

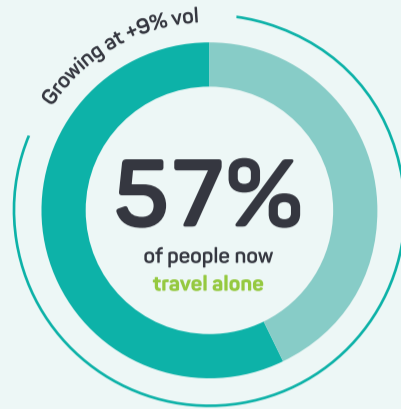
Me, Myself & I

The Solo Traveller Dominates

#10



THE SOLO PASSENGER



Evident across all social classes,
it is faster than passenger growth! (+6% vol)

The majority of business passengers and people who are visiting friends & relatives tend to **travel alone**.

The increase in **travelling alone** is driven by young females going on additional holidays, **increasingly shorter trips** less than 3 nights.

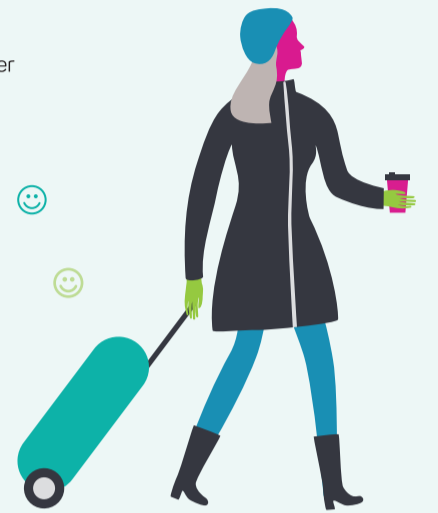
Impacts on DAP:

- More likely to avail of **grab & go** offer
- Specific requirements are needed at F&B facilities to cater for people **travelling alone**.

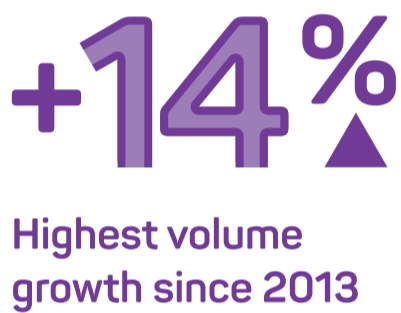


+1.6m times #solotravel

appeared on Instagram from November 2016 – 2017.



ADDITIONAL HOLIDAYS



Driven mainly by Irish females.

Growth in skilled/semi-skilled workers travelling **23% to 31%**.
Increased 50–64s, travelling to Europe.



Currently **1 in 3** people are **travelling alone** on additional holidays.

Impacts on DAP:

We need to cater for the increasing trend towards hyper-personalisation **'Me Me World'**, particularly in terms of F&B offers and bespoke products and services where customers expect to feel they are special and being looked after.



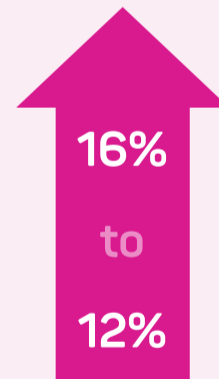
BUSINESS TRAVEL GROWTH



Skilled/semi-skilled workers **doubled in share** in business travel.

Brexit uncertainties will impact UK residents travel in either business or leisure.

+18% vol UK Business
-4% vol UK Leisure



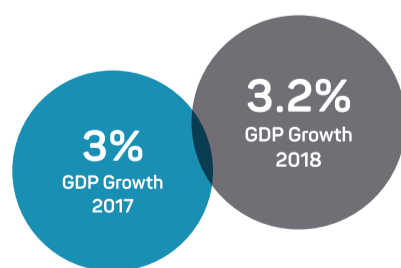
North American transfer business travel increased.



Emerging economies in Asia and Africa will see **the greatest business travel increase** over the next decade. (WTTC, 2017)



BACK TO PRE-RECESSION LEVEL



Global economic growth continues to strengthen. Ireland had the second highest GDP per capita in the EU 2016 (IATA 2018).

Unemployment rate in Europe is dropping. Unemployment rate in Ireland dropped from 7.4% to 6.1% (Jan 17 v Jan 18, CSO).

Tradespeople are travelling more

+31%

Largest volume growth in 2017 (vol YoY)

+18.4% (vol YoY)
Number of construction projects (CSO 2017)



Skilled/semi-skilled workers are **taking more holidays** **19% to 22%**

This is driven by Irish people travelling to European destinations such as Amsterdam and Malaga.

They are travelling **more and more frequently** **2.9 to 3.3** is the average number of trips via DAP.