





Paul Kelly

**Fáilte Ireland
CEO**

IRELAND'S TOURISM INDUSTRY



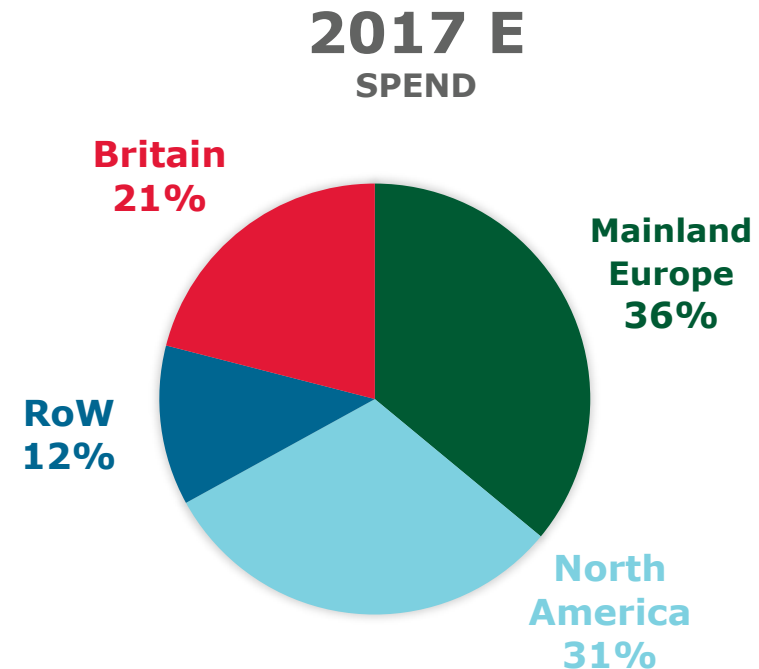
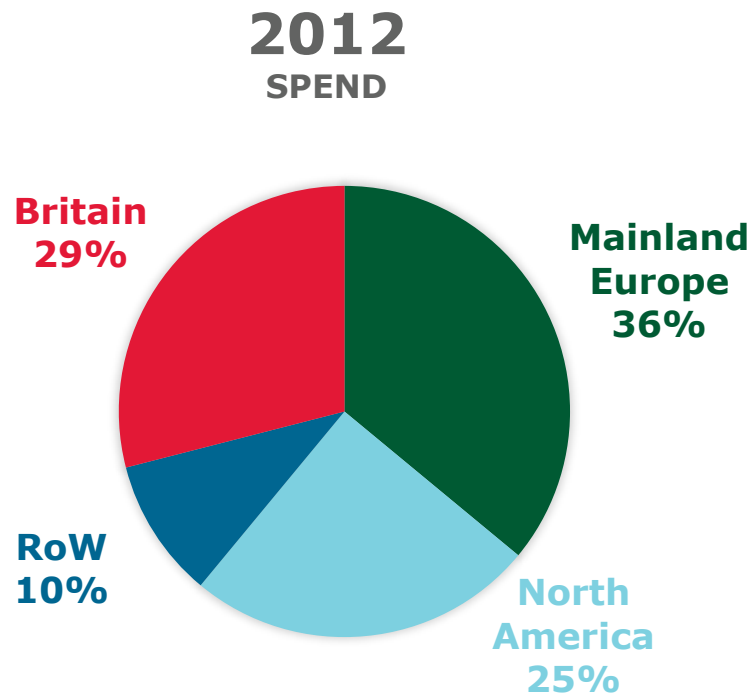
TOURISM IS GROWING

Tourism is one of Ireland's biggest indigenous industries and it is growing

Metric	2017 E vs 2016	Value
Overseas Tourists	+3%	9m
Overseas Spend	+5%	€4.9b
Domestic & NI Spend	+3%	€2.2b
Total Tourism Spend	+4%	€7.1b
Employment	+10,000	235,000 jobs

BUILDING A MORE BALANCED PROFILE OF OVERSEAS VISITORS

Our reliance on the British Market has fallen from 29% to 21% while North America has grown to 31%

