

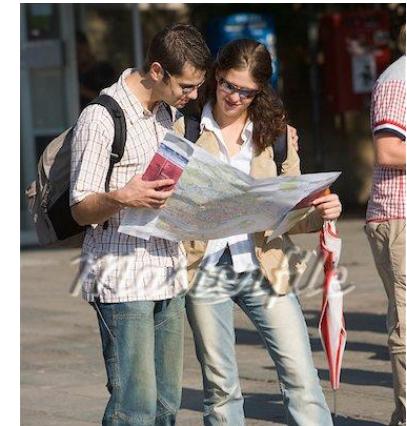
Delivering Growth to 2025

Mark Henry - Central Marketing Director

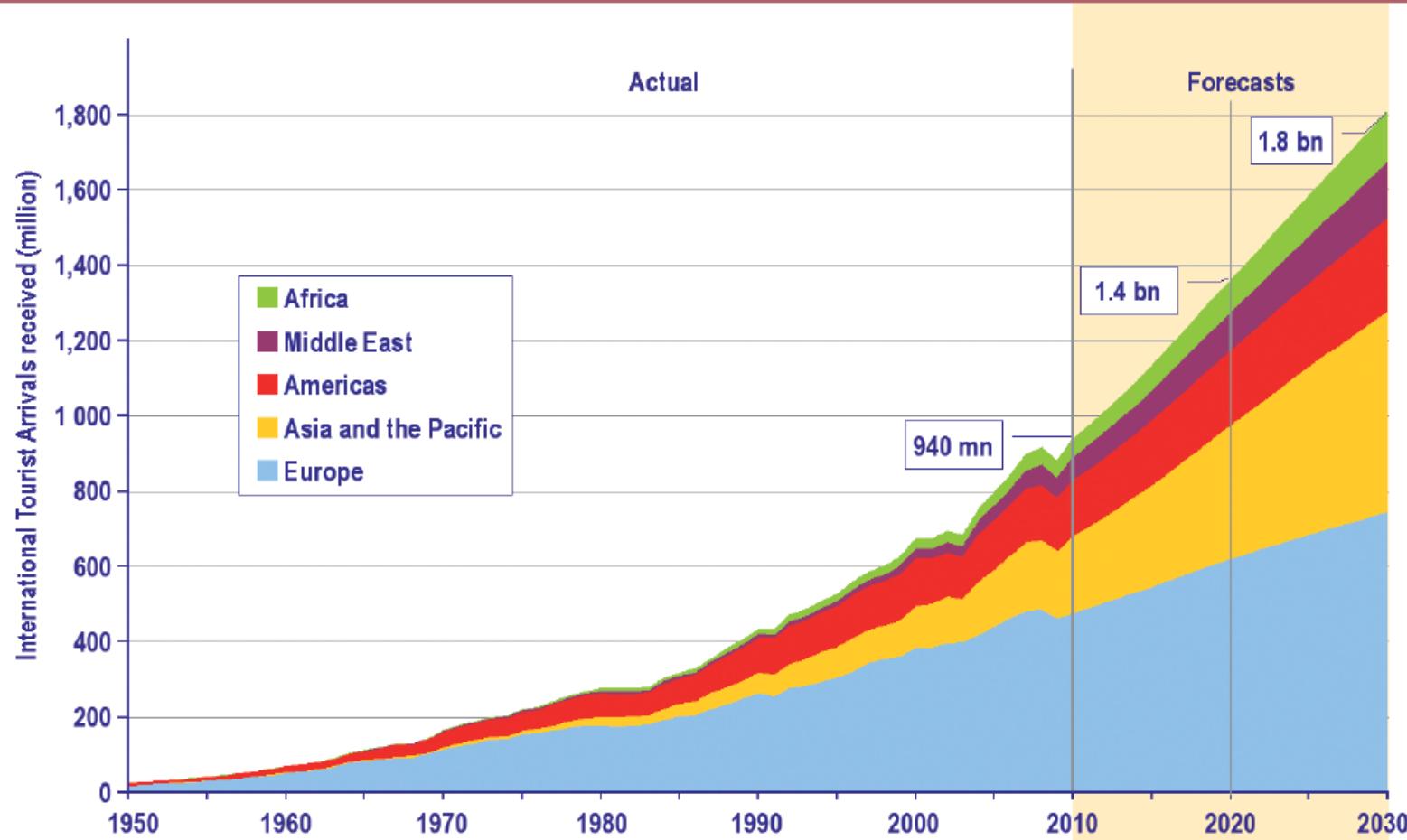


@Mark_J_Henry

Tourism in 2005

