Tourism Ireland

GCC MARKET SNAPSHOT

GCC MARKET PROFILE | 2014

GCC MARKET OVERVIEW

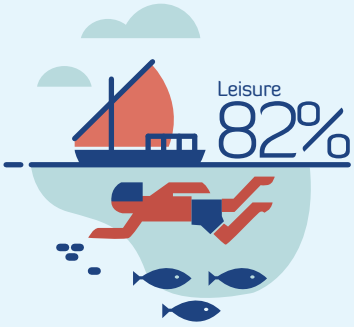
COUNTRY	POPULATION	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
United Arab Emirates	5.5 million	4%	Dubai, Abu Dhabi	Arabic, English	AED
Kingdom of Saudi Arabia	27 million	8%	Riyadh, Jeddah, Mecca, Medina, Ad Dammam	Arabic	SAR
Bahrain	1 million	4%	Manama, Al Muharraq	Arabic, English, Farsi, Urdu	BHD
Kuwait	2.5 million	3%	Kuwait city	Arabic, English	KWD
Qatar	2 million	8%	Doha	Arabic, English	QAR
Oman	3 million	5%	Muscat	Arabic, English, Baluchi, Urdu, Indian dialects	OMR

GCC OUTBOUND TRAVEL

YEAR	2010	2011	2012
NUMBERS	13,500,000	17,000,000	18,000,000
YEAR ON YEAR GROWTH %	1%	25%	8%
VISITOR NUMBERS TO EUROPE	460,000	480,000	—
YEAR ON YEAR GROWTH %	2%	4%	—

Purpose of Travel (% share of visits)

PURPOSE



Top 5 Destinations to Visit

WORLD WIDE

1. Jordan
2. Egypt
3. Thailand
4. USA
5. Lebanon

EUROPE

1. United Kingdom
2. Germany
3. Italy
4. France
5. Spain

Peak Travel Periods

MONTH	AVERAGE LENGTH OF HOLIDAY
July and August	21 to 42 days
Eid Al Adha Holidays	4 to 10 days

Travel patterns are affected by the timing of Ramadan each year, a holy festival when Arabs do not typically travel abroad. In recent years Ramadan has fallen during the summer months, which has affected outbound travel statistics during this period.

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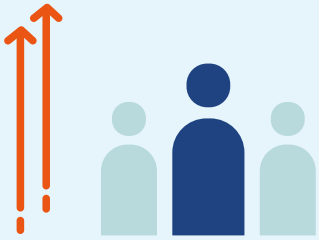

OUTBOUND TRAVEL TO IRELAND

Tourism Ireland best estimates

MARKET	2009	2010	2011	2012	2011 V'S 2012 % VARIANCE
Middle East	31,000	35,000	41,000	42,000	3%

TOURISM IRELAND'S TARGET MARKETS / SEGMENTS

NAME	AGE	PROFILE	% OF TOTAL POPULATION	HOW DO THEY BOOK THEIR HOLIDAY?	ACCOMMODATION TYPE WHILE ON HOLIDAYS	HOW DO THEY LIKE TO TRAVEL WITHIN IRELAND?	KEY REQUIREMENTS FROM IRISH INDUSTRY FOR THIS SEGMENT
GCC Nationals	25+	UAE and KSA nationals, couples and families. High spending tourists with a preference for luxury travel.	40%	Strong reliance on traditional travel agents	5 star luxury properties	Self-drive Chauffeur service	- Provision of halal food - Privacy is important - Strong emphasis on family activities - Large family & adjoining rooms required - Alcohol should not be promoted - Culture & heritage
Western expats	30+	Western expats residing in UAE and KSA, English speaking couples and families who already have a cultural awareness of Ireland.	12%	Increasingly moving towards online booking however, local travel agent influence is still important	3-5 star properties	Self-drive Coach tours	- Link up with wider tourism festivals - Strong emphasis on family activities - Good value for money - Touring routes

WEEKLY FLIGHTS & SEATS FROM KEY CITIES IN GCC TO IRELAND

DEPARTURE CITY	NO. OF FLIGHTS PER WEEK	NO. OF SEATS	DIRECT AIRLINES
Abu Dhabi	10	3,484	Etihad Airways
Dubai	7	2,520	Emirates

VISA REQUIREMENTS

TO REPUBLIC OF IRELAND

Irish Visa required for GCC Nationals

TO NORTHERN IRELAND

UK Visa required for GCC Nationals

VISA WAIVER APPLICABLE

Yes

IRELAND'S STRENGTHS AND OPPORTUNITIES FOR TARGET MARKET

IRELAND'S STRENGTHS

1. Visa Waiver Programme
2. 17 direct flights per week to Ireland
3. Ireland's pleasant climate
4. Strong awareness of Ireland among Western expats
5. Strong Irish presence and influential Irish expats with pivotal positions in the UAE

