

## TOURIST PROFILE BY ISLAND OF STAY (2022)

### IRELAND



#### How many are they and how much do they spend?



	LZ	FUE	GC	TFE	LP
<b>TOURISTS</b>					
<b>Tourist arrivals (FRONTUR) (*)</b>	<b>270</b>	<b>38</b>	<b>81</b>	<b>181</b>	<b>0</b>
<b>Tourist arrivals &gt; 15 years old (EGT) (*)</b>	<b>226</b>	<b>33</b>	<b>70</b>	<b>156</b>	<b>1</b>
- book holiday package (*)	65	10	18	44	0
- do not book holiday package (*)	160	23	51	111	1
- % tourists who book holiday package	29.0%	29.1%	26.3%	28.6%	0.0%

(\*) Thousands of tourists



	LZ	FUE	GC	TFE	LP
<b>Expenditure per tourist (€)</b>	<b>1,430</b>	<b>1,323</b>	<b>1,385</b>	<b>1,464</b>	<b>--</b>
- book holiday package	1,477	1,288	1,242	1,652	--
- holiday package	1,070	1,065	895	1,199	--
- others	407	222	348	453	--
- do not book holiday package	1,412	1,338	1,436	1,389	--
- flight	405	417	390	375	--
- accommodation	531	441	547	484	--
- others	475	479	499	529	--
<b>Average lenght of stay</b>	<b>8.95</b>	<b>8.64</b>	<b>9.12</b>	<b>8.94</b>	<b>--</b>
- book holiday package	7.86	7.49	8.30	8.35	--
- do not book holiday package	9.40	9.11	9.42	9.18	--
<b>Average daily expenditure (€)</b>	<b>180.4</b>	<b>170.3</b>	<b>168.4</b>	<b>178.7</b>	<b>--</b>
- book holiday package	196.5	182.5	153.5	196.6	--
- do not book holiday package	173.8	165.4	173.7	171.5	--
<b>Total turnover (&gt; 15 years old) (€m)</b>	<b>323</b>	<b>44</b>	<b>97</b>	<b>228</b>	<b>--</b>
- book holiday package	97	12	23	73	--
- do not book holiday package	226	31	74	154	--

#### Where did they spend their main holiday last year?\*

	LZ	FUE	GC	TFE	LP
Didn't have holidays	48.0%	42.8%	32.4%	38.6%	--
Canary Islands	30.1%	33.2%	38.0%	24.9%	--
Other destination	21.9%	24.1%	29.6%	36.4%	--

#### What other destinations did they consider for this trip?\*

	LZ	FUE	GC	TFE	LP
None (I was clear about "this Canary Island")	37.0%	43.7%	25.4%	23.6%	--
Canary Islands (other island)	18.1%	21.9%	23.1%	23.6%	--
Other destination	44.9%	34.4%	51.5%	52.8%	--

\*Percentage of valid answers

Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

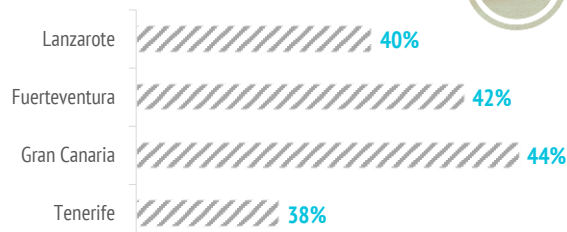
#### Importance of each factor in the destination choice