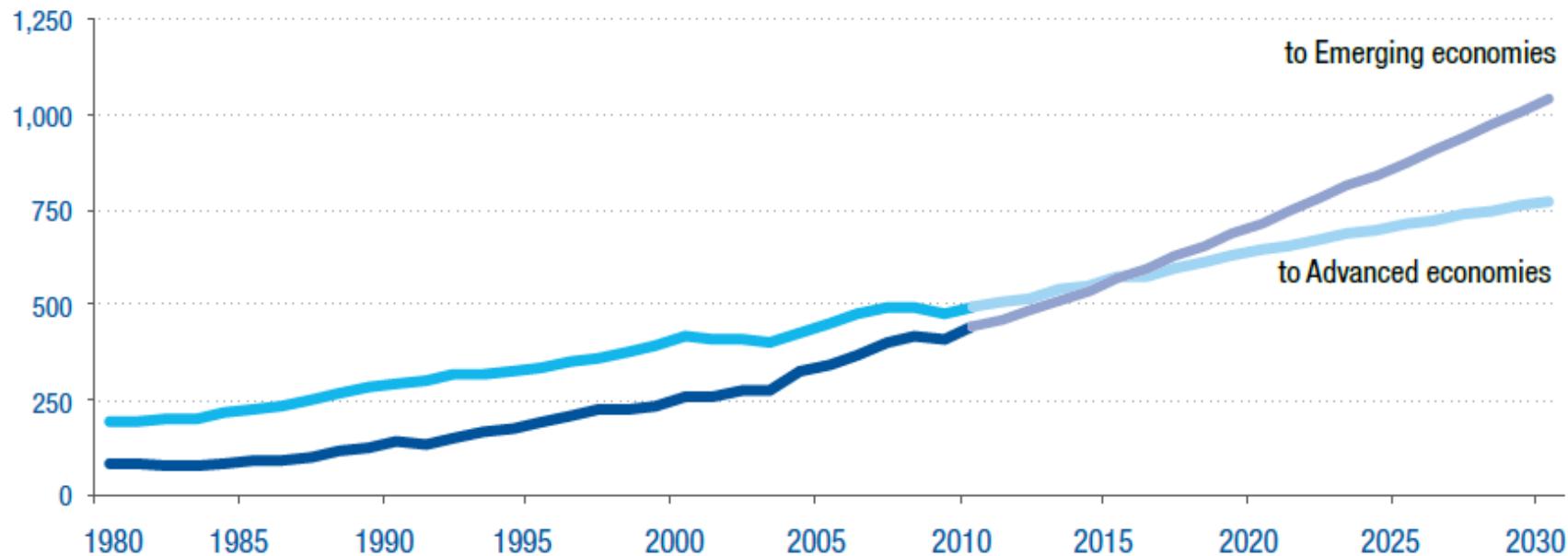


UNWTO Tourism Towards 2030: Actual trend and forecast 1950-2030



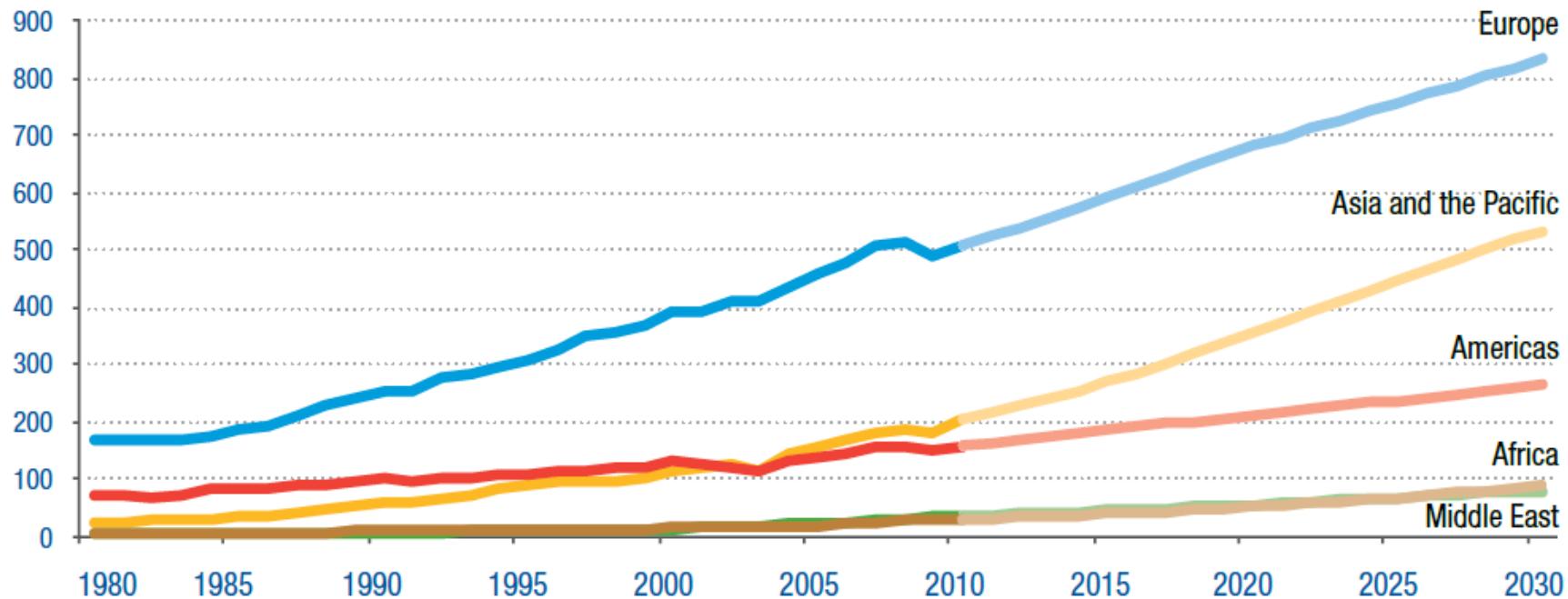
Inbound tourism, advanced and emerging economies

