

The Rise of the Skilled Worker



SKILLED WORKERS

Skilled workers like nurses, carpenters, hairdressers, tilers continue to grow

+40%
vol

Now 27% of passenger share.

Reflecting DAP profile, increase in couples and more additional holidays:
23% to 27% (+68% vol)
Additional Holidays

Skilled workers in particular travelling for slightly longer (1 – 2 weeks) is growing from
10% to 15%

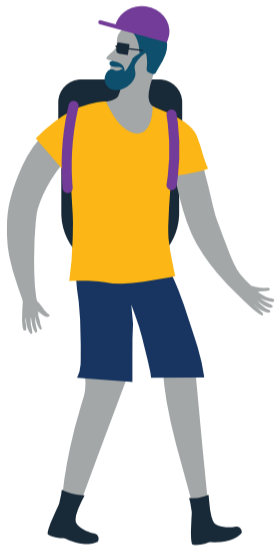
Most popular region is Europe, but growth in Transatlantic region.

Impacts on DAP:

- With rise of the **skilled workers**, there is a need to broaden the mix of commercial offerings to appeal to this group.
- **Skilled workers** are more price-sensitive and reactive to changes around price!
- Rise in **skilled workers** reflecting a decrease in unemployment in Ireland, especially among skilled manual labour (CSO).
- However, consumer sentiment is fragile - there is an increase in saving and decrease in job security (KBC/ESRI).
- If these trends continue, DAP could see skilled workers cut back on perceived 'extras' like F&B and retail.



ADDITIONAL HOLIDAYS



+15%
vol

Continued vol growth

Now 23% of passengers.

Increase in **skilled workers** taking additional holidays.
21% to 31%

51%

of those taking additional trips are going for 4-7 nights. Breaks are getting longer

65%

of passengers are going to Europe

Maximise their experience

People are moving away from holiday as an 'escape' and more towards an 'experience'. Growing trend in travellers purchasing 'skip the line' tickets in order to access popular sites without queuing - making the most of time available.

For time and experience maximisers, services like **Fast Track** appeal.



OUR NEIGHBOURS GB



London as a route remains steady with

18%
pax travelling to London

This driven mainly by **business passengers**, with share of GB residents travelling for business increasing.



Passengers travelling UK Provincial Down

19%
to
17%

Proportion of GB residents travelling these routes down.

67%

GB residents feel Brexit is going badly



Uncertainty around Brexit is leading to a decrease in consumer sentiment across GB and NI. Expectations about the future of Brexit remain negative. **DAP may see the impact of this further down the line.**

35% passengers booking 1-3 months in advance

so a decline in consumer sentiment in the last few months may affect bookings later in the year.

NORTHERN IRELAND

+7%

Volume of passengers from NI

Similar to changes in the overall passenger profile:

29% to 33%
More **skilled workers**

27% to 33%
Additional holidays

Europe continues to be most popular region.

66% of NI passengers are travelling to Europe.

Madrid has beaten London for the most popular destination, reflecting the strategic marketing of the Madrid route in NI.

NI is considered a more price sensitive market, **value for money** is a key determinant of behaviour so any change in price will have a greater impact there.

Consumer sentiment down in NI

11
points

Uncertainty around Brexit and political deadlock impacting sentiment.

This a **watch out** as DAP could see impact later in the year.