	LZ	FUE	GC	TFE	LP
Climate	80.0%	82.3%	84.6%	76.9%	--
Safety	74.0%	62.1%	73.8%	65.5%	--
Accommodation supply	61.1%	54.3%	60.9%	52.7%	--
Price	55.3%	49.0%	59.8%	54.3%	--
Tranquility	58.4%	53.0%	56.2%	49.4%	--
Effortless trip	53.8%	54.8%	51.2%	48.1%	--
European belonging	46.3%	40.9%	51.6%	47.5%	--
Sea	42.2%	47.1%	47.6%	42.4%	--
Beaches	39.9%	42.3%	43.6%	37.6%	--
Gastronomy	35.8%	34.3%	38.3%	35.2%	--
Environment	33.3%	33.3%	34.6%	35.2%	--
Fun possibilities	25.9%	24.9%	28.7%	31.4%	--
Authenticity	23.2%	27.9%	29.8%	21.9%	--
Landscapes	19.4%	17.7%	20.2%	19.7%	--
Shopping	16.0%	13.0%	18.4%	18.1%	--
Nightlife	13.3%	6.2%	16.6%	14.1%	--
Exoticism	9.1%	10.5%	14.5%	11.0%	--
Culture	9.0%	14.1%	10.1%	9.0%	--
Historical heritage	5.3%	11.2%	6.6%	6.3%	--
Hiking trail network	4.3%	3.4%	4.5%	5.7%	--

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important") of tourists who indicate that the factor is "very important" in their choice.

#### % TOURISTS WHO CHOOSE BEACHES



#### What is the main motivation for their holidays?



	LZ	FUE	GC	TFE	LP
Rest	73.5%	65.4%	75.0%	64.3%	--
Enjoy family time	13.2%	17.3%	13.1%	14.0%	--
Have fun	7.1%	7.2%	5.3%	10.2%	--
Explore the destination	2.6%	4.2%	4.3%	9.9%	--
Practice their hobbies	1.2%	-	0.4%	1.2%	--
Other reasons	2.4%	5.9%	2.0%	0.4%	--

#### How far in advance do they book their trip?



	LZ	FUE	GC	TFE	LP
The same day	0.2%	-	1.2%	0.3%	--
Between 1 and 30 days	12.7%	16.7%	19.2%	12.2%	--
Between 1 and 2 months	22.0%	11.0%	31.0%	24.5%	--
Between 3 and 6 months	34.5%	45.5%	29.5%	35.5%	--
More than 6 months	30.6%	26.8%	19.1%	27.5%	--

## TOURIST PROFILE BY ISLAND OF STAY (2022)

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## What channels did they use to get information about the trip?

	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	75.3%	61.9%	64.8%	55.5%	--
Friends or relatives	29.1%	20.3%	30.1%	34.1%	--
Internet or social media	52.3%	52.5%	47.6%	57.9%	--
Mass Media	2.2%	5.5%	2.6%	4.1%	--
Travel guides and magazines	4.2%	12.7%	2.9%	3.3%	--
Travel Blogs or Forums	4.1%	6.0%	3.6%	7.0%	--
Travel TV Channels	0.7%	3.0%	1.8%	1.3%	--
Tour Operator or Travel Agency	13.6%	14.0%	11.8%	12.2%	--
Public administrations or similar	2.0%	0.0%	0.5%	2.2%	--
Others	2.7%	2.1%	3.5%	2.3%	--

\* Multi-choise question

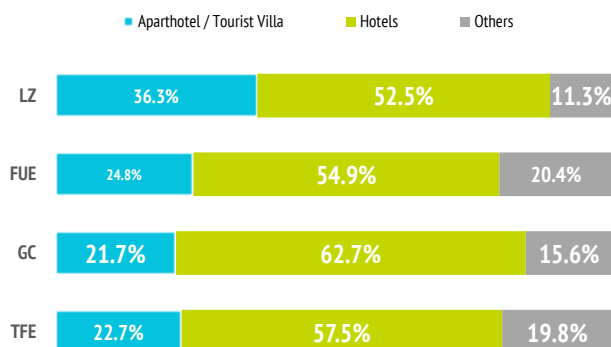
## With whom did they book their flight and accommodation?