International Tourist Arrivals, million



Outbound tourism by region of origin

International Tourist Arrivals generated, million



City tourism, CAGR 2005-2010 [index =100]

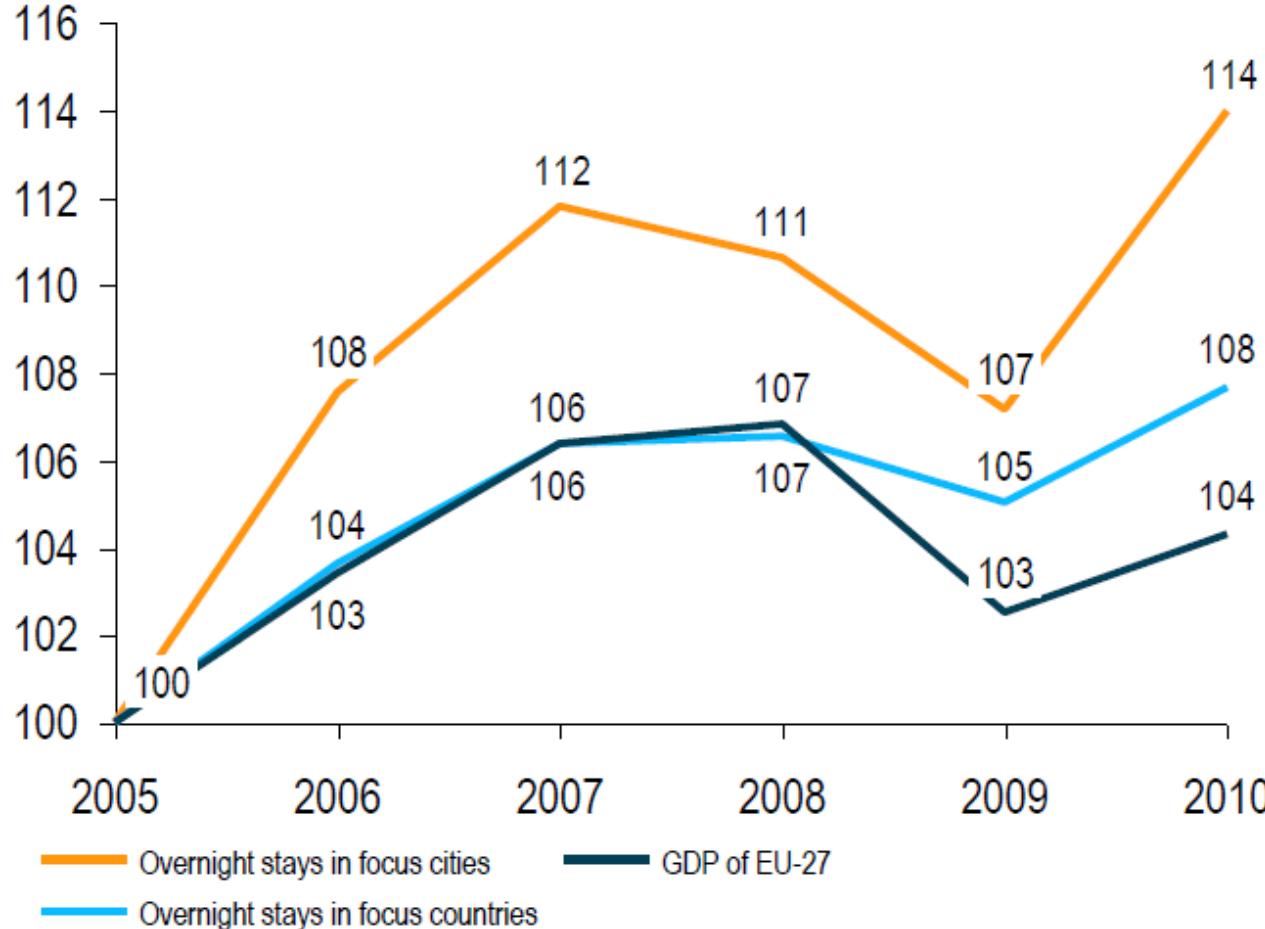
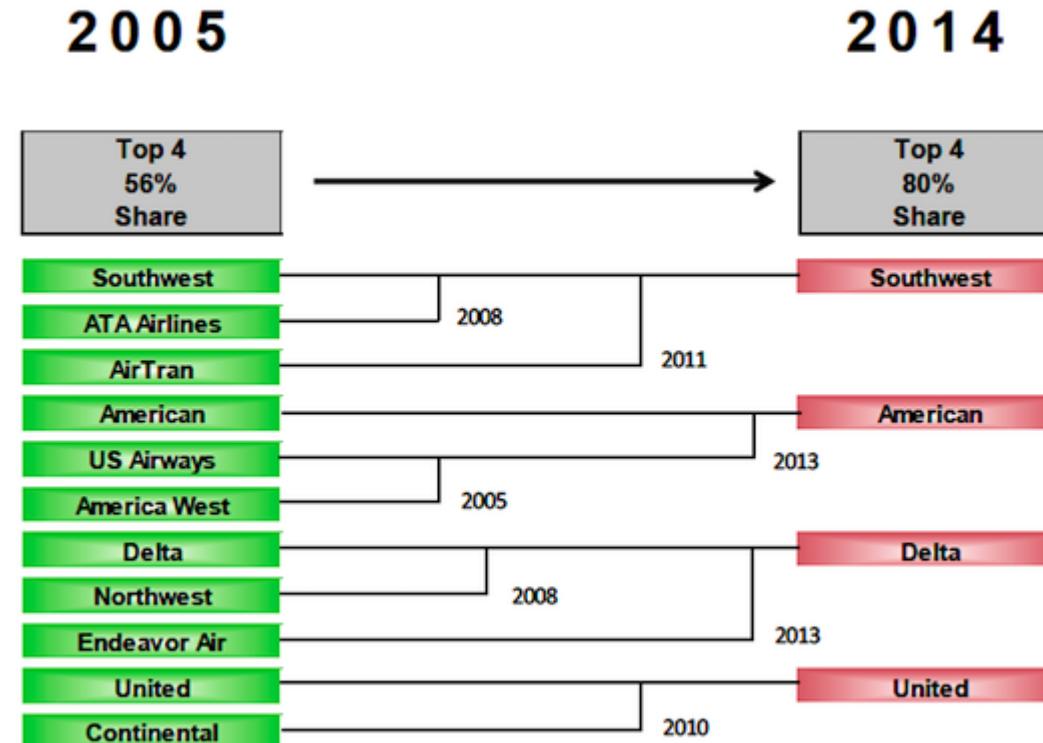


