The passenger: An Evolving Profile

2018



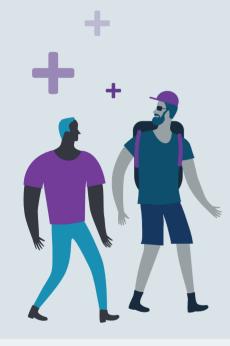
CONTINUE THEIR UPWARD CLIMB

3.3m₁ 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.





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



Good news for retail, North
Americans spend more than other
pax. Buying in categories like
alcohol¹ and souvenirs.

2018

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

1 OLDER NOT OLD! +15%

50-64YR PASSENGERS ARE ON THE UP

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

TO SHOP iii 1 in 3

ARE TRUE SHOPPERS²

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

Attractive for DATS products like Airport Club and Fast Track.



JUST HOW MUCH HAVE SKILLED WORKERS GROWN? 3.3m 1.5m 2.3m 3.3m 2.3m 2.3m

TRANSFER ON HIGH +18%

1.8M TRANSFER PASSENGERS 2018

years in a row

OUR NEW

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

2 in 3 iii

North American residents

Transfer passengers from
GB/Europe are less likely
to recommend transferring
through DAP - need to ensure

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.

