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Emerging Markets, Adventure & Luxury

Inbound Tourism is Big Business for Ireland

Overseas Performance

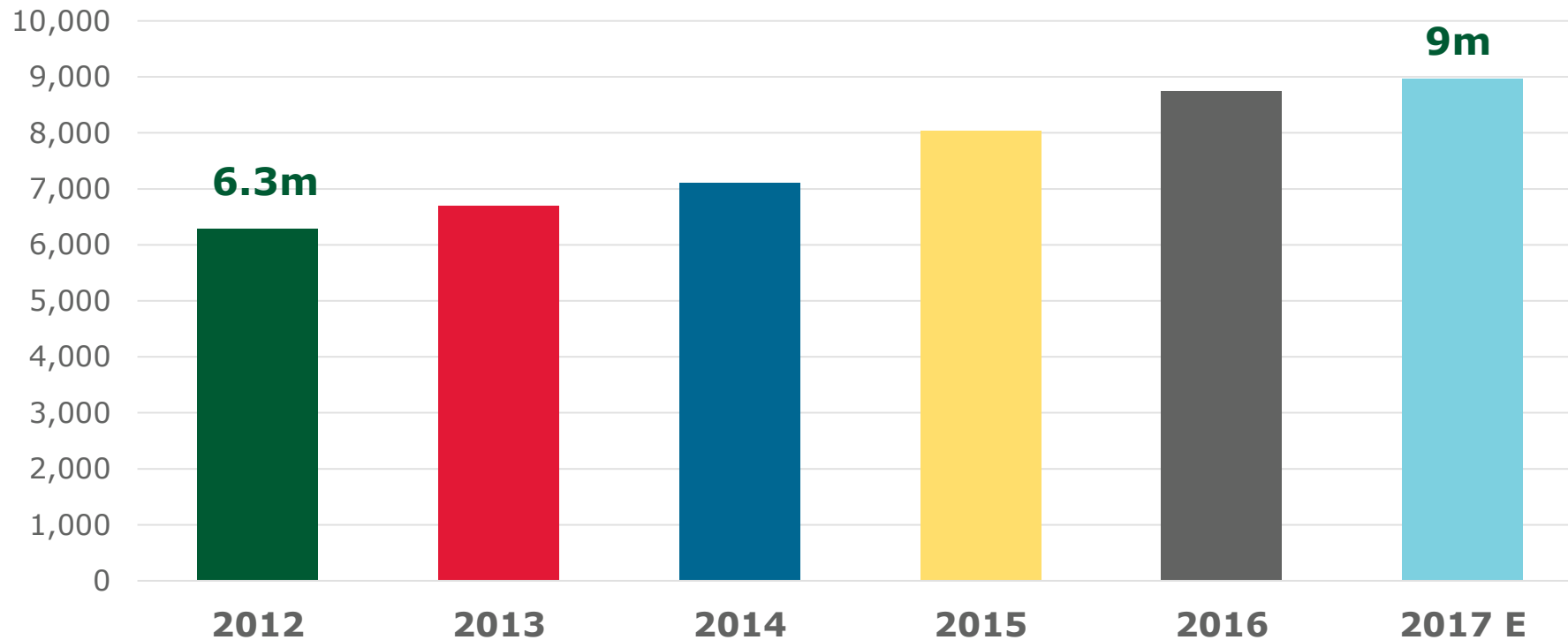
- **9 million**
Overseas visitors
(2017)
- **€5 bn** to Economy
- **235,000 jobs**
(1 in 10 Irish Jobs)

2025 Ambition

- **11.4 million**
Overseas Visitors
- **€ 6.5 Bn**
to Economy
- **306,000 jobs**