Figure 2: Major U.S. Airline Mergers, 2005-2014



Source: Department of Transportation, Database 1B Origin & Destination Survey for ticketing carriers Q2 2005 and 2014.



IAG



American Airlines



DELTA



Lufthansa



UNITED



AIRFRANCE KLM



Emirates



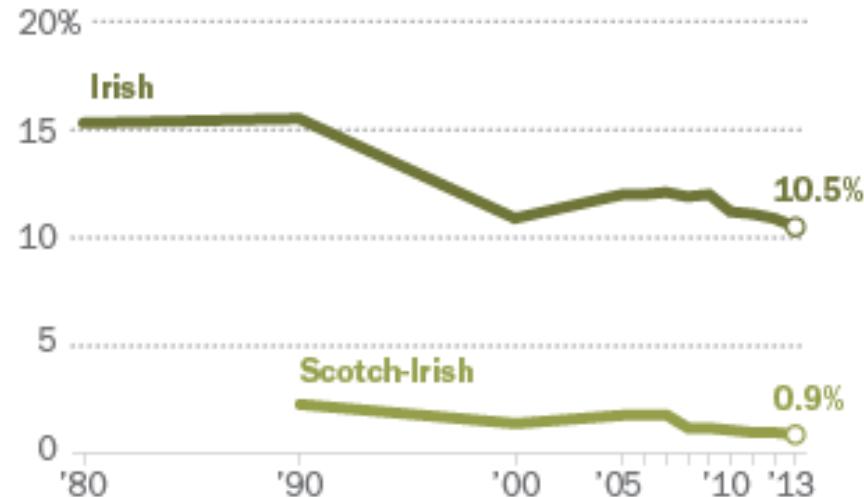
QATAR
AIRWAYS



الإتحاد
ETIHAD
AIRWAYS
ABU DHABI

In the U.S., Irish Ancestry is Declining

% of population who say they are of... ancestry



Source: Census Bureau

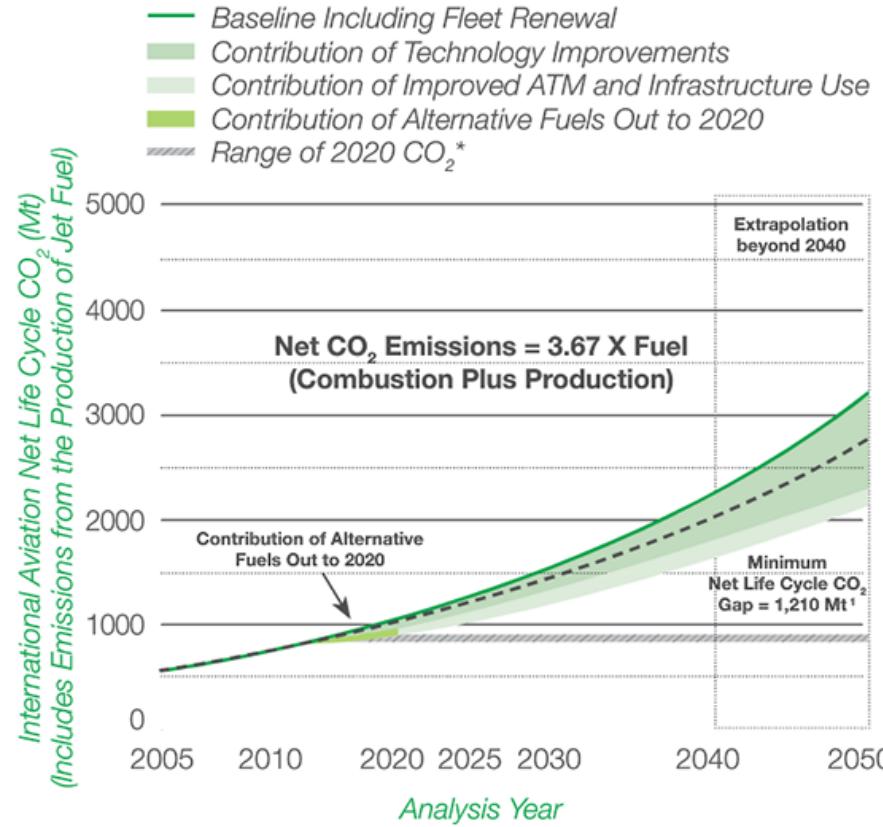
PEW RESEARCH CENTER



INTERNATIONAL CIVIL AVIATION ORGANIZATION

A United Nations Specialized Agency

Aviation industry emissions are set to grow 200%-360% on current levels by 2050, allowing for the maximum use of lower-carbon alternative fuels