	LZ	FUE	GC	TFE	LP
<b>Flight</b>					
- Directly with the airline	72.7%	73.0%	68.7%	72.9%	--
- Tour Operator or Travel Agency	27.3%	27.0%	31.3%	27.1%	--
<b>Accommodation</b>					
- Directly with the accommodation	58.0%	54.8%	55.5%	53.9%	--
- Tour Operator or Travel Agency	42.0%	45.2%	44.5%	46.1%	--

## Where do they stay?

	LZ	FUE	GC	TFE	LP
1-2-3* Hotel	8.0%	17.7%	17.9%	10.9%	--
4* Hotel	34.6%	31.2%	34.8%	32.5%	--
5* Hotel / 5* Luxury Hotel	9.9%	5.9%	10.0%	14.1%	--
Aparthotel / Tourist Villa	36.3%	24.8%	21.7%	22.7%	--
House/room rented in a private dwelling	3.4%	1.9%	6.4%	6.8%	--
Private accommodation (1)	4.5%	16.9%	5.4%	6.2%	--
Others (Cottage, cruise, camping,...)	3.3%	1.5%	3.8%	6.8%	--

(1) Own property /House of friends or relatives / Free housing exchange / Other private accommodation.



## What do they book?

	LZ	FUE	GC	TFE	LP
Room only	39.6%	39.6%	41.3%	38.3%	--
Bed and Breakfast	21.0%	17.2%	26.4%	29.7%	--
Half board	18.2%	8.0%	8.0%	15.5%	--
Full board	2.3%	2.5%	2.3%	2.6%	--
All inclusive	18.8%	32.8%	22.0%	13.8%	--

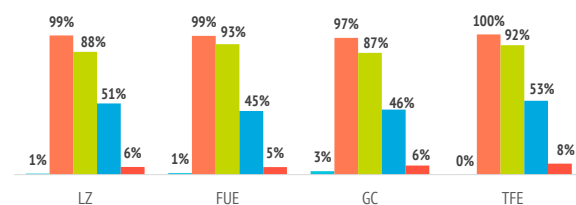
## Other expenses

	LZ	FUE	GC	TFE	LP
Restaurants or cafes	78.9%	73.1%	72.4%	77.5%	--
Supermarkets	68.3%	65.6%	59.8%	62.1%	--
Car rental	16.9%	19.0%	11.7%	22.9%	--
Organized excursions	18.3%	12.5%	13.6%	27.9%	--
Taxi, transfer, chauffeur service	60.1%	38.5%	58.9%	57.1%	--
Theme Parks	9.4%	1.6%	8.2%	19.7%	--
Sport activities	10.0%	12.1%	8.4%	13.0%	--
Museums	5.7%	1.0%	2.3%	1.7%	--
Flights between islands	5.9%	7.0%	4.1%	4.5%	--

## Activities in the Canary Islands

	LZ	FUE	GC	TFE	LP
Outdoor time per day					
0 hours	0.8%	1.1%	2.5%	0.1%	--
1 - 2 hours	11.7%	6.0%	10.7%	7.7%	--
3 - 6 hours	36.8%	47.6%	40.4%	39.5%	--
7 - 12 hours	45.3%	39.9%	39.9%	44.8%	--
More than 12 hours	5.5%	5.4%	6.5%	7.8%	--

■ 0 hours 
 ■ More than 1 hour 
 ■ More than 3 hours 
 ■ More than 7 hours 
 ■ More than 12 hours



