

## Tourist profile trend (2015)

### Canary Islands: Irish



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



	2011	2012	2013	2014	2015
Tourist arrivals (> 16 years old)	364,325	343,692	352,416	388,439	389,702
Average daily expenditure (€)	113.92	118.46	117.38	122.69	122.90
. in their place of residence	59.80	64.27	65.04	68.40	71.02
. in the Canary Islands	54.12	54.19	52.34	54.30	51.88
Average length of stay	8.69	9.31	9.26	9.45	9.20
Turnover per tourist (€)	920	1,002	990	1,025	1,023
Total turnover (> 16 years old) (€m)	364	376	403	433	399
Year on year variation of turnover	--	3.2%	7.3%	7.3%	-7.9%
Year on year variation of tourist	--	-5.7%	2.5%	10.2%	0.3%

#### Expenditure in the Canary Islands per tourist and trip (€)

<b>Accommodation (*)</b> :	51.97	72.24	54.35	73.85	67.04
- Accommodation	45.87	66.99	50.39	68.58	62.50
- Additional accommodation expenses	6.10	5.24	3.95	5.26	4.54
<b>Transport:</b>	29.70	31.38	28.13	27.31	29.66
- Public transport	5.42	8.04	7.65	6.75	8.20
- Taxi	16.90	14.33	11.74	12.61	13.92
- Car rental	7.38	9.02	8.74	7.95	7.54
<b>Food and drink:</b>	226.02	238.33	236.41	241.95	225.61
- Food purchases at supermarkets	96.76	99.80	108.36	110.66	96.87
- Restaurants	129.26	138.54	128.06	131.29	128.74
<b>Souvenirs:</b>	48.84	53.66	58.56	54.35	48.63
<b>Leisure:</b>	55.83	49.54	48.61	42.17	46.44
- Organized excursions	13.48	10.56	13.35	13.32	13.62
- Leisure, amusement	6.16	5.15	6.21	4.44	5.74
- Trip to other islands	1.64	1.64	2.64	1.28	1.61
- Sporting activities	5.72	2.83	6.32	4.92	5.75
- Cultural activities	0.89	1.54	2.01	1.39	2.00
- Discos and disco-pubs	27.94	27.82	18.08	16.82	17.72
<b>Others:</b>	28.28	24.47	20.05	16.30	19.89
- Wellness	3.67	4.43	4.51	2.82	4.09
- Medical expenses	4.26	4.29	3.09	3.66	3.18
- Other expenses	20.36	15.76	12.46	9.83	12.62

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



	2011	2012	2013	2014	2015
The same day they leave	0.3%	0.5%	0.4%	0.7%	0.5%
Between 2 and 7 days	8.7%	5.8%	5.6%	6.2%	4.9%
Between 8 and 15 days	10.2%	7.4%	8.2%	8.4%	7.3%
Between 16 and 30 days	15.1%	15.7%	16.7%	16.1%	16.2%
Between 31 and 90 days	38.9%	38.5%	37.9%	33.3%	33.7%
More than 90 days	26.8%	32.1%	31.2%	35.2%	37.4%

#### What do they book at their place of residence?



	2011	2012	2013	2014	2015
Flight only	18.1%	17.4%	11.6%	11.3%	12.9%
Flight and accommodation (room only)	58.1%	55.9%	59.3%	58.3%	55.2%
Flight and accommodation (B&B)	6.2%	7.8%	8.0%	7.9%	9.8%
Flight and accommodation (half board)	8.9%	7.8%	10.0%	10.5%	8.4%
Flight and accommodation (full board)	1.1%	1.4%	2.0%	1.6%	2.9%
Flight and accommodation (all inclusive)	7.6%	9.6%	9.1%	10.4%	10.7%
<b>% Tourists using low-cost airlines</b>	63.7%	56.5%	70.0%	66.9%	71.6%
<b>Other expenses in their place of residence:</b>					
- Car rental	3.4%	4.5%	4.3%	2.8%	4.2%
- Sporting activities	2.2%	3.4%	1.8%	1.4%	2.7%
- Excursions	1.2%	1.5%	2.4%	3.0%	4.0%
- Combined trip to other islands	0.2%	0.3%	0.3%	0.5%	0.9%