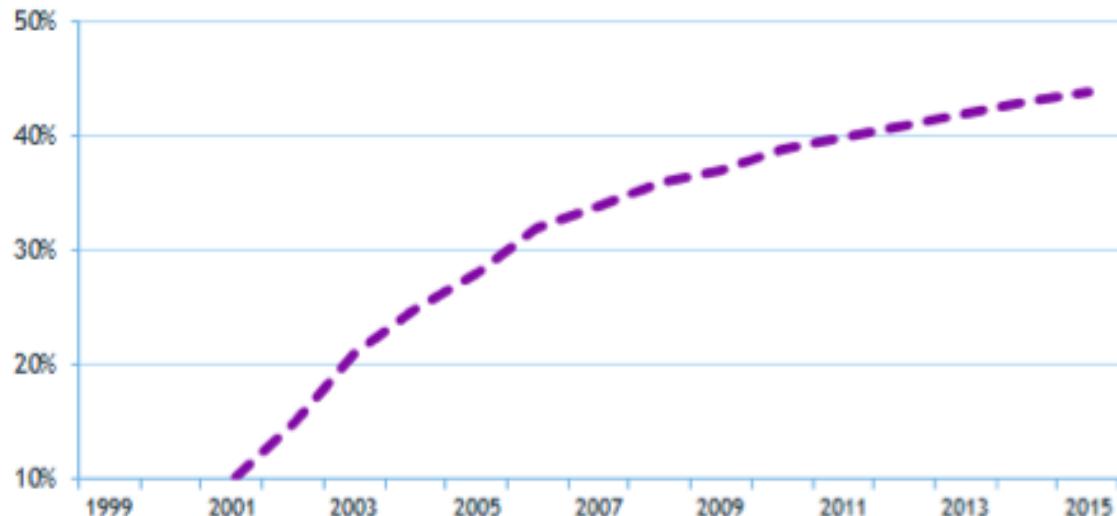


Longford Forest

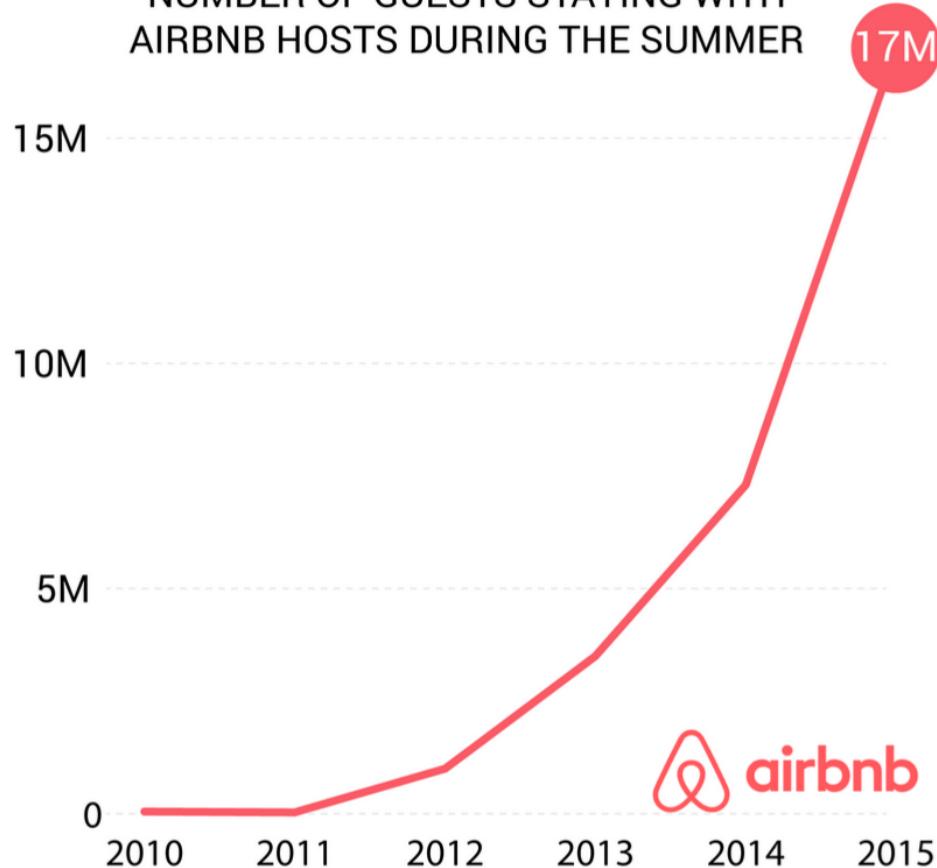