HUGE GROWTH IN OVERSEAS TOURISTS

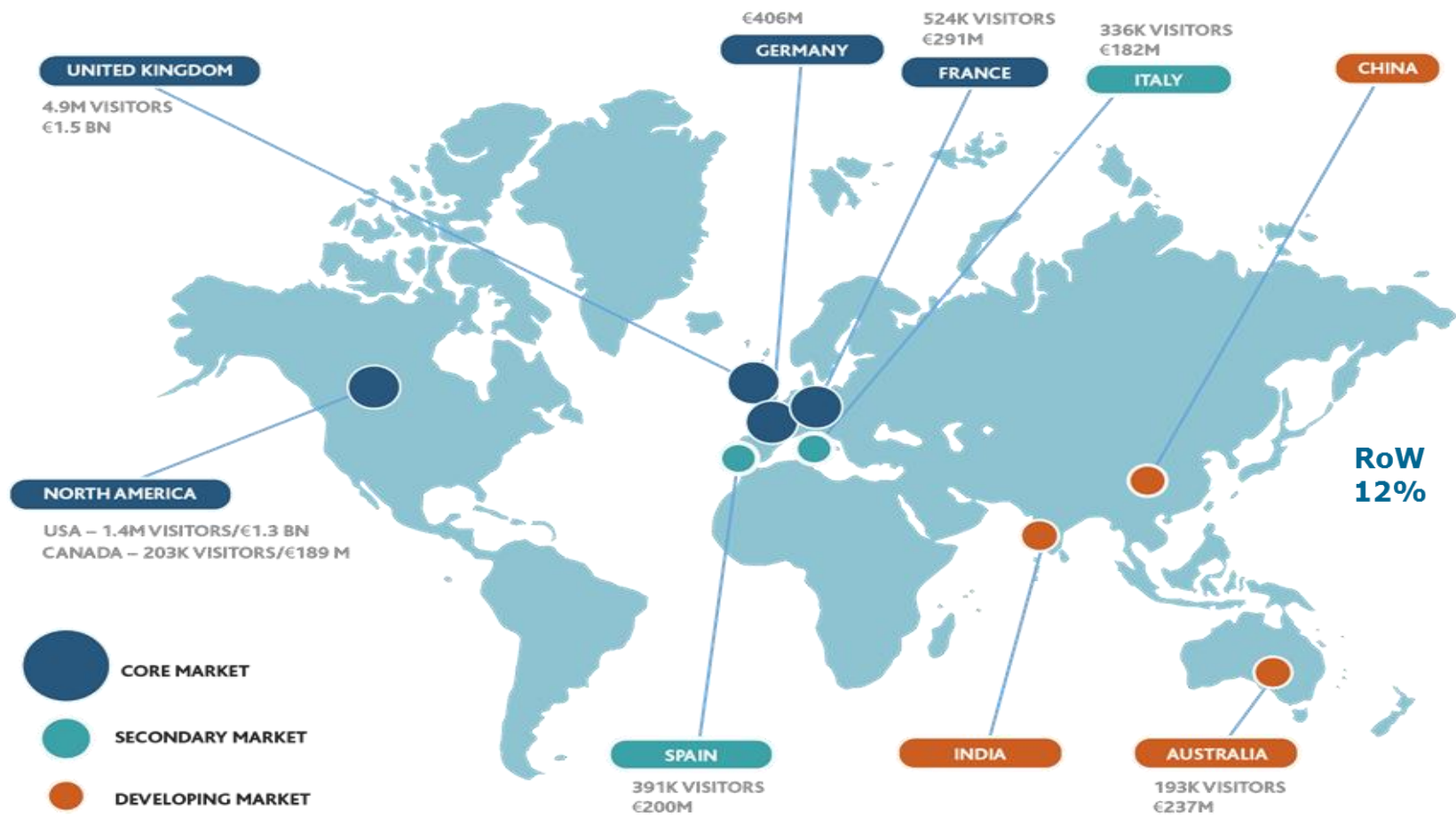
Overseas tourists up 43% since 2012 with an estimated 9m overseas tourists in 2017



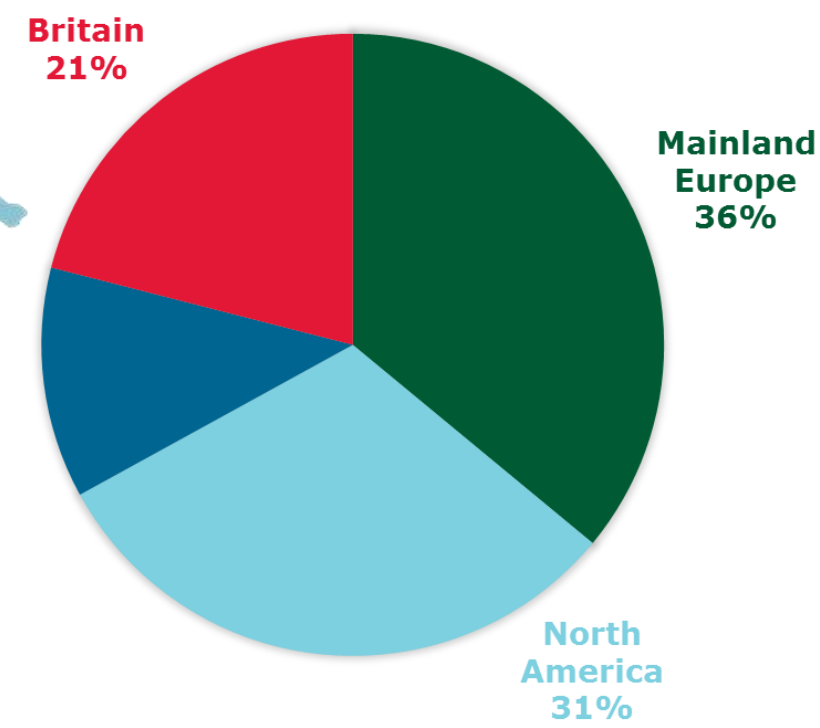
Source: CSO, NISRA & Fáilte Ireland estimates

2017

Ireland's Source Markets



2017 E
SPEND



Market Diversification...



