last-minute ski to short-haul winter sun hotspots. Many tour operators have also launched their 2023 programmes early, with competitive pricing and booking incentives to encourage forward bookings.
- The TripAdvisor/Ipsos MORI ‘Travel in 2022’ report reveals that 47% of UK adults surveyed said that their top reason to travel in 2022 would be to visit friends and relatives (VFR). The same report also cited that leisure travel intent in the UK is up by +5% for 2022 when compared to 2019 for destinations abroad and has increased by 8% for domestic leisure travel.
- Turn-of-year marketing campaigns and TV adverts have returned, albeit on a smaller scale. Flexibility, security and added-value messaging are combined with inspirational content, helping pique pent-up consumer demand.
- GB tour operators and OTAs (online travel agents) are looking forward to a more stable year with cautious optimism. For some operators, the island of Ireland outperformed previous record booking levels at times during 2021. However, this was offset at other times by huge operational changes, cancellations or significant year-on-year declines, with all-Ireland trips proving challenging due to differing regulations.
- Despite reasons for optimism, the months ahead are expected to be not without challenges, with general sentiment summarised as ‘cautiously optimistic’ given the ongoing long-term impact of COVID-19 and the prospect of further potential changes.
- British travel industry organisations continue to lobby the UK government for a clear, long-term recovery plan and approach for dealing with ongoing COVID-19 risks.

Market activity update

- During Q1 2022, the GB market will activate the next phase of the Green Button campaign, as well as a dedicated Green Button / Embrace a Giant Spirit Northern Ireland campaign.
- Campaigns will be supported by TV, BVOD (broadcaster video-on-demand) and outdoor advertising, media partnerships, access marketing, trade platforms, digital, social and publicity activity.
- Both campaigns will focus on driving demand and bookings and will be seen by millions of people across GB.
- Work is under way for a programme of activity to mark St Patrick’s Day across GB. The market will also be promoting new product, accolades and key events for 2022 from across the island of Ireland, such as Belfast UNESCO City of Music, the opening of the Game of Thrones® Studio Tour, Dublin featuring in the *Lonely Planet* list of top 10 cities to visit in 2022 and *Ulysses* centenary, amongst many others.
- Events for leisure and MICE and training updates are planned during Q1 2022. These will provide opportunities for GB trade and industry to discuss 2022 plans, as well as to generate leads and secure future business.
- Tourism Ireland’s extensive publicity programme for 2022 in GB has commenced, generating positive media coverage for the island of Ireland via a programme of media visits and targeted media outreach activity.

Access update

- The end of 2021 saw the announcement of new routes for 2022, including Inverness to Dublin (Loganair) and Birmingham to Knock, East Midlands to Dublin and Manchester to Cork (Ryanair).
- In January, Emerald Airlines – the exclusive operator of the Aer Lingus Regional route network – announced a new base out of Belfast City Airport during 2022, with high frequency routes planned from key GB cities. The carrier also announced accelerated plans to offer services to the island of Ireland from Newquay Cornwall and Exeter, as well as Edinburgh and Glasgow flights to Dublin.
- Flybe announced Birmingham Airport as its base and plans to begin operating regional flights from spring 2022.
- Irish Ferries won ‘Best Ferry or Fixed Linked Operator’ at the UK Group Leisure & Travel Awards 2021.

Market and trade intelligence

USA:

- While COVID-19 continues to impact consumer sentiment in the short-term, the longer-term outlook is more positive, with strong travel demand and overall intent. A January report from Destination Analysts also shows that 80% of US travellers have trips planned for 2022, with an average of three leisure trips planned.
- Tour operators report strong bookings for the island of Ireland for 2022, with flexible booking policies remaining in place. Golf operators are also seeing an increase in new enquiries for 2022 and beyond, due to pent-up demand.
- Sources report an increase in luxury enquiries with clients booking longer stays, upgrading itineraries, increasing spend on accommodation and also adding extra experiences and private guides/drivers.

Canada:

- Overall market sentiment is muted, with government travel advisory to avoid non-essential travel outside Canada still in place. The EU removed Canada from its safe travel list on 17 January. Some leading escorted tour operators are considering delaying the season start until May 2022, due to prevailing uncertainty.