#### How do they book?



	2011	2012	2013	2014	2015
<b>Accommodation booking</b>					
<b>Tour Operator</b>	29.5%	27.0%	30.1%	27.6%	23.3%
- Tour Operator's website	78.3%	73.6%	79.6%	76.6%	80.6%
<b>Accommodation</b>	33.2%	36.3%	31.4%	33.2%	35.9%
- Accommodation's website	88.2%	87.0%	91.8%	84.2%	89.3%
<b>Travel agency (High street)</b>	8.1%	9.7%	10.7%	12.5%	9.7%
<b>Online Travel Agency (OTA)</b>	18.0%	17.9%	20.2%	19.6%	22.3%
<b>No need to book accommodation</b>	11.1%	9.1%	7.7%	7.2%	8.8%

	2011	2012	2013	2014	2015
<b>Flight booking</b>					
<b>Tour Operator</b>	39.2%	30.0%	29.1%	28.5%	25.7%
- Tour Operator's website	75.5%	70.9%	79.0%	73.2%	84.1%
<b>Airline</b>	49.4%	55.1%	54.4%	53.5%	59.4%
- Airline's website	98.8%	98.3%	98.8%	99.0%	98.9%
<b>Travel agency (High street)</b>	5.9%	8.5%	9.0%	10.5%	7.7%
<b>Online Travel Agency (OTA)</b>	5.5%	6.5%	7.5%	7.4%	7.2%

#### Where do they stay?



	2011	2012	2013	2014	2015
<b>5* Hotel</b>	3.6%	4.6%	3.6%	4.4%	3.8%
<b>4* Hotel</b>	17.6%	18.5%	17.5%	18.4%	19.3%
<b>1-2-3* Hotel</b>	8.6%	9.5%	8.7%	8.0%	10.6%
<b>Apartment</b>	60.1%	58.1%	62.7%	61.7%	57.1%
<b>Property (privately-owned, friends, family)</b>	8.1%	8.4%	7.2%	6.5%	7.4%
<b>Others</b>	2.0%	0.9%	0.4%	0.9%	1.8%

#### How are they?



	2011	2012	2013	2014	2015
<b>Gender</b>					
Percentage of men	52.5%	52.1%	50.9%	51.8%	46.0%
Percentage of women	47.5%	47.9%	49.1%	48.2%	54.0%

	2011	2012	2013	2014	2015
<b>Age</b>					
Average age (tourists > 16 years old)	41.5	42.7	42.7	43.6	44.5
Standard deviation	13.8	14.5	14.7	14.7	15.0

	2011	2012	2013	2014	2015
<b>Age range</b>					
16-24 years old	8.9%	8.1%	8.5%	8.9%	9.0%
25-30 years old	17.2%	16.0%	15.0%	15.5%	12.4%
31-45 years old	38.1%	38.2%	38.4%	33.1%	33.7%
46-60 years old	24.4%	22.8%	23.4%	26.3%	27.6%
Over 60 years old	11.4%	14.8%	14.7%	16.3%	17.3%

	2011	2012	2013	2014	2015
<b>Occupation</b>					
Business owner or self-employed	33.3%	31.3%	32.6%	33.8%	30.8%
Upper/Middle management employee	27.4%	24.2%	24.6%	25.2%	26.3%
Auxiliary level employee	19.5%	18.8%	18.6%	16.6%	16.0%
Students	3.9%	5.1%	6.0%	4.6%	5.1%
Retired	11.1%	15.9%	14.5%	15.5%	16.7%
Unemployed / unpaid dom. work	4.9%	4.7%	3.7%	4.4%	5.1%