The World of Travel is Changing

UNWTO/SKIFT/Deloitte/PwC

- **Macro economics positive**
- **Consumer & business confidence high**
- **Visa liberalisation**
- **New air routes & connections**
- **40% to Europe - from Europe**
- **40% 2010 to 33% 2025**
- **Emerging Markets Rising**
- **Asia Europe Inbound 26m 2016 - 34m 2025**
- **2030 worlds population will rise by 1b – 97% of this will come from emerging markets**
- **Europe – Aging – Emerging – Younger!**
- **China, India & GCC fastest growing**
- **Tourism, Education, Financial, IT**
- ***Only the beginning....***



Growth in Emerging Markets for Ireland



- **GCC:** Direct access up 60% Etihad, Emirates, Qatar. 28 direct flights per week. *VISA FREE. High spenders. Equestrian. UK #1 destination. Proximity. 40% population expats. Muslim culture. Halal more widely available. Speak English.
- **India:** 7th largest market for Britain. DAA 30% growth since 2015. 10th largest Business Travel Market in the world. BIV/British Visa Scheme. Screen Tourism. Speak English.
- **China:** +8 new direct flights per week. Hainan & Cathay Pacific. +1700 seats per week. Business Travel worth \$291.2b, USA \$290b. Britain & Ireland in top 5 for Chinese visitors. Travel to Europe has +29%YOY. Outbound will double in next 4 years to 250m. 175 weekly flights from China to UK.
- **UK Inbound Operators:** Very important

Know Your Markets



Emerging Niche Markets

LUXURY & ADVENTURE

- Globally luxury travel is expected to be worth \$1,154bn by 2022 – China is expected to grow at the fastest rate
- The number of HNW (\$1-3m) & UHNW (+\$5m) growing rapidly globally – China fastest growing!
- Rapidly growing HNW Millennial 18-35*
- Adventure and nature very important
- 21st June Luxury Insights Sharing
- Tourism Ireland/Failte Ireland Strategy



Support Market Development & Growth in Overseas Markets



COMMERCIAL DEVELOPMENT

- TI/FI Partnership - **JOG**
- Increase Sales Opportunities
- Identify New & Core Market Opportunities
- Provide Markets with regular product updates
- Expand Programming – Itineraries
- *Business Development Fund – FAM's/Itineraries/Market Development
- Sales Supports Irish Industry
- Recruit Sales Missions, Sales Platforms
- *Saleable Experiences!*

Saleable Experiences!!

- Hosted 1,337 Overseas Buyers & 1,400 Media Fam's
- 420 Buyers In- Ireland workshops
- 311 recruited Irish Industry to attend 26 overseas sales platforms eg China Sales Mission

www.tradeportal.failteireland.ie



Itineraries Development



Ireland

**7 DAY / 7 NIGHT
IRELAND ITINERARY
(SOUTH OF ISLAND GEOGRAPHY)**

Ireland

**7天/7晚爱尔兰
(推荐行程)
(SUGGESTED ITINERARY)**

包括贝尔法斯特
(BELFAST) 和北爱尔兰
(NORTHERN IRELAND)

WILD ATLANTIC WAY
WILDLANDS FOUNDATION

IRELAND'S ANCIENT EAST
ANALANN ANTIAR

Dublin

WILD ATLANTIC WAY
WILDLANDS FOUNDATION

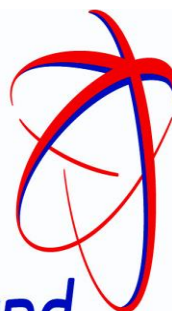
IRELAND'S ANCIENT EAST
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Dublin



Distribution Channels

DMC's?
Tour Operators?
Direct/Indirect?
Channel Manager?
On/Offline?
Fam's?
Sales Mission?
Business Tourism?



UKinbound®



Baidu 百度

Ctrip 携程



Ireland

Meet in
Ireland
Connect with Excellence

Ireland's Tourism Industry

- Trade Differently – Silk Roads
- Travel Differently – UK/Ireland
- Use Different Channels
- Culture is different – understand it
- How to do business?