Australia:

- Outbound travel sentiment continues to gain positive momentum, with H2 forecast to see a strong restart in travel to Europe. However, ongoing COVID-19 concerns remain and sources report a softening in bookings over December/January. Operators are seeing stronger demand and more positive sentiment from younger clients.

Market activity update

USA:

- The Green Button campaign restarts hybrid TV (linear, VOD and Connected TV), programmatic video/display, social media and partnerships with leading travel and travel deals websites including Travelzoo, Trip Advisor, Dunhill, Shermans and Travelspike.
- A co-op digital and radio campaign is under way with Aer Lingus to stimulate travel between February and May. Tactical co-op activity is also under way with key operators and in planning with other airline partners.
- Key in-person trade events include attendance at PGA Golf Show in Orlando, with 24 island of Ireland partners, as well as leading travel and adventure shows in Boston and Los Angeles in early March.
- The new *Ireland* IMAX film narrated by Liam Neeson will launch in Q1; there will be promotional events in key cities through Q1/Q2.
- Tourism Ireland's strategic partnership with Riverdance for its 25th anniversary tour kicks off in March and will feature inspirational island of Ireland video content on screen before each performance.
- Publicity highlights include a live *Access Hollywood* broadcast from the new Game of Thrones Studio Tour in February, live 24-hour broadcast from Bunratty Castle on QVC (shopping channel with over 100 million subscribers) in March, a satellite media tour in March – targeting at least 20 US stations, as well as influencer activity.

Canada:

- The Green Button campaign is scheduled to launch in late February, driving tactical offers across social, programmatic display and Connected TV. Co-op campaigns are currently under way with Aer Lingus; and Q1 campaigns are scheduled to launch with Transat and WestJet to drive summer travel.
- A media partnership with Corus Entertainment is set to launch in Q1, focusing on niche interest channels such as The Food Network, W Network and The History Channel.

Australia:

- A trade media reassurance campaign is running, together with inspirational co-op campaigns with Collette and Insight Vacations. Upcoming activity includes virtual B2B activity with island of Ireland industry.

Access update

- **USA:** Summer 2022 will see the return of direct air services from 13 gateways in the US to Dublin and three gateways to Shannon (JFK, Newark and Boston).
- **Canada:** 2022 sees the return of direct air services from five Canadian gateways, with year-round access from Toronto with Aer Lingus and Air Canada, seasonal routes from Transat (April-October) and WestJet (May-October). Seasonal routes will operate from Vancouver with Air Canada; and Calgary/Halifax with WestJet.
- **Australia:** British Airways is returning to Sydney in Q1, with daily London/Sydney flights set to resume by the end of March. Emirates continues to operate daily flights to Dubai from Sydney and Melbourne.

Market and trade intelligence

Germany:

- Trade partners report positive interest in Ireland but a reluctance to book at present due to continuing uncertainty regarding restrictions and regulations in Germany.
- Local sources report that consumer sentiment in Germany is positive, with an eagerness in the market to travel again. However, flexibility and ease of travel remain critically important, with tour operators building flexibility into their packages to encourage early bookings.
- There is optimism that holiday bookings will pick up from March, on the FIT side at least, with hopes for at least 50% of 2019 numbers to the island of Ireland.
- Group-wise, the situation is more difficult to read and late bookings are the standard. However, one of the biggest group tour operators is optimistic and has already begun promoting its packages to the island of Ireland.
- Both CMT Stuttgart (January) and ITB Berlin (March) travel fairs were cancelled due to the COVID-19 situation in Germany.
- More than 200 German and Austrian travel agents will attend the DERTOOUR Academy in Killarney in March/ April; events will include a conference, educational trips and networking with island of Ireland tourism industry.

Austria

- Consumer travel fairs were postponed until March due to a huge rise in COVID-19 in Austria recently. From February, Austria will become the first European country to impose mandatory vaccination.

Switzerland

- Swiss holidaymakers continue to travel to sun destinations, with a short lead-in time currently the norm. Return travel requirements in Switzerland were relaxed in mid-January, with tests no longer needed for the vaccinated and recovered. Various travel trade sources report a positive response to this for outbound travel in 2022.