The next milestone



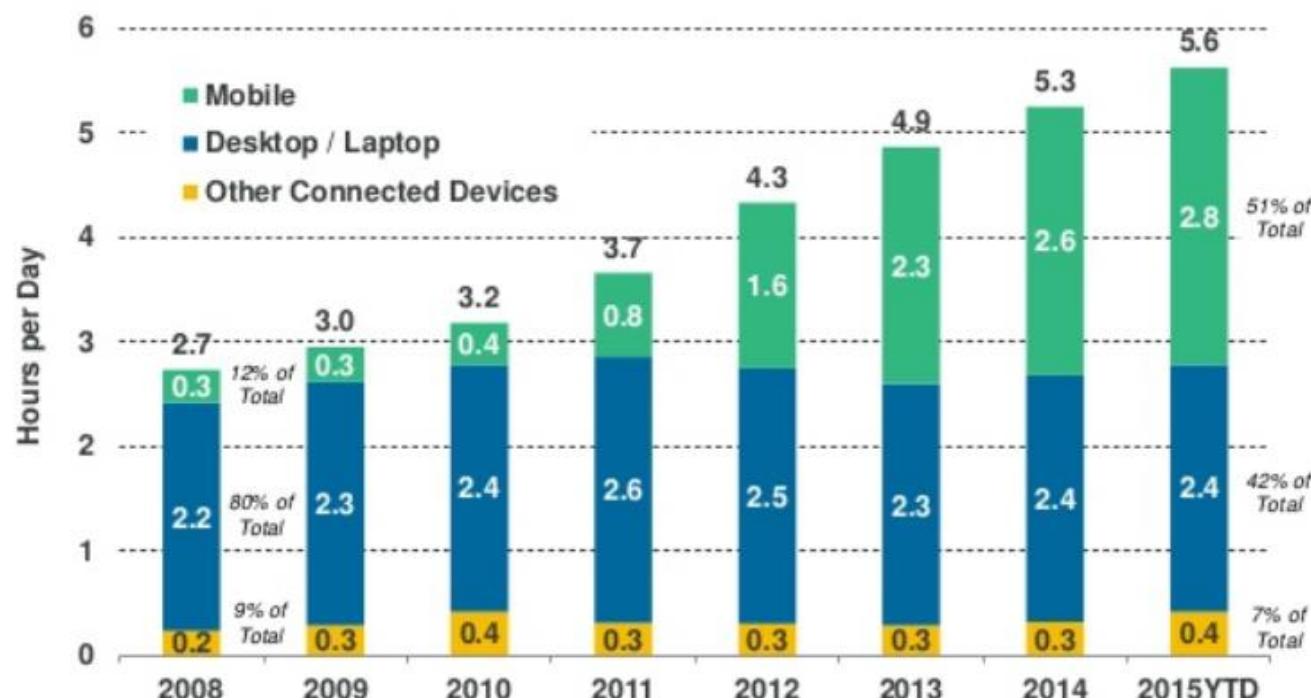
Online Travel Penetration - U.S. 1999-2015