	2011	2012	2013	2014	2015
<b>Annual household income level</b>					
€12,000 - €24,000	14.2%	12.3%	14.2%	16.1%	13.4%
€24,001 - €36,000	18.6%	21.7%	19.9%	19.1%	20.2%
€36,001 - €48,000	17.2%	19.8%	18.5%	18.5%	18.9%
€48,001 - €60,000	16.9%	15.2%	16.8%	14.9%	14.2%
€60,001 - €72,000	9.9%	10.3%	10.6%	9.4%	10.8%
€72,001 - €84,000	9.4%	5.7%	6.5%	7.9%	5.9%
More than €84,000	13.8%	15.1%	13.6%	14.2%	16.5%

(\*) Bear in mind that 87% of Irish tourists in 2015 paid the accommodation before travelling.

## Tourist profile trend (2015)

### Canary Islands: Irish



#### Which island do they choose?



Tourists (> 16 years old)	2011	2012	2013	2014	2015
- Lanzarote	171,799	158,157	154,030	206,689	199,272
- Fuerteventura	37,518	39,228	45,342	31,854	36,409
- Gran Canaria	69,297	73,844	65,991	73,769	64,429
- Tenerife	84,519	71,987	86,228	75,922	88,189
- La Palma	109	105	23	0	14

Share (%)	2011	2012	2013	2014	2015
- Lanzarote	47.3%	46.1%	43.8%	53.2%	51.3%
- Fuerteventura	10.3%	11.4%	12.9%	8.2%	9.4%
- Gran Canaria	19.1%	21.5%	18.8%	19.0%	16.6%
- Tenerife	23.3%	21.0%	24.5%	19.6%	22.7%
- La Palma	0.0%	0.0%	0.0%	0.0%	0.0%

#### Who do they come with?



#### Why do they choose the Canary Islands?



	2011	2012	2013	2014	2015
Unaccompanied	7.1%	5.8%	5.3%	5.5%	8.9%
Only with partner	49.1%	52.6%	51.4%	50.0%	47.3%
Only with children (under the age of 13)	1.6%	1.3%	0.5%	1.6%	1.7%
Partner + children (under the age of 13)	11.3%	13.4%	11.6%	14.1%	11.6%
Other relatives	7.3%	7.8%	8.0%	8.1%	8.3%
Friends	9.5%	6.9%	7.8%	7.8%	6.4%
Work colleagues	0.1%	0.4%	0.2%	0.3%	0.2%

Aspects influencing the choice	2011	2012	2013	2014	2015
Climate/sun	90.2%	90.9%	90.0%	90.1%	89.3%
Tranquillity/rest/relaxation	41.5%	41.1%	39.0%	39.0%	37.9%
Beaches	33.6%	33.7%	34.1%	34.3%	33.6%
Scenery	21.6%	20.1%	20.4%	21.3%	22.6%
Price	15.2%	15.3%	14.3%	15.1%	14.1%
Visiting new places	14.9%	15.0%	14.1%	14.4%	14.1%
Ease of travel	9.1%	9.1%	8.7%	8.4%	8.3%
Suitable destination for children	7.8%	7.8%	8.0%	8.6%	7.7%
Security	5.6%	5.0%	5.2%	5.1%	7.5%
Quality of the environment	6.5%	6.1%	6.5%	6.0%	6.4%
Active tourism	3.9%	4.2%	4.7%	4.9%	5.2%
Nightlife/fun	5.2%	5.4%	5.1%	4.4%	4.3%
Theme parks	2.5%	2.7%	2.6%	2.7%	3.1%
Shopping	3.2%	3.2%	2.8%	3.0%	3.0%
Culture	2.4%	2.4%	2.6%	2.5%	2.7%
Nautical activities	2.0%	2.0%	2.3%	2.3%	2.1%

\* Multi-choice question

#### How do they value the destination?



Impression of their stay	2011	2012	2013	2014	2015
Good or very good (% tourists)	93.5%	94.4%	93.9%	94.0%	95.2%
Average rating (scale 1-10)	9.00	9.07	8.98	9.06	9.06