Market activity update

Germany

- The Green Button campaign has been live since the end of September 2021 on programmatic video, display and social channels, and on national and addressable TV during December-January. The campaign will restart in February on digital channels, with TV running to the end of March.
- A Dublin City Break campaign was live during October-January across digital channels.
- The email lead generation campaign ran from September to mid-January; and organic social media postings and consumer newsletter distribution continue regularly.
- Paid search activity, as well as native advertising, has been live in Germany since September.
- A media partnership with walking/cycling app KOMOOT, featuring various walking and cycling tours, was extended until the end of January. The Green Button advertorial partnership with Bunte.de ran in December, while an advertorial on Dublin's *Lonely Planet* accolade appeared in the December edition of the *Lonely Planet* magazine.
- Island of Ireland content appeared in the December issues of two leading golf magazines – *Golf Magazin* and *Golf Time*, with follow-up ads running in the January edition.
- Radio partnerships took place with several popular stations during November/December and featured special island of Ireland content.
- In-market industry and media events will continue throughout 2022, supported by a series of content push and promotional campaigns.

Switzerland and Austria

- Digital campaigns continue, with co-operative activity with partners also playing a key role.

Access update

- **Germany** is expecting 90% of its 2019 access to be available to support recovery this year. Tourism Ireland is working with Aer Lingus, Ryanair, Lufthansa and Eurowings on key co-operative marketing activities. Ryanair has launched a Nürnberg/Dublin service following its exit from Frankfurt.
- **Switzerland** sees Aer Lingus flights resume in February. Swiss Airline's Zurich and Geneva services are running and Zurich/Cork starts in April.
- **Austria:** No change in air access, with Ryanair (5x) and Aer Lingus (4x weekly from 18 February), serving Dublin from Vienna. Ryanair currently flies 1x weekly Dublin from Salzburg.

Market and trade intelligence

France:

- Holiday bookings remain slow for January and February, with only domestic breaks seeing any demand. A vaccine pass is required for interregional travel and international restrictions are still affecting long-haul bookings. Government subsidies for the travel sector remained in place for January. However, research shows that French consumers are eager to travel in 2022, particularly VFR. Booking.com shares that the main factors influencing bookings are travel security, flexibility and fares, as well as an interest in outdoor activities.

Spain:

- Local Spanish trade and industry sources have expressed a positive outlook for 2022. Last minute bookings prevail, however, and the demand for value and flexibility continues.

Italy:

- From January, full vaccination or recovery is mandatory for almost all public activities including public transport. Sentiment research by Demoskopika in December 2021 showed that 16% of Italians cancelled end-of-year holidays due to COVID-19 concerns. Italian airports have reported 2021 losses of around €1.4 billion and financial aid is expected from government. Local trade partners are demonstrating confidence in the island of Ireland as a destination for 2022, with some partners offering similar seat numbers to 2019.

Market activity update

France:

- The Green Button campaign launches on 7 February, with an integrated campaign across traditional TV, Connected TV (CTV), digital outdoor and digital media.
- A full programme of media trips will take place in 2022, including a dedicated Northern Ireland trip in February to cover the opening of the Game Of Thrones Studio Tour. *Le Figaro Magazine* ran a 10-page feature on Dublin in January, while a recent Tourism Ireland media event in Paris celebrated the centenary of *Ulysses*.
- There will be heightened promotional activity in February around the weekend of the Six Nations Rugby in Paris.
- A trade and media event takes place on 10 February to launch 2022 activities; industry partners from across the island of Ireland will attend.
- The Northern Ireland Embrace A Giant Spirit (NI EAGS) campaign will run from the end of February on TV, CTV, social media and programmatic display, promoting direct flights from Paris to Belfast.

Spain:

- Tourism Ireland attended Fitur, the International Tourism Trade Fair, which took place on 19-23 January, meeting with key airlines and tour operators and highlighting the reasons to choose Ireland in 2022. In a sign of growing optimism in the global tourism sector, the fair welcomed 112,000 attendees, including 81,000 professionals from 127 countries.
- A geo-targeted NI EAGS Green Button campaign will run in February and March in the Catalonia region, highlighting direct flights to Northern Ireland from Barcelona, with digital advertising to drive awareness that Northern Ireland is open for visitors, as well as co-operative activities to drive demand for spring.
- Forty key media contacts received lots of great 2022 story hooks – including news of GoT Studio Tour, 110 years of Titanic, 100 years of *Ulysses* and 125 years of Dracula.
- There will be a year-round focus on the centenary of *Ulysses* with a target group of Spanish cultural media outlets planned to visit MoLI in Dublin in early February, to kick-start coverage.