	LZ	FUE	GC	TFE	LP
Activities in the Canary Islands					
Walk, wander	87.1%	71.2%	74.0%	78.5%	--
Swimming pool, hotel facilities	73.6%	66.5%	70.9%	74.8%	--
Beach	73.1%	71.9%	71.6%	67.9%	--
Explore the island on their own	30.6%	36.3%	29.6%	33.4%	--
Nightlife / concerts / shows	23.1%	15.1%	26.9%	26.9%	--
Taste Canarian gastronomy	24.1%	23.0%	21.9%	23.9%	--
Organized excursions	14.2%	11.9%	13.7%	24.3%	--
Theme parks	13.9%	8.1%	12.8%	23.7%	--
Swim	13.1%	15.1%	11.9%	15.0%	--
Sea excursions / whale watching	7.4%	6.0%	12.9%	16.2%	--
Beauty and health treatments	8.3%	3.1%	11.8%	12.5%	--
Wineries / markets / popular festivals	10.1%	9.5%	8.5%	6.1%	--
Hiking	6.4%	7.1%	9.1%	6.2%	--
Cycling / Mountain bike	11.1%	0.9%	3.4%	2.3%	--
Running	6.5%	3.6%	6.9%	4.1%	--
Museums / exhibitions	5.4%	2.2%	5.9%	4.9%	--
Practice other sports	4.1%	2.1%	5.4%	4.6%	--
Golf	2.7%	2.9%	3.9%	5.8%	--
Other Nature Activities	2.7%	1.8%	5.3%	2.0%	--
Surf	1.5%	1.2%	1.5%	4.1%	--
Scuba Diving	2.0%	2.0%	2.2%	2.8%	--
Astronomical observation	1.2%	2.6%	1.3%	2.3%	--
Windsurf / Kitesurf	1.1%	2.1%	2.2%	1.4%	--

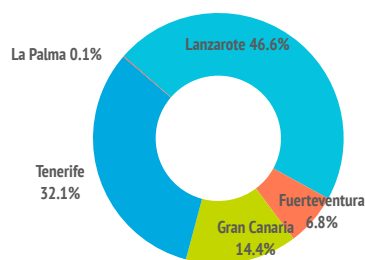
\* Multi-choise question

## TOURIST PROFILE BY ISLAND OF STAY (2022)

### IRELAND



#### Which island do they choose?



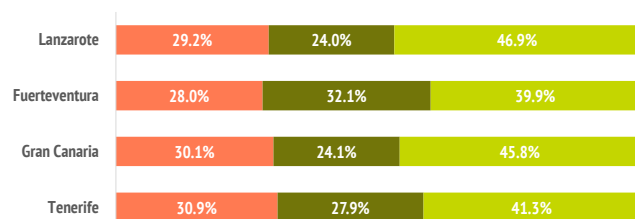
#### How many islands do they visit during their trip?

	LZ	FUE	GC	TFE	LP
One island	96.6%	93.3%	92.0%	92.9%	--
Two islands	3.4%	6.7%	7.1%	6.4%	--
Three or more islands	--	--	1.0%	0.6%	--

#### Sustainable destination

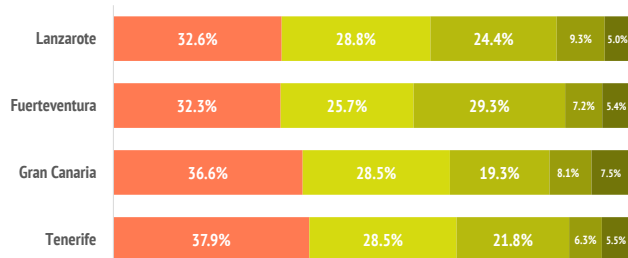
##### When booking a trip, do they tend to choose the most sustainable options?

■ No 
 ■ Yes, even if it means some inconvenience (price, time, hassle, etc) 
 ■ Yes, but only if it is not inconvenient



##### Would they be willing to spend more on travel to reduce their carbon footprint?

■ No 
 ■ Yes, up to 5% more 
 ■ Yes, up to 10% more 
 ■ Yes, up to 20% more 
 ■ Yes, over 20% more



Perception during their stay*	LZ	FUE	GC	TFE	LP
Quality of life on the island	8.19	8.33	8.17	7.93	--
Tolerance towards tourism	8.66	8.79	8.52	8.45	--
Cleanliness of the island	8.86	8.22	8.60	8.39	--
Air quality	8.77	8.80	8.52	8.38	--
Rational water consumption	7.88	7.81	7.82	7.49	--
Energy saving	7.22	7.08	7.20	6.74	--
Use of renewable energy	7.36	7.32	7.30	6.59	--
Recycling	7.64	7.33	7.40	7.12	--
Easy to get around by public transport	8.10	7.71	7.92	7.51	--
Overcrowding in tourist areas	6.88	7.10	6.68	6.70	--
Supply of local products	7.18	7.30	7.01	7.01	--

\* Scale 0 - 10 (0 = Not important and 10 = Very important)

#### Which is the most visited place on each island?



The data refers to % of tourists on each island who have visited the place.