 **Fáilte Ireland**
National Tourism Development Authority

Trading Globally Winning Business from the Emerging Markets



Market Snapshots – Help you do business

China Market Snapshot

Tourism Development Opportunities

Visitor Volume to Ireland

Year	Volume
2014	17,000 – 40,000
2015	40,000 – 50,000
2016	50,000 – 60,000
2017 (Forecast)	60,000 – 70,000
2018 (Projected)	70,000 – 80,000

China Market Profile

Total Market Population
1.415 Bn
equivalent to 14.15% share of world population

Average Wage
74,318 CNY
equivalent to circa €12,000 p.a. (2016 est.)

Major City & Population Profiles

City	Population	GDP	Comment
Beijing	21.71 million	\$6,120 Bn (2014)	World's largest city
Shanghai	24.15 million	\$2,000 Bn (2014)	World's largest city
Chengdu	16.1 million	\$1,700 Bn (2014)	World's largest city
Guangzhou	13.5 million	\$1,000 Bn (2014)	World's largest city
Shenzhen	12.5 million	\$1,000 Bn (2014)	World's largest city
Chongqing	10.7 million	\$1,000 Bn (2014)	World's largest city
Tianjin	15.5 million	\$1,000 Bn (2014)	World's largest city
Hangzhou	10.5 million	\$1,000 Bn (2014)	World's largest city
Wang Jiao	10.5 million	\$1,000 Bn (2014)	World's largest city

Source: China Statistical Yearbook 2015

Irish Business with China

Chinese Business Investment into Ireland

- Ireland – 5th largest market in Europe for Chinese Investment
- Direct investment reached 2.5Bn in 2016
- Popular investment areas include: Transport, Energy, ICT, Entertainment, Financial Services & Property

Irish Business with China

Increased by 35% in 2017 alone

Exports include food products from beef to pork, gifts in vehicles, baby food for children as well as clothing and medical devices emerging from medical research, in farming with, food products in medical food.

Domestic & foreign goods as well as software and services leading services have resulted in Irish exports reaching over 2.5Bn in 2016.

Languages Spoken

Standard Chinese, commonly known as Mandarin (which has four tones), is the official language of China. They write using simplified Chinese characters.

In Southern China and Hong Kong they speak a Cantonese Dialect (which has six tones and nine tones), and write in traditional Chinese, although most will also have a certain command of Mandarin.

There are some 20 dialects in China, but all use simplified Chinese characters in written communications.

GCC Market Snapshot

Stages/Influences in the Travel Journey for GCC market - inspiration, planning, booking, etc.

Word of mouth recommendations, social media influencers and recommendations from traditional travel agents remain popular among GCC travellers.

Why GCC visitors choose Ireland?

Ireland is visa free for UAE nationals, mild climate, Ireland's proximity to the UK, cheap food, luxury accommodation and casinos, shopping, scenic landscape and links to Arabic culture.

Driving tourism business with GCC market

- Things to consider
- Halal tourism is growing. Ireland is home to a vibrant and growing Muslim community. Over 60,000 Muslims call it home, and there is wide availability of Mosques and Prayer rooms across the island of Ireland, which are easily accessible and welcoming to Muslim visitors. Restaurants must offer halal friendly food options. Accommodation providers must cater to the needs of Muslim tourists, providing copies of the Quran, Prayer mats and the direction for Qibla, offering large adjoining rooms such as family suites and alcohol-free hotel rooms.

India Market Snapshot

Irish Business with India

- 90 Indian Companies have made Ireland their home.
- Six out of top ten IT companies are Indian that includes TCS/Tech Mahindra/HCL/Infosys and Wipro.
- Many Pharma companies also have made their mark in Ireland that include Unichem/Biochem/Vision care SMPT Crompton Greif/Red Seal/Deepak Textiles.

India Business investment into Ireland

Booking lead times?

2-3 months in general however post the British Irish Visa Scheme many travellers especially the VFR take up holidays in Dublin and Belfast during the week while visiting their relatives or children in London.

Visitor mix?

Group Tours, Free Individual Travellers, Families, DINKS, Honeymooners, Visiting Friends and Relatives, MICE.

Promotional & marketing opportunities

India Sales Mission, Joint promotional activities with leading travel trade and airlines, Ireland Specials Programme.

Popular search engines: Google, MSN, Yahoo

Popular social media platforms: Facebook, Twitter, Instagram, Snap chat, LinkedIn

Marketing/communications - core messages in presenting Ireland to India

- Ireland as a family destination
- Gastronomy
- Shopping
- Value for money
- Nightlife
- Natural Beauty

FÁILTE IRELAND 'GET MARKET READY' PROGRAMMES



Target Right Market & Segments for your business



We look
forward to working
with you!



Thank You