

Tourist profile trend (2016)

Canary Islands: Irish market



How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	313,022	343,999	349,936	376,302	409,773
Average daily expenditure (€)	122.75	120.62	127.03	128.74	133.38
- in their place of residence	68.33	67.96	73.07	75.82	78.53
- in the Canary Islands	54.42	52.66	53.96	52.92	54.85
Average length of stay	9.34	9.38	9.41	9.05	8.98
Turnover per tourist (€)	1,039	1,031	1,060	1,065	1,098
Total turnover (> 16 years old) (€m)	325	355	371	401	450
Irish turnover: year on year change	--	9.1%	4.5%	8.0%	12.3%
Irish tourist arrivals: year on year change	--	9.9%	1.7%	7.5%	8.9%

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

Accommodation (**):	74.14	56.12	74.48	73.80	89.52
- Accommodation	66.86	52.14	68.19	68.52	84.23
- Additional accommodation expenses	7.28	3.98	6.29	5.28	5.29
Transport:	32.48	28.29	27.96	28.68	29.15
- Public transport	8.80	7.92	6.29	7.37	7.94
- Taxi	14.97	12.17	13.03	13.43	14.64
- Car rental	8.70	8.20	8.64	7.88	6.57
Food and drink:	234.11	239.44	233.87	224.28	223.72
- Food purchases at supermarkets	94.23	106.48	103.17	93.00	95.09
- Restaurants	139.89	132.95	130.70	131.28	128.64
Souvenirs:	60.47	60.38	56.50	49.19	56.60
Leisure:	49.06	50.99	40.40	44.52	41.72
- Organized excursions	11.18	14.10	12.55	13.60	13.67
- Leisure, amusement	4.57	7.54	4.22	5.10	5.79
- Trip to other islands	1.77	2.08	1.11	1.50	0.90
- Sporting activities	2.55	6.54	5.28	5.57	4.67
- Cultural activities	1.51	1.55	1.57	1.69	1.63
- Discos and disco-pubs	27.48	19.17	15.67	17.06	15.06
Others:	24.91	24.25	16.29	19.74	16.95
- Wellness	5.06	5.14	3.25	4.64	4.93
- Medical expenses	3.97	3.89	3.15	3.14	3.34
- Other expenses	15.87	15.23	9.89	11.95	8.68

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.5%	0.5%	0.8%	0.3%	0.7%
Between 2 and 7 days	5.6%	6.2%	5.6%	4.2%	3.7%
Between 8 and 15 days	6.9%	8.3%	7.2%	8.4%	5.9%
Between 16 and 30 days	16.9%	17.6%	16.8%	15.9%	13.6%
Between 31 and 90 days	39.7%	36.4%	34.8%	34.7%	36.0%
More than 90 days	30.3%	31.0%	34.7%	36.5%	40.1%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	15.6%	12.1%	10.6%	9.6%	7.8%
Flight and accommodation (room only)	51.4%	54.7%	51.6%	52.3%	54.7%
Flight and accommodation (B&B)	9.6%	9.7%	10.0%	12.0%	10.5%
Flight and accommodation (half board)	10.3%	11.9%	12.8%	11.1%	12.6%
Flight and accommodation (full board)	1.8%	2.2%	2.3%	3.0%	2.1%
Flight and accommodation (all inclusive)	11.2%	9.4%	12.7%	12.0%	12.3%
% Tourists using low-cost airlines	53.5%	64.8%	64.6%	70.7%	72.4%
Other expenses in their place of residence:					
- Car rental	4.1%	3.5%	3.1%	4.4%	3.0%
- Sporting activities	2.8%	1.8%	1.8%	2.7%	2.8%
- Excursions	1.3%	2.0%	3.0%	3.8%	2.0%
- Trip to other islands	0.2%	0.3%	0.5%	0.8%	0.5%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	28.6%	29.5%	27.2%	25.1%	26.8%
- Tour Operator's website	72.6%	80.1%	78.7%	78.5%	83.9%
Accommodation	35.6%	31.2%	34.0%	35.7%	36.4%
- Accommodation's website	89.2%	90.4%	84.3%	88.8%	87.0%
Travel agency (High street)	10.7%	11.2%	13.5%	10.5%	10.6%
Online Travel Agency (OTA)	18.0%	19.8%	18.9%	22.8%	21.4%
No need to book accommodation	7.1%	8.3%	6.4%	5.9%	4.7%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	31.0%	28.0%	27.2%	27.3%	26.0%
- Tour Operator's website	70.1%	80.5%	74.5%	82.0%	80.6%
Airline	52.2%	54.0%	53.6%	55.8%	57.8%
- Airline's website	98.3%	98.9%	98.8%	98.9%	97.7%
Travel agency (High street)	9.3%	9.9%	11.7%	8.9%	9.1%
Online Travel Agency (OTA)	7.5%	8.1%	7.5%	8.0%	7.1%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	6.5%	5.1%	6.9%	5.5%	4.1%
4* Hotel	25.9%	24.0%	26.3%	25.9%	27.4%
1-2-3* Hotel	11.9%	11.1%	11.0%	15.0%	10.4%
Apartment	48.0%	51.0%	48.6%	47.3%	54.0%
Property (privately-owned, friends, family)	7.0%	8.4%	6.0%	5.1%	3.4%
Others	0.7%	0.3%	1.2%	1.2%	0.7%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	51.8%	52.3%	50.6%	47.3%	45.7%
Percentage of women	48.2%	47.7%	49.4%	52.7%	54.3%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	44.0	42.8	44.3	44.8	46.7
Standard deviation	14.2	14.4	14.4	14.7	14.9

