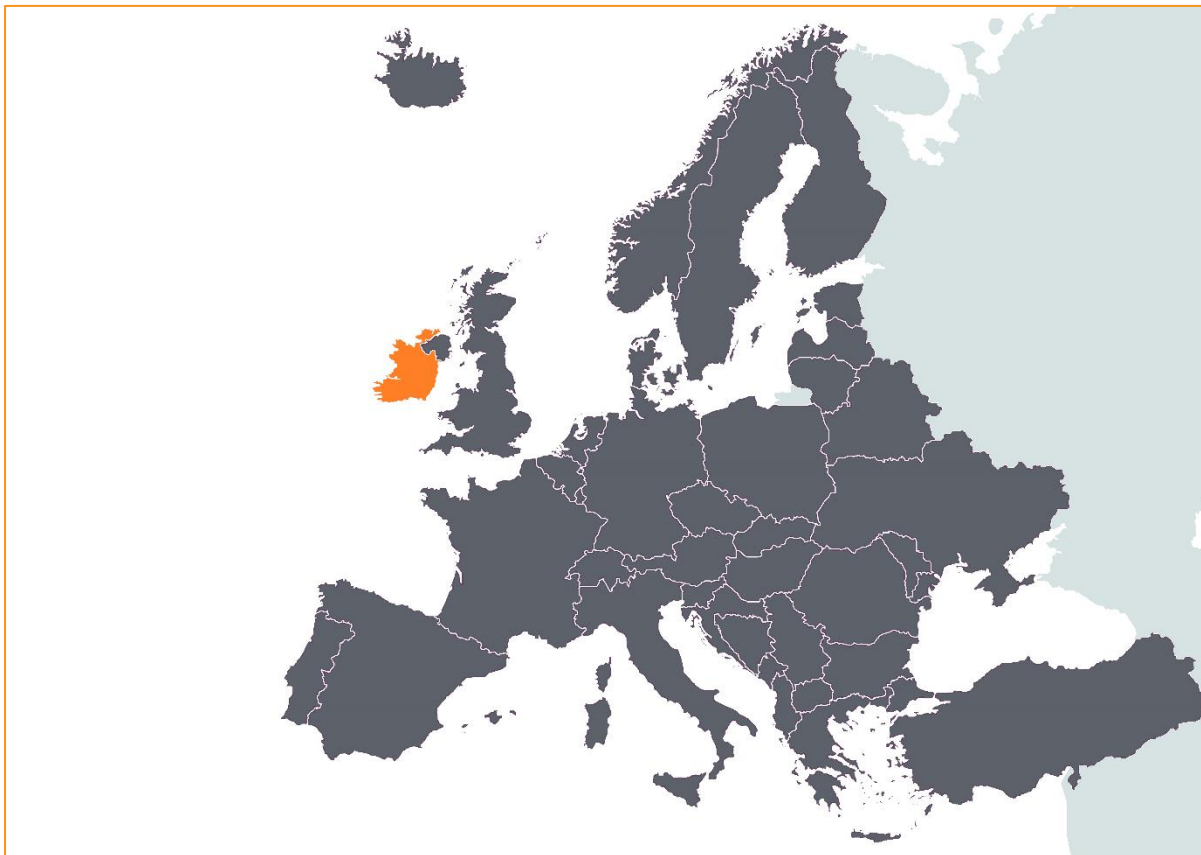




Ireland Market Overview

1. Ireland Economy Overview



- Fastest growing economy in Europe: +6.8% in 2018 (4.1% in 2019 est.)
- Very low unemployment: 5.7% in 2018. (5.1% in 2019 est.)
- Very high GDP per capita – USD \$83,946 (2018)
- Population 4.8 million and growing
- Irish residents took 8.3 million outbound trips in 2018 (+4.2%)
- Irish residents spent \$8 billion on outbound trips in 2018

2. Irish Travel to the US

- Deep historic, cultural & business links between Ireland and the US, especially New England
- Ireland is 17th highest Country of Origin for visitors to the US
- 9% growth in travel to US in 2017 (most recent figures)
- Over 4 million transatlantic seats to US in 2018
- Average stay in the US - 11.5 nights
- Average advance trip decision time - 110 days
- US CBP Pre-Clearance in Dublin & Shannon (only airports in Europe with the facility)
- 21% of Irish travellers will travel between US cities by air during their stay

3. Irish Travel to New England

- Boston Logan is 3rd largest US Point of Entry airport for Irish travellers
- 49 direct flights per week from Ireland to New England during peak season from Dublin, Cork & Shannon
- 3 airlines with direct flights - Aer Lingus, Delta & Norwegian, serving the New England gateways of Boston, MA, Hartford, CT and Providence, RI

4. Top Activities for Irish Visitors to the US

1. Shopping
2. Sightseeing (Beaches, Shorelines, Lakes & Mountains)
3. National Parks/Outdoor Activities
4. Art Galleries/Museums
5. Dining & Culinary
6. Concert/Play/Musical
7. Small Towns
8. Nightclubbing/Dancing
9. Historical Locations
10. Guided Tours

5. Ireland Market Trends

Fly-Drives

- Multicentre fly-drive vacations increasing in popularity
- Driving is seen as a unique way to experience the United States, whereby visitors can get an appreciation of the physical landscape and explore the local culture and 'Americana' along the way.

Activity Tourism

- A recent Irish Travel Agents Association (ITAA) survey shows activity vacations are increasing in popularity
- Particularly prominent for the 19-35 demographic cohort
- Health conscious, keen to do physical activities and looking for unique, off the beaten track 'Instagrammable' experiences

Shopping

- High disposable income due to strong Irish economy
- Availability of quality shopping opportunities a major factor in deciding where to visit for longer vacations.
- Short shopping trips to US increasing in popularity

Culinary Tourism

- A global survey by Booking.com found that food is a major factor in where people vacation
- Irish travellers want to experience high-quality food scenes and sample local cuisine