

Age is but a number

Passengers are a little older, groups are getting smaller



AGE IS BUT A NUMBER

50-64 year olds are the age group growing fastest over the last 5 years

+15% vol

Reject the 'silver traveller' label - heading for a 'golden gap year' with sense of adventure. In general, have more disposable income and less 'ties' so opportunity for commercial products.

They now account for 1 in 4 passengers travelling through Dublin Airport. Mainly driven by European residents +20% in volume YoY.

40%
come for a holiday

1 in 5
travel for business
higher than the DAP avg.

Like the DAP overall profile, skilled workers continue to increase in this group - growth driven by North Americans.



+24% (vol increase) North American skilled workers aged 50-64 years.

+29% vol
in couples aged 50-64 yrs



THREE'S A CROWD

Solo travel continues to dominate (55% of pax) and couples are growing.

1 in 5
travel as a couple

+21% vol
YoY in couples (friends or romantic)

Solo pax purchase F&B from coffee shops and convenience stores, couples more likely to sit down in restaurant.

3 in 5
couples will sit-in to eat
Higher than the DAP average of **49%**

As group size is smaller, we need to make sure facilities/food & beverage outlets meet needs, e.g. with seating arrangements, so that we maximize our 'user friendliness'.



TIE FOR TOP SPOT

Traditionally VFR (visiting friends and relatives) would have been the most common reason to travel. Since 2011 VFR has declined and holiday has grown. However, if consumer sentiment continues to decline - need for 'getting away' will still remain, and may revert to VFR - returning it to the top spot.

VFR and Holidays now account for

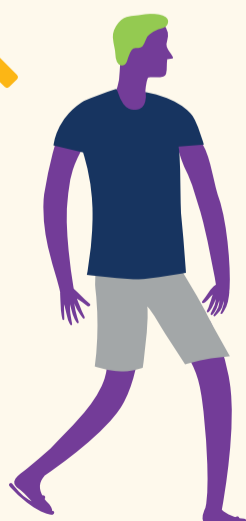
1 in 4
Passengers each

42%
of holiday makers are now going for two weeks

1 in 3
go for shorter breaks (4-7 nights)

More skilled workers
+26% vol
and couples
+12% vol
going on holidays.

Holiday pax more likely to purchase in retail and F&B.



Top destinations include Amsterdam, Faro, Malaga, Lanzarote, Paris, Barcelona and Rome.



BREXIT - THE MILLION DOLLAR QUESTION

Uncertain times - are we seeing an impact on our pax?

So far this year passenger numbers travelling to GB have remained relatively stable, but this is mainly due to Irish residents travelling for leisure.

GB residents travelling for leisure **-35% vol** Q3 2018 v. Q3 2017

GB residents travelling for business **-4% vol** Q3 2018 v. Q3 2017

85%
of Irish consumers are concerned about Brexit

CONSUMER SENTIMENT IN IRELAND HAS TAKEN A FALL

Brexit has had a negative impact on consumer sentiment (in ROI, GB and NI). In NI 1 in 3 attribute drop in sentiment to Brexit. **Expectation of less disposable income in the future.**

In ROI there has been a sharp drop in expected spend for holidays since 2018. This could impact on DAP further down the line into next year. Things are changing day by day, we have our eyes peeled on what might happen next and the affect on our pax.