#### How do they rate the Canary Islands?

Satisfaction (scale 0-10)	LZ	FUE	GC	TFE	LP
Average rating	8.99	9.02	8.91	8.76	--

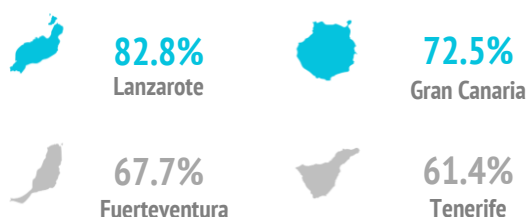
Experience in the Canary Islands	LZ	FUE	GC	TFE	LP
Worse or much worse than expected	1.8%	0.0%	1.5%	2.2%	--
Lived up to expectations	60.3%	60.1%	52.0%	45.8%	--
Better or much better than expected	37.9%	39.9%	46.5%	52.0%	--

Future intentions (scale 1-10)	LZ	FUE	GC	TFE	LP
Return to the Canary Islands	9.23	9.26	9.04	8.81	--
Recommend visiting the Canary Islands	9.32	9.36	9.14	9.05	--

#### How many are loyal to the Canary Islands?

	LZ	FUE	GC	TFE	LP
Repeat tourists of the island	82.8%	67.7%	72.5%	61.4%	--
At least 10 previous visits	21.7%	15.6%	18.6%	6.1%	--
Repeat tourists	88.9%	81.1%	81.2%	72.6%	--
At least 10 previous visits	34.4%	29.7%	34.3%	23.5%	--

#### REPEAT TOURIST OF EACH ISLAND



## TOURIST PROFILE BY ISLAND OF STAY (2022)

### IRELAND

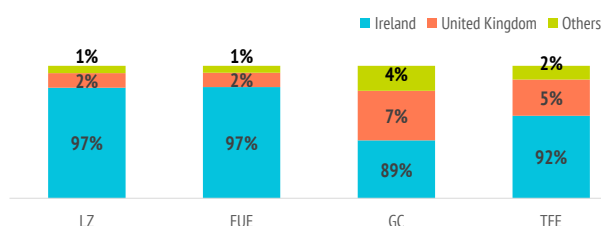


#### Where does the flight come from?



	LZ	FUE	GC	TFE	LP
Ireland	96.7%	96.8%	88.7%	92.5%	--
United Kingdom	2.2%	2.2%	7.5%	5.5%	--
Mainland Spain	0.8%	--	1.5%	1.9%	--
Poland	0.2%	--	0.8%	--	--
Portugal	--	--	0.6%	0.1%	--
France	0.1%	1.0%	--	--	--
Hungary	--	--	0.6%	--	--

#### SHARE OF TOURIST BY ORIGIN OF THE FLIGHT



#### Who do they come with?



	LZ	FUE	GC	TFE	LP
Unaccompanied	6.5%	9.7%	12.3%	8.3%	--
Only with partner	45.3%	31.5%	42.2%	50.2%	--
Only with children (< 13 years old)	5.2%	4.8%	4.7%	4.8%	--
Partner + children (< 13 years old)	8.4%	8.0%	5.0%	6.2%	--
Other relatives	17.7%	25.5%	14.2%	13.2%	--
Friends	4.1%	2.5%	9.6%	8.3%	--
Work colleagues	0.0%	0.0%	0.0%	0.1%	--
Organized trip	0.0%	0.8%	0.0%	0.0%	--
Other combinations <sup>(1)</sup>	12.8%	17.2%	12.1%	8.9%	--