Italy:

- Our extensive media engagement programme continues. The January issue of *Le Freccce* (4M readers) featured a two-page editorial on the icons of the island of Ireland and on sustainability; it was distributed on all high-speed trains in Italy. An online editorial on lonelyplanet.it was published on 23 December and highlighted outdoor activities and experiences throughout the island of Ireland. There was significant broadcast coverage on national TV in December following media visits. Media visits and promotional activities are also under way for Game Of Thrones and *Ulysses* 100.

Access update

- **France:** The Aer Lingus summer schedule re-established much of the important regional access for France and will add 3 x week Perpignan/Dublin route. Irish Ferries' additional ferry on its Dover/Calais route will start in Q1 2022; and Brittany Ferries have reported a surge in bookings for summer 2022.
- **Spain:** Aer Lingus will increase capacity on its Bilbao/Dublin route in spring/summer to 10 flights per week. Madrid/Dublin will run daily and Barcelona/Dublin will run double-daily. Iberia Express will increase to five flights per week in March and daily from mid-June, reducing again to five flights in mid-September.
- **Italy:** Ryanair's summer 22 schedule includes 47 new routes – including Venice/Cork.

Market and trade intelligence

Nordics:

- Forecasts show that Denmark has reached its peak of Omicron COVID-19 infections and case numbers are expected to decrease over the coming weeks. All Nordic markets require a negative COVID-19 test on arrival. Some restrictions around cultural activities were eased in mid-January, with additional easing of restrictions expected in early February.
- A number of market-based trade events were postponed/rescheduled due to restrictions – these include Matka in Finland and TravelMatch in Norway.
- Local trade sources have reported an uplift in consumer confidence in January and an increase in demand for winter travel.
- Travel media in the Nordics remain positive in their outlook for tourism in the coming year and are seeking out press trips and are keen to write travel articles.

The Netherlands:

- Holidays remain important for the Dutch, according to a representative survey by ANWB (Royal Dutch Touring Club). 80% plan to go on holiday at least once in 2022. The enthusiasm is greatest among young people (92%) and lowest among the elderly (72%). When choosing a holiday destination, local restrictions are expected to play a major role this year, as well as the number of infections in the intended holiday destination. The ability to cancel or rebook a trip free of charge remains very important. Car is the most popular means of transport to go on holiday in Europe (64%), followed by air travel (40%).

Belgium and the Netherlands:

- Large tour operators report strong interest in summer holidays for this year but say that consumers are still reluctant to make a final booking until the COVID-19 situation becomes clearer.
- Destinations that offer outdoor, active and nature experiences are reportedly more popular, with less demand for city breaks.
- Tour operators also report that an increase in the cost of car rental on the island of Ireland is expected to impact on its competitiveness as a destination. They also highlight an increase in requests for foreign language courses and school trips for Dublin (vs London) due to Brexit and the changes in passport requirements and quarantine regulations in the UK.

Market activity update

Belgium and the Netherlands :

- The Northern Ireland Embrace a Giant Spirit campaign will launch in mid-February and will include high impact placements and smart audience targeting across connected TV, YouTube, online display, social, digital outdoor, paid partnerships and co-ops with OTAs and airlines. New engaging digital formats will be introduced to increase contextual targeting. The Green Button campaign will go live at the end of March, and will include advertising on Connected TV, YouTube, online display, paid social, outdoor, as well as influencer activity and content partnerships.

Nordics:

- The Green Button campaign will launch in mid-February on digital video, display, native and social media. A dedicated golf campaign was live on social media until mid-January. An industry workshop was rescheduled from 10 February to 20 April and will include 30 industry partners from the island of Ireland.

Northern Europe:

- An extensive publicity programme for Q1 will include influencer trips, as well as St Patrick's Day activity and media events.