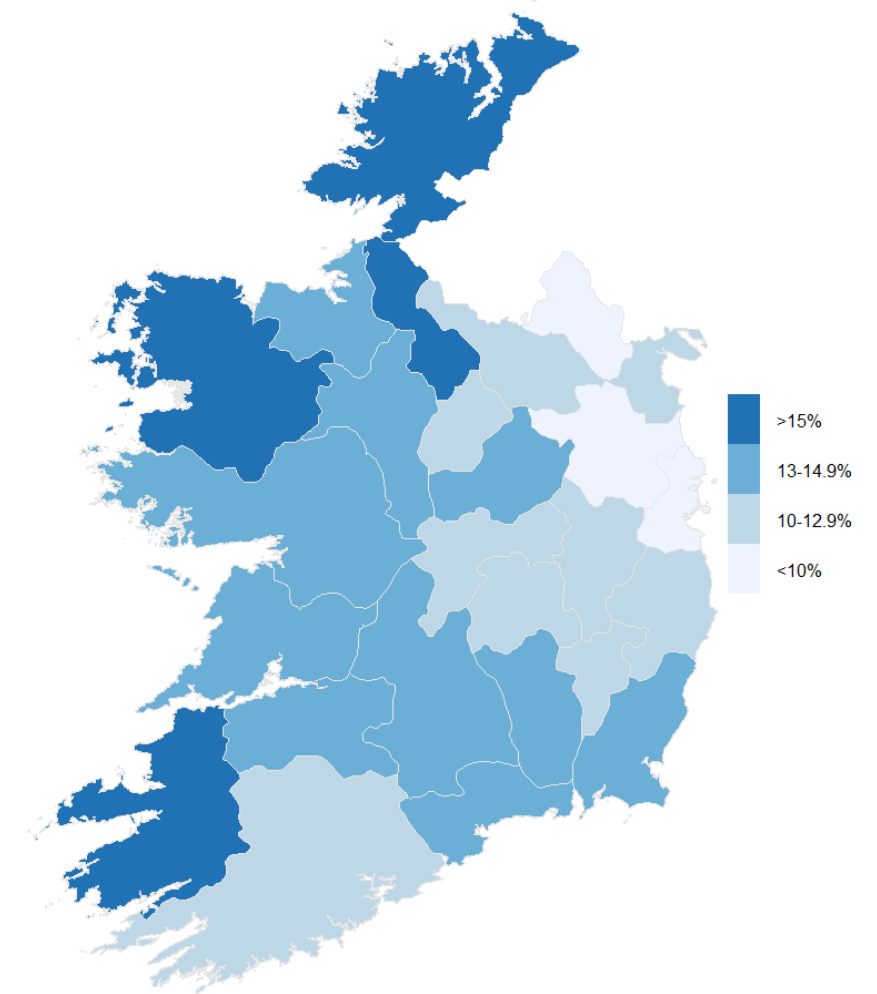


Source: CSO, NISRA & Fáilte Ireland estimates

TOURISM IN REGIONAL COMMUNITIES

- Tourism plays a vital role in supporting regional communities particularly in the west and midwest areas

Source: Central Statistics Office



Share of **BUSINESSES** that operate in tourism



FÁILTE IRELAND'S STRATEGY





Goals

Revenue

Employment

Tax Revenue



REGIONALITY

Tourism is Spreading

<u>Bed Nights</u>	<u>2017</u>	vs 2016
Dublin	10.2m	+9%
Rest of Ireland	16.5m	+11%



SEASONALITY

The Season is Getting Longer

<u>Bed Nights</u>	<u>2017</u>	vs 2016
Summer Peak	11m	+8%
Off Peak	16m	+12%





WILD ATLANTIC WAY
SLÍ AN ATLANTAIGH FHIÁIN




Ireland



**Ireland's Hidden
HEARTLANDS**



**IRELAND'S
ANCIENT EAST**®

MEET IN 
IRELAND





Winning Business
New and Developing Markets

WHY THE NEW AND DEVELOPING MARKETS

- UNWTO Global Trends stellar Growth Worldwide – projected 4-5% growth
- The Scale of the Emerging Markets
- Direct Flight Access China, GCC and Asia
- Lots of New Opportunities for Irish Tourism Businesses





DIRECT ACCESS

- Improving all of the time
- Qatar, Emirates, Cathay Pacific, Hainan
- India ease of access via London / UK
- Visa Free travelling from UAE

CHINA



CHINA

- Population 1.38 billion
- Outbound Travel – over 5mn visitors to Europe
- Constant Growth 21% increase
- Purpose of Travel
 - 80% Leisure & 20% Business
- Average length of stay 7-10 days

Tourism Ireland Estimates



INDIA

- Population 1.35 billion
- Outbound Travel worldwide over 23mn
- Fast Growing Market
- Purpose of Travel
 - 50% Leisure, 20% Business, 10% VFR and other 20%
- Average Length of stay 10 – 15 days

Tourism Ireland Estimates



Gulf States (GCC)

- Population – 54.9m
- Outbound Travel – over 842K visitors to Europe
- Year on Year growth – 7.5% increase
- Purpose of Travel
 - 80% Leisure & 20% Business
- Average length of stay 4-10 days

Tourism Ireland Estimates



EMERGING MARKETS - SEGMENTS

Luxury Segment

- Global Luxury Market growing at 6.4% vs. mainstream at 4.8%
- High Net Worth Travellers growing fastest from Emerging Markets
- Luxury Visitors drive up to 10 times more revenue than average visitor.
- Luxury Travellers seeking transformational and immersive travel.

Millennials – Under 35's

- 2 out of 3 Millennials are coming out of Asia

Fáilte Ireland

Delivers a range of Direct Business Supports to over 3,000 Industry.

1. China Market Ready
2. GCC Market Ready
3. Luxury Market Ready
4. New Guide ***Trading Globally***
Grow Tourism Exports





**Let's get Businesses ready to
welcome these Visitors**