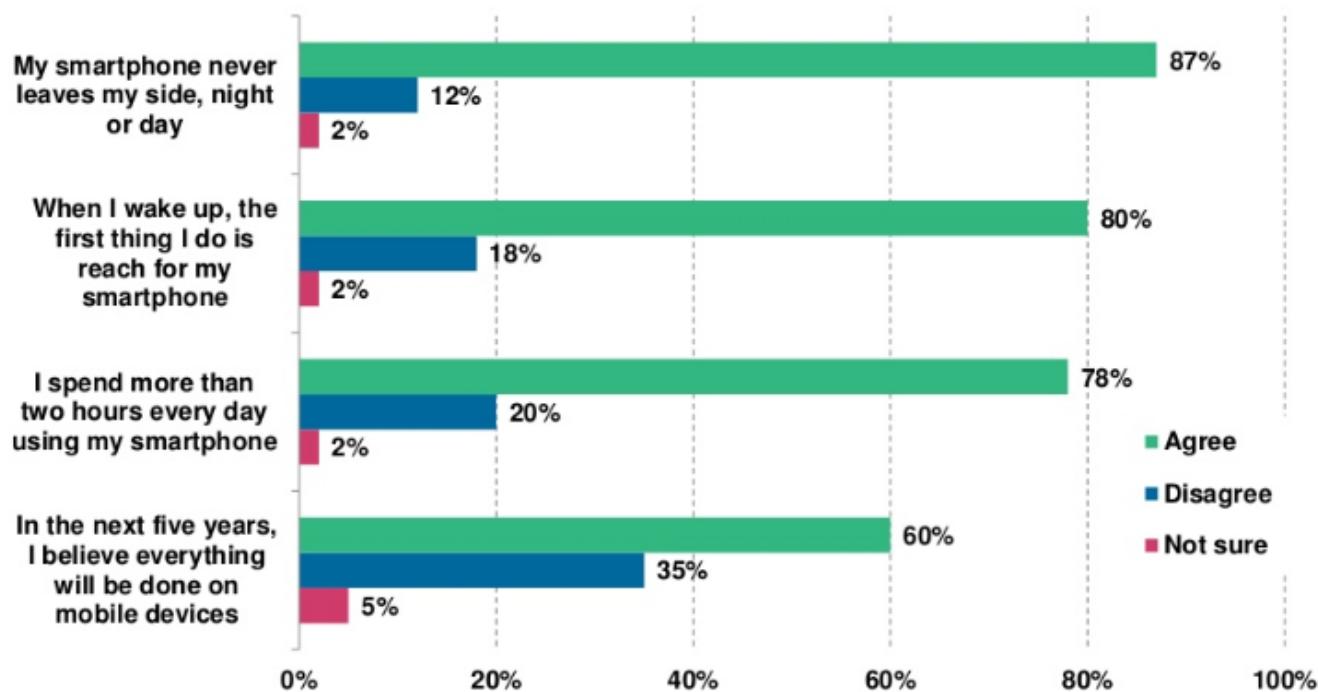
NUMBER OF GUESTS STAYING WITH
AIRBNB HOSTS DURING THE SUMMER



Time Spent per Adult User per Day with Digital Media, USA, 2008 – 2015YTD



Millennial Smartphone Behavior, USA, 2014





Google
reaches

2.9B

people every month

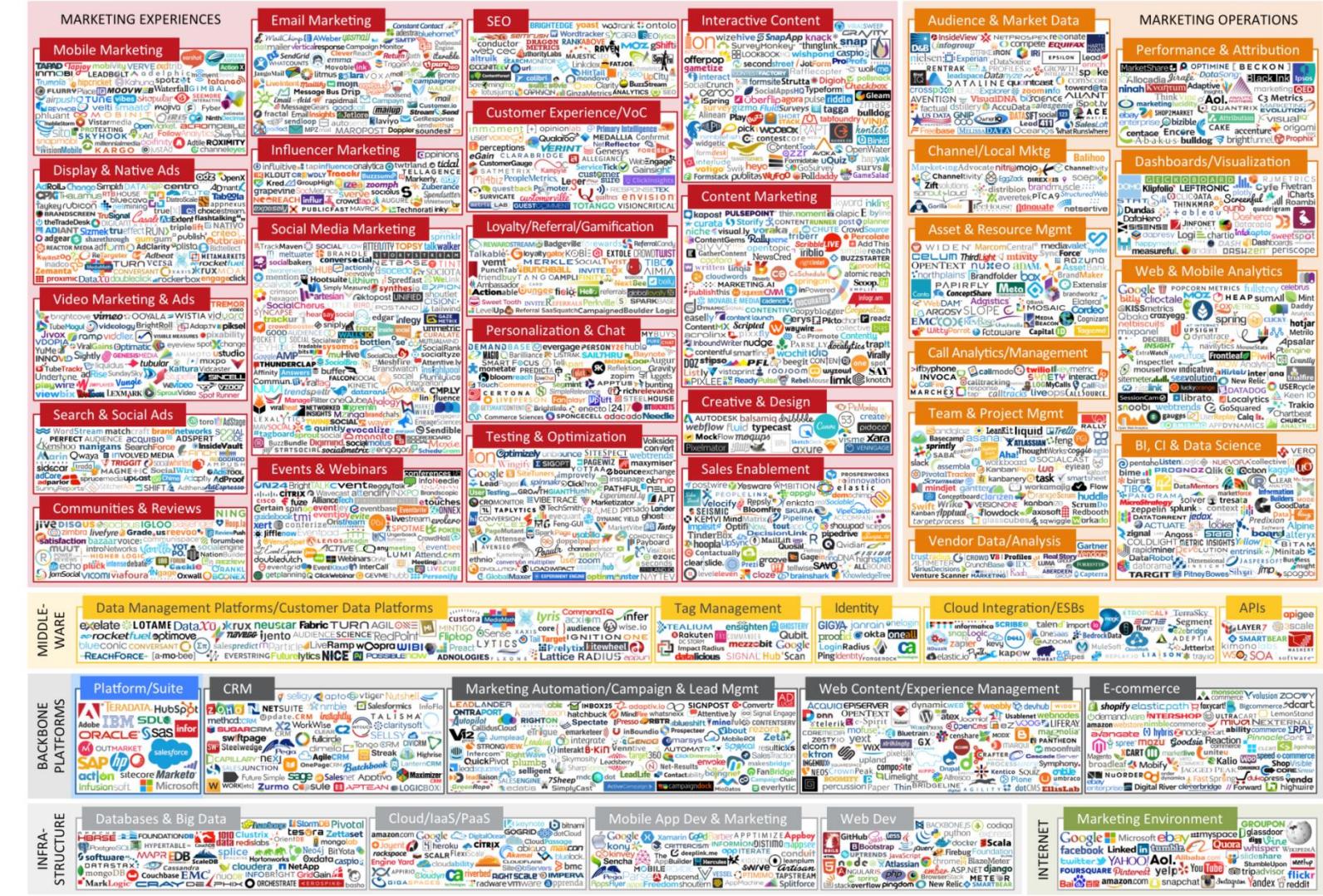
Marketing is Changing

Adobe

Adobe Digital RoadBlock Report 2015
Key Findings

Attitudes on Marketing/Marketers (% Top Two Box)





FEB 5, 2015 @ 09:20 PM 8,661 VIEWS

CEO Talk: Ford Expects Fully Autonomous Cars In 5 Years



Next-gen Audi A8 drives better than you

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Image 1 of 1

All-new Audi flagship's autonomous driving system to function "better than human beings"

The next-generation [Audi A8](#) luxury limousine will set a new standard in safety for the German brand.

Due in 2017 the A8 will be Audi's autonomous motoring pioneer. And according to one Audi executive, it will drive better than most human beings.

Toyotas Enter Highway Hands-Free as Driverless View Evolves

by [Craig Trudell](#) [Yuki Hagiwara](#)
[ctrud](#)

October 6, 2015 – 8:00 AM BST *Updated on October 7, 2015 – 8:35 AM BST*



The Washington Post

Transportation

Driverless cars are coming sooner than you think

'Transportation Secretary Anthony

Foxx anticipated that the technology would be fully rolled out within 10 years









BARCELONA CITY







What Might It All Mean?

Three Play-outs for Ireland

The Golden Decade

New success in developing markets – hold **global market share**

IAG makes Dublin a **European hub**, with spinoff overnights

Growing demand to **escape urban life** on holiday, facilitated by **self-driving cars** that take the hassle out of countryside access

