

# The passenger: An Evolving Profile

2018

↑ **SKILLED WORKERS**  
**+23%**

CONTINUE THEIR UPWARD CLIMB

**3.3m↑**  
**to 4m**

from 2017 to 2018

**KEY IMPACT FOR RETAIL, F&B AND CAR PARKS**

- Skilled workers are more likely to be **dropped off** than use a car park.
- They are **price conscious** and have a budget in mind.
- High end brands are not as attractive to this group.



↑ **NORTH AMERICAN**  
**+19%**

PASSENGERS ON THE RISE

**38%**  
Are 50+ yrs olds

**50%**  
Travel as a main holiday

↑ Skilled workers now  
**25%** share of North American pax, up from 16% in 2017



**+5**

DAP has 5 new routes to North America for 2019

Good news for retail, North Americans spend more than other pax. Buying in categories like alcohol<sup>1</sup> and souvenirs.

**2018**

The US economy was on a high. Performance in passenger's home economy will affect buying behaviour here.

↑ **OLDER NOT OLD!**  
**+15%**

50-64YR PASSENGERS ARE ON THE UP

More people in the 50-64yr age group are travelling through DAP.

THIS AGE GROUP LIKE **TO SHOP**  
**1 in 3**

ARE TRUE SHOPPERS<sup>2</sup>

More likely to buy perfume & cosmetics than other age groups. More likely to use a car park than other age groups.

**1 in 5**

**TRAVEL FOR BUSINESS**  
Attractive for DATS products like Airport Club and Fast Track.



↑ **TRANSFER ON HIGH**  
**+18%**

1.8M TRANSFER PASSENGERS 2018

Transfer passengers are up **3 years in a row**

**OUR NEW TRANSFER FACILITY**

offers one of the most efficient journeys anywhere, supporting transfer growth.

**2 in 3**

Transfers are North American residents

Transfer passengers from GB/Europe are less likely to recommend transferring through DAP - need to ensure this group have quick and easy access to essential facilities.

**KEY FACILITIES NEEDED:**

- Easy access to washrooms
- Reliable WiFi
- Charging points

## Brexit

THE QUESTIONS CONTINUE

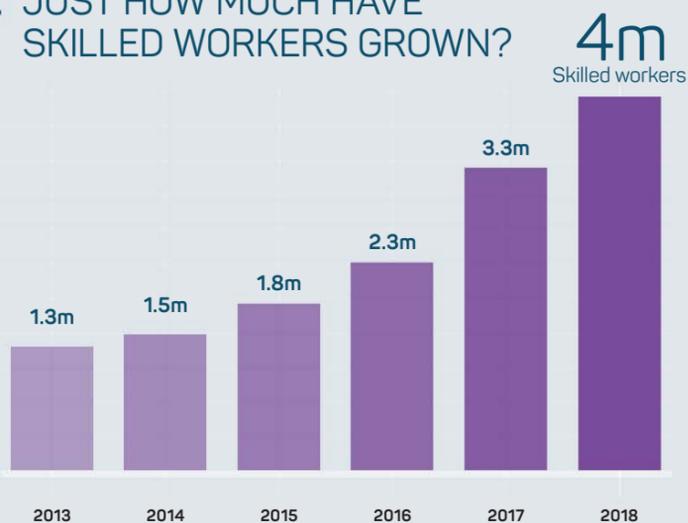
The ESRI found that the Irish economy will be hit harder by Brexit than any other EU state. Short term impact is dependent on how smooth the transition is.

## IMPACT ON OUR PASSENGERS

- Pax could limit their travel reducing "extra" short breaks due to caution over economy.
- Potential impact on our skilled workers, with construction in south and east of Ireland set to be impacted. (ESRI, 2019)



↑ **JUST HOW MUCH HAVE SKILLED WORKERS GROWN?**



<sup>1</sup> Alcohol not to be consumed in the airport

<sup>2</sup> True shopper - A passenger who purchases any item that is not to be consumed at the airport

SOURCE: Passenger Tracking 2013-2018. TREND DATA ESRI/KBC Consumer Sentiment Index (2018), Red C Consumer Mood Monitor (2018) Deloitte economic forecast outlook (2018) Tourism Ireland SOAR (2018) Ireland and Brexit: modelling the impact of deal and no deal scenarios (ESRI 2019) INFORMATION BASED ON FULL YEAR 2018