(1) Different situations have been isolated

<b>Tourists with children</b>	<b>22.9%</b>	<b>24.8%</b>	<b>15.3%</b>	<b>17.3%</b>	--
- Between 0 and 2 years old	0.7%	1.6%	0.6%	1.4%	--
- Between 3 and 12 years old	21.2%	22.7%	13.3%	14.8%	--
- Between 0-2 and 3-12 years	0.9%	0.5%	1.4%	1.0%	--

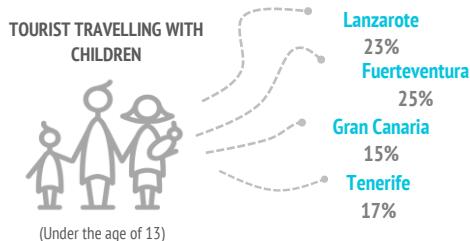
<b>Tourists without children</b>	<b>77.1%</b>	<b>75.2%</b>	<b>84.7%</b>	<b>82.7%</b>	--
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#### Group composition:

- 1 person	9.7%	10.3%	15.8%	10.7%	--
- 2 people	48.2%	38.1%	52.3%	54.9%	--
- 3 people	11.0%	20.6%	11.2%	10.5%	--
- 4 or 5 people	25.9%	24.1%	12.1%	18.8%	--
- 6 or more people	5.2%	6.9%	8.6%	5.1%	--

<b>Average group size:</b>	<b>2.91</b>	<b>3.02</b>	<b>2.63</b>	<b>2.68</b>	--
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\*People who share the main expenses of the trip



Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

#### Who are they?



	LZ	FUE	GC	TFE	LP
<b>Gender</b>					
Men	52.2%	51.2%	48.5%	41.1%	--
Women	47.8%	48.8%	51.5%	58.9%	--
<b>Age</b>					
Average age (tourist > 15 years old)	50.7	46.5	46.0	44.8	--
Standard deviation	14.8	14.6	15.3	16.2	--
<b>Age range (&gt; 15 years old)</b>					
16 - 24 years old	6.1%	6.8%	9.3%	13.3%	--
25 - 30 years old	5.1%	12.2%	8.3%	12.6%	--
31 - 45 years old	24.0%	26.2%	35.8%	26.1%	--
46 - 60 years old	36.7%	40.9%	24.7%	25.0%	--
Over 60 years old	28.0%	13.8%	21.9%	23.1%	--
<b>Occupation</b>					
Salaried worker	55.4%	64.7%	66.3%	65.8%	--
Self-employed	10.7%	11.3%	11.2%	9.5%	--
Unemployed	0.1%	0.0%	0.3%	1.3%	--
Business owner	7.8%	4.9%	3.1%	3.9%	--
Student	2.3%	6.2%	2.8%	2.8%	--
Retired	21.5%	11.3%	15.3%	15.1%	--
Unpaid domestic work	1.5%	0.6%	1.1%	1.4%	--
Others	0.7%	0.9%	0.0%	0.2%	--
<b>Annual household income level</b>					
Less than €25,000	7.4%	7.8%	5.7%	7.5%	--
€25,000 - €49,999	27.2%	22.5%	25.0%	30.1%	--
€50,000 - €74,999	24.0%	31.7%	33.2%	24.8%	--
More than €74,999	41.4%	38.0%	36.2%	37.5%	--
<b>Education level</b>					
No studies	2.8%	4.6%	2.7%	3.2%	--
Primary education	1.9%	0.0%	0.8%	1.8%	--
Secondary education	24.0%	30.2%	14.5%	17.9%	--
Higher education	71.3%	65.3%	82.0%	77.2%	--



AVERAGE AGE  
(> 15 years old)



#### % OF TOURISTS WITH INCOMES OVER €74,999



#### % OF TOURISTS TRAVEL ONLY WITH PARTNER