#### How many are loyal to the destination?

Percentage of repeat tourists	2011	2012	2013	2014	2015
Repeat tourists	87.9%	87.4%	87.6%	86.0%	88.7%
In love (more than 10 visits)	16.0%	20.6%	17.7%	17.5%	19.9%

#### What did motivate them to come?



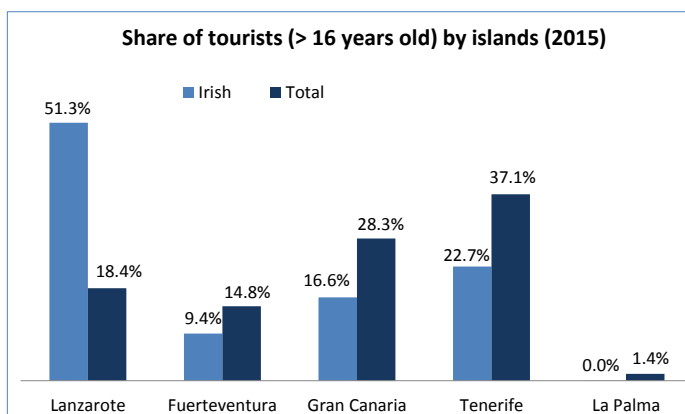
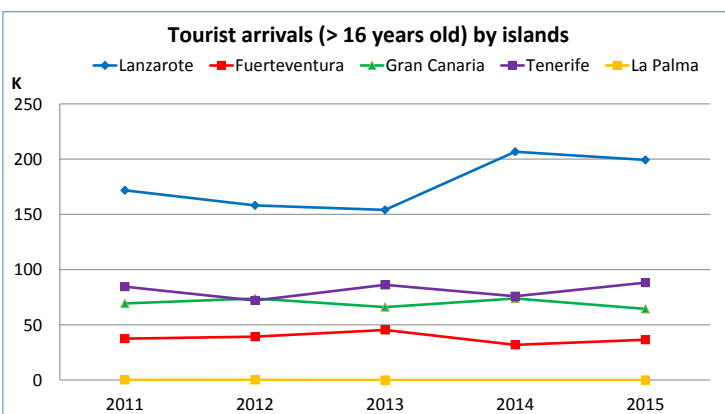
Aspects motivating the choice	2011	2012	2013	2014	2015
Previous visits to the Canary Islands	75.9%	76.2%	73.3%	74.7%	76.7%
Recommendation by friends or relatives	47.5%	43.6%	45.5%	48.8%	45.2%
The Canary Islands television channel	0.3%	0.2%	0.2%	0.2%	0.5%
Other television or radio channels	0.8%	0.2%	0.2%	0.2%	0.6%
Information in the press/magazines/books	1.9%	2.4%	1.7%	2.4%	1.8%
Attendance at a tourism fair	0.4%	0.4%	0.4%	0.2%	0.8%
Tour Operator's brochure or catalogue	6.1%	5.9%	4.8%	5.9%	5.2%
Recommendation by Travel Agency	7.6%	6.1%	6.6%	6.3%	4.6%
Information obtained via the Internet	20.2%	21.8%	22.7%	19.9%	19.2%
Senior Tourism programme	0.0%	0.1%	0.3%	0.0%	0.2%
Others	4.6%	3.3%	3.7%	3.6%	2.9%

\* Multi-choice question

#### Where does the flight come from?



Ten main origin countries	2011	2012	2013	2014	2015
Ireland	340,036	325,577	346,194	377,965	370,215
United Kingdom	21,284	14,518	4,740	7,987	12,734
Spain	1,556	800	413	2,155	3,555
Germany	671	375	865	332	1,292
Czech Republic	0	0	0	0	862
Poland	0	0	0	0	496
Belgium	139	0	0	0	285
Others	509	738	0	0	250
Netherlands	130	281	23	0	14
Italy	0	1,404	181	0	0



Source: ISTAC (Encuesta sobre el Gasto Turístico).

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