

GCC MARKET SNAPSHOT

GCC MARKET PROFILE | 2015



GCC MARKET OVERVIEW

COUNTRY	POPULATION	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
United Arab Emirates	9.4 million	4%	Dubai, Abu Dhabi	Arabic, English	AED
Kingdom of Saudi Arabia	29.4 million	8%	Riyadh, Jeddah, Mecca, Medina, Ad Dammam	Arabic	SAR
Bahrain	1.2 million	4%	Manama, Al Muharraq	Arabic, English, Farsi, Urdu	BHD
Kuwait	3.8 million	3%	Kuwait city	Arabic, English	KWD
Qatar	1.9 million	8%	Doha	Arabic, English	QAR
Oman	3.3 million	5%	Muscat	Arabic, English, Baluchi, Urdu, Indian dialects	OMR



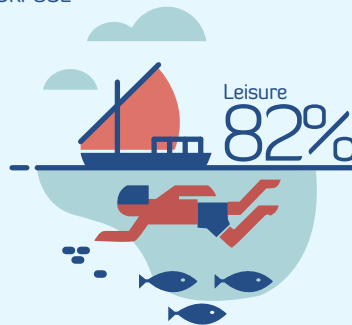
GCC OUTBOUND TRAVEL

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.Saudi Arabia
2. Lebanon
- 3.Oman
- 4.UK
- 5.Germany

EUROPE

1. United Kingdom
2. Germany
- 3.Switzerland
- 4.Italy
- 5.Austria

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.

GCC MARKET SNAPSHOT

GCC MARKET PROFILE | 2015



OUTBOUND TRAVEL TO IRELAND

Tourism Ireland best estimates

MARKET	2013	2014	2013 V'S 2014 % Variance
Middle East	50,000	55,000	10%

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+	GCC 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	<ul style="list-style-type: none"> - 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	<ul style="list-style-type: none"> - 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	14	4,494	Etihad Airways
Dubai	14	5,200	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. 28 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. One break, two cities: Ireland's proximity to the UK will encourage GCC nationals to travel to Ireland when visiting London during the summer months
5. Growing importance of social media in UAE

TOP 5 ATTRACTIONS

1. Horseracing/Breeding: and Golf
2. Nature & Scenery: Giant's Causeway, Cliffs of Moher, Wild Atlantic Way, Causeway Coastal Route
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



GCC MARKET SNAPSHOT

GCC MARKET PROFILE | 2015



TRAVEL TRADE MARKET

TRAVEL TRADE	OVERVIEW
Tour Operators / Wholesalers	10 major tour operators in the GCC with Emirates and Etihad Holidays being the largest.
Travel Agents	Traditional travel agencies are key to the GCC's travel planning process, with over 6,000 agencies across the region.
MICE	A small but growing sector
Online Travel Agents	Very few online travel agents in the market. Local travel agents are increasingly investing in online booking technology
Online direct with airlines & hotels	Popular with Western expats and becoming increasingly popular with GCC visitors

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	Ireland FIT tours
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

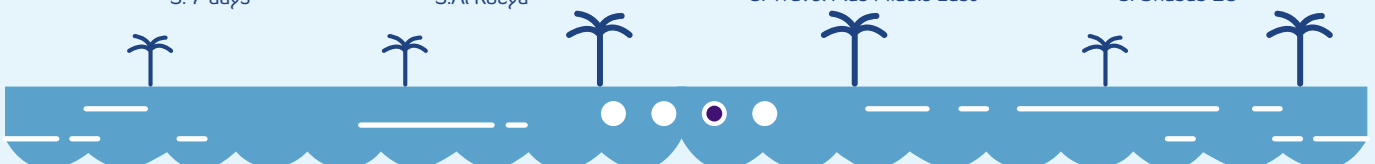
MEDIA LANDSCAPE

TOP 5 NEWSPAPERS

English	Arabic
1. Gulf news	1. Al Ittihad
2. The national	2. Al Bayan
3. Khaleej Times	3. Al Khaleej
4. The Gulf Today	4. Emarat Al Youm
5. 7 days	5. Al Roeya

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE/CONSUMERS

English	Arabic
1. Arabian Travel News	1. Ara Magazine
2. Business Traveller Middle East	2. Zahrat Al Khaleej
3. Travel Trade Gazette MENA	3. Travel Arabia
4. Travel Trade News Middle East	4. Laha Magazine
5. Travel Plus Middle East	5. Shabab 20



GCC MARKET SNAPSHOT

GCC MARKET PROFILE | 2015



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