IRELAND'S OPPORTUNITIES

1. St Patrick's month
2. Launch of new Tourism Ireland website
3. Launch of new Ireland Specialists
4. Ireland's proximity to UK – GCC nationals visiting London during the summer months
5. Growing importance of social media in UAE

TOP 5 ATTRACTIONS

1. Horseracing/Breeding: Irish National Stud, Galway Races
2. Nature & Scenery: Giant's Causeway, Cliffs of Moher, Wild Atlantic Way
3. Culture & Heritage: Blarney Castle, Kilkenny Castle, Ballyfin Estate, Ashford Castle
4. City lifestyle: Afternoon tea, Titanic Belfast, Halfpenny Bridge, Luxury shopping, spa retreats
5. Festivals: St Patrick's Day, Halloween, Traditional Music

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TRAVEL TRADE MARKET

TRAVEL TRADE	OVERVIEW	% OF TOURISM IRELAND'S TARGET MARKETS BOOKING THROUGH THIS PROVIDER
Tour Operators / Wholesalers	10 major tour operators in the GCC	30%
Travel Agents	Traditional travel agencies are key to the GCC's travel planning process, with over 6,000 agencies across the region.	40%
MICE	A small but growing sector	5%
Online Travel Agents	Very few online travel agents in the market. Local travel agents are increasingly investing in online booking technology	5%
Online direct with airlines & hotels	Popular with Western expats	20%

TOP 10 TRAVEL TRADE

TRAVEL TRADE	CURRENTLY PROGRAMME IRELAND
1. Emirates Holidays	Ireland FIT tours and tailor-made packages
2. Etihad Holidays	Ireland FIT tours
3. dnata	Ireland FIT tours
4. Kanoo Travel	No Ireland tours, available upon request
5. Al Rais Travel	Ireland FIT tours
6. Al Tayer Travel	Ireland FIT tours
7. Al Rostamani	Ireland FIT tours
8. Abu Dhabi Travel Bureau	Ireland FIT tours
9. Al Futtaim Travel	No Ireland tours, available upon request
10. ITL World Travel & Tourism	No Ireland tours, available upon request

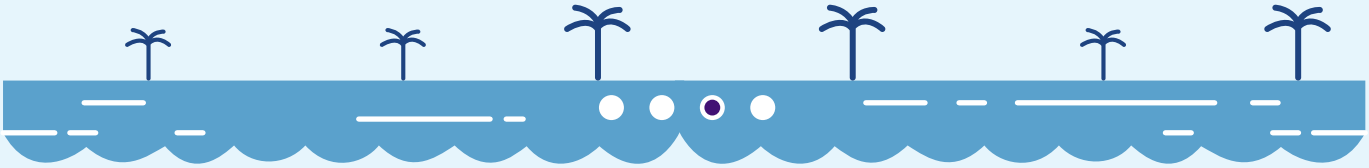
MEDIA LANDSCAPE

TOP 5 MEDIA CHANNELS FOR CONSUMERS

1. Friday Magazine – The National Newspaper
2. Timeout Dubai
3. Ultratravel
4. dnata World Travel
5. Lonely Planet Middle East

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE

1. Arabian Travel News
2. Travel Trade Gazette
3. Travel Trade News Middle East
4. Travel Trends International
5. Business Traveller Middle East



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TOURISM IRELAND COUNTRY CLUB PROGRAMME

Tourism Ireland's Country Club Programme for the GCC was designed to provide you with a platform to easily explore, make contacts and develop business from the new and developing markets which have the greatest long term growth potential for inbound tourism to Ireland.

The GCC market holds a sales mission every 2 years.
The next Sales Mission is planned for 2015.

THE EXPLORER €450 / £387

A reduced Country Club membership as there is no Sales Mission in 2014.

- Priority on Failte Ireland and Northern Ireland Tourist Board itineraries for media and trade fam trips
- Workshops with visiting travel trade to Ireland
- Cultural awareness training
- A link on www.ireland.com/en-ar
- Inclusion in ezines, press releases and social media
- Quarterly intelligence reports – exclusive to Country Club Members

Your Commitment to the GCC

- A commitment from you to work with the GCC for at least three years to build contacts, relationships and clients.
- Offer Failte Ireland and Northern Ireland Tourist Board preferable rates for media visits and trade familiarisation trips.
- Adaption of your product or service as necessary to service the markets needs

For more information or to join Tourism Ireland's Country Club Programme for GCC, China or India please visit:

tourismirelandindustryopportunities.com

CONTACT INFORMATION

Middle East

Tourism Ireland

PO Box 502099 Office 501, Al Thuraya Tower 1 Dubai Media City Dubai, UAE

T: +971 436 25129

F: + 971 436 25358

E: tourismireland@fourcommunications.com

W: www.ireland.com/en-ar

www.discoverireland.me