Access update

- Routes to Dublin from Nordic markets are at 60% of pre-COVID capacity, with plans to increase to 87% of pre-COVID capacity by July 2022.
- Start-up Icelandic carrier Play has announced flights from Reykjavik to Dublin three times a week from the end of April.
- Danish tour operator Nilles Rejser will have a weekly flight from Aalborg to Belfast from 2 July to 3 September 2022.



Market and trade intelligence

Middle East:

- Ireland and the UK remain on Qatar's red list, which means a mandatory two-day hotel quarantine for vaccinated travellers who return from a visit to either country.
- Feedback from local sources suggests that travellers in the GCC region were wary of booking holidays to the island of Ireland and the UK in January due to COVID-19 related restrictions and high case numbers.

China:

- The Chinese authorities advised against all non-essential outbound travel in early 2022, particularly for the Chinese New Year holiday period at the end of January/early February.
- Despite challenges in early 2022, Chinese travel trade sources have shared that they are confident that outbound travel will gradually resume from China. They expect travel restrictions in China to lift after the 2022 Winter Olympics, at the end of February.

India:

- Local travel trade sources report that they continue to receive enquiries for leisure, meetings and luxury incentive travel to the island of Ireland for summer 2022. Large group enquiries also continue, with reconnaissance and educational trips requested in Q2 for potential trips later in 2022.
- The island of Ireland remains a popular choice for luxury travellers from India with some private charter trips already scheduled for this year.

Market activity update

Global Inbound:

- The British and Ireland Marketplace took place on 28 January 2022, showcasing the best Irish and British tourism products to influential global buyers. The in-person event was followed-up with an online day on 1 February.
- A co-operative partnership is currently taking place with Hotelbeds, in support of the Green Button campaign.
- An educational webinar series with Miki Travel is ongoing and highlights the island of Ireland and its regions to more than 250 travel agents throughout South-East Asia.

Middle East:

- An outdoor brand campaign has been running next to the Ferrari Showrooms on the prestigious Sheikh Zayed Road in Dubai, highlighting the island of Ireland to luxury travellers.
- Tourism Ireland's largest ever Middle East sales mission will take place on 13-17 February. Seventeen island of Ireland industry partners will meet with over 200 GCC travel trade during the targeted sales campaign.

China:

- Tourism Ireland was awarded the 'Most Attractive Overseas Tourist Destination in 2022' by Tuniu.com, one of China's leading OTAs.
- A Chinese New Year digital campaign will run on Weibo and WeChat from 31 January to 5 February.

India:

- A digital campaign with a series of videos filmed in Ireland featuring Indian actor Kubbra Sait is running on multiple channels, including Instagram and Facebook, business websites such as the Economic Times, and popular OTT platforms. The campaign is helping to drive travel to the island of Ireland from India in 2022.
- Several articles highlighting holidays on the island of Ireland have appeared across popular Indian news and magazine print and online titles, including *National Geographic Traveller* and *Exotica* magazine; and our extensive press engagement strategy will continue to target key journalists and titles in 2022.

Access update

- **Middle East:** Emirates, Etihad and Qatar Airways have maintained strong access to Ireland from the Middle East for 2022. In October 2021, Emirates increased access to seven flights per week.
- **China:** China's aviation regulator is expected to maintain curbs on international flights throughout Q1 2022.
- **India:** Access from India has further improved, with Swiss Airlines starting two additional flights to Zurich and Air India starting three additional flights to Germany (Frankfurt, Munich) from Mumbai, Delhi and Bengaluru.

Tourism Ireland at Expo 2020 Dubai

What is Expo 2020 Dubai?

Expo 2020 is a World Expo hosted in Dubai in the United Arab Emirates from 1 October 2021 to 31 March 2022. There are 192 participating nations at Expo 2020 Dubai where the overall theme is *Connecting Minds, Creating the Future*. Ireland's theme – *Putting creativity at the centre of human experience in the 21st century* – is intended to amplify the creating the future thematic strand.

Ireland Pavilion at Expo

Ireland's pavilion draws inspiration from both classical western and Islamic architectural traditions. The primary purpose of the pavilion is to provide an environment in which visitors can engage on a personal level with Ireland's team, music, exhibitions, displays, crafts, innovation, workshops and performances.

