IRELAND
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%.

1 in 4 net new jobs were created by Travel & Tourism over the last five years.

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>15%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>25%</td>
</tr>
</tbody>
</table>

All values are in constant 2019 prices & exchange rates
As reported in March 2020

IRELAND 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

4.3% OF TOTAL ECONOMY
Total T&T GDP = EUR14.9BN (USD16.6BN)

+1.1%
2019 Travel & Tourism GDP growth vs +5.3% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

135.5 JOBS (000's)
(5.9% of total employment)

INTERNATIONAL VISITOR IMPACT

EUR12.6BN
in visitor spend (3.0% of total exports)
(USD14.0BN)

INBOUND ARRIVALS

1. UNITED KINGDOM 46%
2. UNITED STATES 14%
3. GERMANY 6%
4. FRANCE 5%
5. SPAIN 4%
REST OF WORLD 25%

OUTBOUND DEPARTURES

1. UNITED KINGDOM 28%
2. SPAIN 21%
3. FRANCE 14%
4. UNITED STATES 5%
5. ITALY 4%
REST OF WORLD 28%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING: 71%
- BUSINESS SPENDING: 29%
- DOMESTIC SPENDING: 21%
- INTERNATIONAL SPENDING: 79%

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