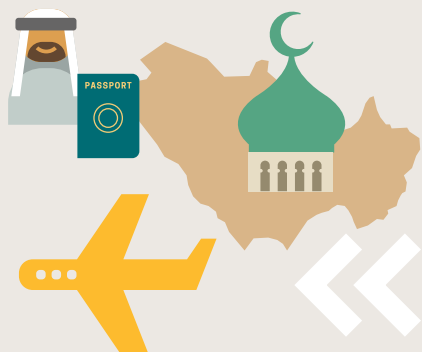




MIDDLE EAST MARKET PROFILE 2019

GULF COUNTRIES MARKET OVERVIEW

					
Country	Population	GDP Growth Change in 2018 (%)	Capital Cities	Language(s)	Currency
United Arab Emirates	9.5 Million	+4%	Abu Dhabi	Arabic, English	AED
Kingdom of Saudi Arabia	33.6 Million	+3%	Riyadh	Arabic	SAR
Bahrain	1.5 Million	+3%	Manama	Arabic, English, Farsi, Urdu	BHD
Kuwait	4.2 Million	+11%	Kuwait city	Arabic, English	KWD
Qatar	2.7 Million	+10%	Doha	Arabic, English	QAR
Oman	4.8 Million	0%	Muscat	Arabic, English, Baluchi, Urdu, Indian dialects	OMR



MIDDLE EAST OUTBOUND TRAVEL

Year	Worldwide Arrivals	Arrivals to Europe
2018	50.4 Million	15.6 Million
2017	48.7 Million	14.4 Million
2016	46.9 Million	11.5 Million
2015	48.4 Million	11.7 Million
2014	44.2 Million	10.7 Million

OUTBOUND TRAVEL TO THE ISLAND OF IRELAND

Year	Number
2017	71,000
2016	71,000
2015	60,000 - 70,000
2014	50,000 - 60,000
2013	45,000 - 55,000



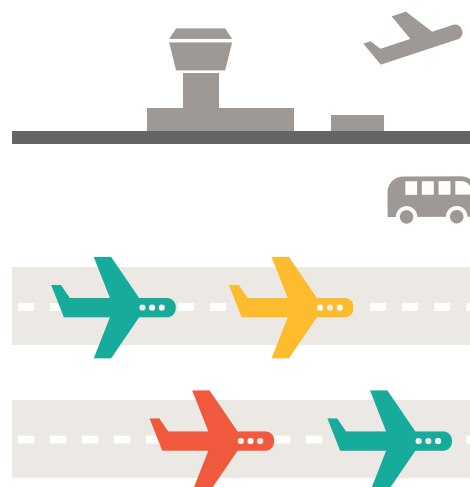
TOP 5 DESTINATIONS VISITED

World Wide	Europe
1. Saudi Arabia	1. United Kingdom
2. Lebanon	2. Germany
3. Oman	3. Switzerland
4. UK	4. Italy
5. Germany	5. Austria



WEEKLY DIRECT FLIGHTS TO THE ISLAND OF IRELAND

Departure City	No. of Flights Per Week	No. of Seats	Direct Airlines
Abu Dhabi, UAE	7	2,884	Etihad Airways
Dubai, UAE	14	4,956	Emirates Airlines
Doha, Qatar	11	2,794	Qatar Airways

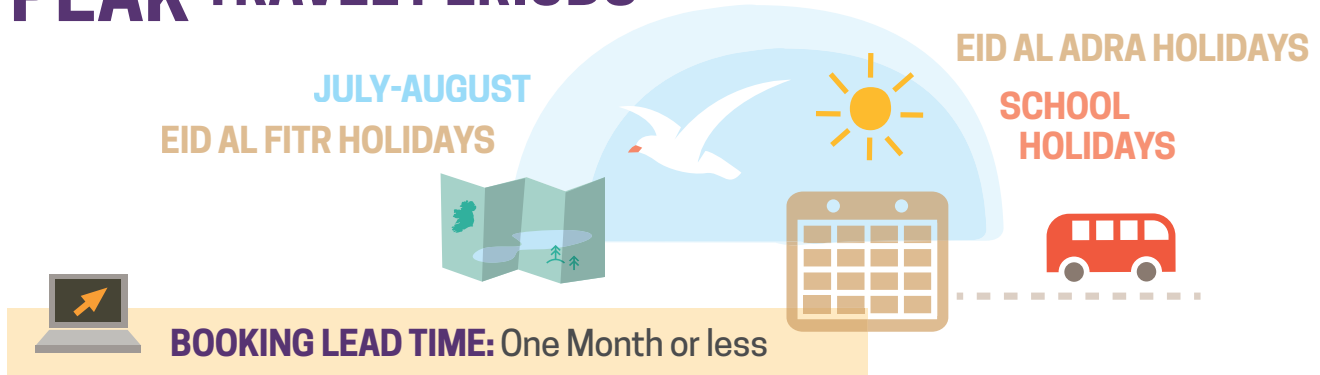


PURPOSE OF TRAVEL

(% SHARE OF VISITS)



PEAK TRAVEL PERIODS



TOURISM IRELAND'S TARGET MARKETS

	Name	Age	Profile	% of total population	How do they book their holiday?	Accommodation type while on holiday	Travelling Requirements
	GCC Nationals	25+	- Families - Couples	20%	Strong reliance on traditional travel agents	5 star luxury properties - High spender with a preference for luxury travel	- Self-drive - Chauffeur service
	Western Expat	30+	English speaking with a cultural awareness of Ireland.	40%	Online booking	3-5 star properties	- Self-drive - Coach tours

TOP ACTIVITIES

CASTLES AND GRAND HOUSES

PARKS AND GARDENS

SHOPPING HORSE RACING

DINING

THE ISLAND OF IRELAND'S STRENGTHS

IRISH VISA WAIVER PROGRAMME

32 DIRECT FLIGHTS TO IRELAND

TEMPERATE CLIMATE

EXCELLENT DINING OPTIONS

CLOSE PROXIMITY TO THE UK



TRAVEL TRADE

Travel Trade	Ireland's target market booking through this channel (%)
Travel Agents	40%
Tour Operators / Wholesalers	30%
Online direct with airlines & hotels	20%
Online Travel Agents	5%
MICE	5%



TOP 10 TRAVEL TRADE



1. Al Naboodah Travel
2. Dnata Travel
3. Al Rais Travel
4. Al Rostamani Travel
5. Cox & Kings
6. Etihad Holidays
7. Emirates Holidays
8. Cozmo Travel
9. Trans Arabian Travel
10. Omeir Travel

KEY NOTES

PROVISION OF HALAL FOOD

STRONG EMPHASIS

ON FAMILY ACTIVITIES

LARGE FAMILY AND ADJOINING

ROOMS ARE REQUIRED

LUXURY TRAVEL IS A PREFERENCE



For more information visit:
www.tourismireland.com