For more information on Ireland at Expo 2020 [click here](#)



Tourism Ireland and Expo 2020

Tourism Ireland has a Green Button installation at the Expo Ireland pavilion, where visitors are encouraged to press the Green Button and see a series of inspirational Ireland videos covering: Dublin, Trinity Library and Grounds, golf, Wild Atlantic Way, Cliffs of Moher, Adare Manor, Waterford Crystal, Kilkenny, Portstewart, Giant's Causeway and Belfast.

Riverdance at Expo. For the month of November, Riverdance performed 25 shows on the main Jubilee stage at Expo. It was a full 90-minute show produced especially for the event. Tourism Ireland hosted several events with media and travel trade. The final show was live streamed across all Tourism Ireland's Facebook channels.

An Evening with actress Kubbra Sait was held in November. Kubbra discussed her time in Ireland filming Apple TV's new series, *Foundation*. During the conversation, she launched her six Ireland videos which focused on history and heritage, soft adventure, food and drink, landscapes, culture and luxury. The audience included consumers, media and travel trade. It was also live streamed to reach audiences in India and the GCC.

Expo World Choir was live streamed across all Tourism Ireland's Facebook channels in December and brought together over 65 countries to break a world record for the largest international choir singing 'You Raise Me Up'.

Tourism Ireland/VisitBritain/ VisitScotland hosted a travel trade event at the UK pavilion for over 100 key trade and airlines in November. Tourism Ireland highlighted Northern Ireland itineraries, as well as combined UK and Northern Ireland itineraries.



Press the Green Button



Tourism Ireland's Industry Opportunities

What are Tourism Ireland Industry Opportunities?

As part of our activity to promote the island of Ireland in key overseas markets, Tourism Ireland offers a range of opportunities for industry partners to work alongside us overseas and promote their own business.

Opportunities include low and no cost opportunities, paid opportunities, co-operative partnerships, attendance at overseas events, advertising packages and more. Please register on www.tourismirelandindustryopportunities.com for updates on these and other opportunities.



Offers on Ireland.com

Send us your special offers that tempt potential holidaymakers with unique experiences. We will translate and promote your offer to over 19 million visitors to Ireland.com absolutely free.



Co-operative Marketing

Benefit from co-operative marketing opportunities (like the Industry Market Access Programme below) that support your business getting back to business.



Overseas Events

Take part in our trade and consumer events overseas where you can engage with buyers directly. No-one can sell your business better than you can.



Digital Packages

Avail of our one-stop shop for digital marketing. Many of our markets offer digital packages that enable you to deliver your message across a range of digital platforms.



Social Media

Utilise our Facebook, Twitter and Instagram channels. With over 4 million followers across our social media accounts, we offer you a platform to get creative, market your business and inspire people to visit Ireland.



E-zines

Tell us what is new and exciting about your business and we may include it in one of our regular e-zines to trade and media contacts or to our warm international database of consumer contacts.

What is the IMAP?

The Industry Market Access Programme (IMAP) is a co-operative programme that supports qualified industry to get back to overseas markets as soon as possible and drive recovery for their business via sales and marketing activity. It remains the cornerstone of Tourism Ireland's industry recovery plan for the island of Ireland.



Since the IMAP launched in July 2021, Tourism Ireland has supported over 196 industry partners, approving 182 applications to undertake activities internationally with a total value of €1.35 / £1.17 million.

The IMAP operates on a co-operative partnership basis, with the applicants contributing their time, resources and expertise in addition to a percentage of the costs of the activity, and the funding agencies (i.e. Tourism Ireland and Tourism NI) covering up to 75% of eligible costs.

The next phase of the IMAP will re-open for applications on 15 February and the closing date is 30 April 2022. It is important to note that all applications that meet the qualifying criteria will be approved on a first come, first served basis, subject to overall budget and partners are therefore strongly advised to submit their fully completed applications promptly. A separate programme for Northern Ireland industry will operate once again in collaboration with Tourism NI.

How to get involved



Updated guidelines for Phase III of the IMAP are available for download at www.tourismirelandindustryopportunities.com

Please read all the terms and conditions before completing and returning the updated application forms.

Suitably qualified industry are invited to submit from 15 February onwards.

Previously successful applicants are welcome to apply again.

All queries on the programme should be emailed to IMAP@tourismireland.com

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