Ireland seen as a '**green**' destination, in tune with nature

Growing demand unlocks significant private sector **product development** investment

Indigenous skill base puts us at leading edge of **tech in tourism**

=> 10 million visitors

=> €5bn revenue (in 2014 terms)

A Fair Share

Solid regional performance – we hold **European market share**

Dublin gains regional share as **city tourism** grows

Global **airline mergers** relegate Dublin to regional airport

Sharing economy growth reduces sector profitability & funding for new capital investment

Augmented reality reduces need to engage with the Irish

Privacy concerns limit marketing capabilities in key markets

=> **10 million visitors** => **€5bn revenue (in 2014 terms)**



The End of Growth

Environmental concerns about climate change & growing virtual reality penetration reduces foreign travel demand

Increased global competition & terrorist targeting eliminates European growth

Declining diaspora shrinks US market to Ireland

Loss of public support for continued growth – our competitive advantage of the Irish welcome disappears

Private sector product development reduced => vicious circle

=> 10 million visitors => €5b revenue (2014 terms)

How Can We Prepare?

Monitor destination **competitiveness**

Nurture cultural **differentiation**

Government & private sector **investment** to build capacity

Embrace **“digitalisation”**

 => automation & always-on

 => customer service & marketing

Investment in new **skills** development

Protect **community** support

Nimblility



Thank You

Mark Henry - Central Marketing Director



Tourism Ireland



@Mark_J_Henry