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	8.4%	9.4%	8.7%	9.1%	7.3%
25-30 years old	12.8%	14.1%	14.2%	11.5%	9.6%
31-45 years old	33.4%	35.4%	30.2%	31.3%	30.5%
46-60 years old	31.2%	27.6%	31.7%	31.8%	31.8%
Over 60 years old	14.3%	13.5%	15.2%	16.3%	20.8%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	31.8%	32.8%	34.7%	31.9%	27.8%
Upper/Middle management employee	24.8%	25.5%	26.8%	26.7%	26.9%
Auxiliary level employee	18.0%	18.1%	16.0%	15.9%	17.0%
Students	4.6%	6.5%	4.4%	5.3%	4.7%
Retired	16.3%	13.3%	13.9%	15.6%	19.9%
Unemployed / unpaid dom. work	4.5%	3.9%	4.2%	4.6%	3.8%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	11.2%	13.0%	13.5%	12.7%	10.3%
€24,001 - €36,000	22.3%	20.3%	18.6%	18.9%	16.4%
€36,001 - €48,000	19.2%	17.6%	18.0%	19.1%	18.0%
€48,001 - €60,000	14.6%	16.5%	15.3%	13.9%	16.7%
€60,001 - €72,000	10.4%	10.4%	9.8%	10.8%	11.8%
€72,001 - €84,000	5.6%	6.7%	8.0%	6.5%	8.6%
More than €84,000	16.6%	15.6%	16.9%	18.2%	18.1%

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Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	163,716	172,428	172,533	188,889	203,112
- Fuerteventura	23,748	22,568	28,141	32,278	30,397
- Gran Canaria	49,057	53,590	52,884	53,435	61,305
- Tenerife	76,222	93,631	96,095	100,134	113,317
- La Palma	67	50	0	184	0

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	52.3%	50.4%	49.3%	50.4%	49.8%
- Fuerteventura	7.6%	6.6%	8.0%	8.6%	7.4%
- Gran Canaria	15.7%	15.7%	15.1%	14.3%	15.0%
- Tenerife	24.4%	27.4%	27.5%	26.7%	27.8%
- La Palma	0.0%	0.0%	0.0%	0.0%	0.0%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	5.3%	5.7%	5.8%	7.7%	6.0%
Only with partner	56.0%	55.3%	52.7%	49.8%	44.5%
Only with children (under the age of 13)	1.0%	0.5%	1.7%	1.6%	1.3%
Partner + children (under the age of 13)	12.3%	10.3%	13.5%	10.9%	15.0%
Other relatives	7.1%	7.8%	8.2%	8.2%	9.7%
Friends	6.1%	7.1%	6.1%	6.8%	7.0%
Work colleagues	0.5%	0.2%	0.3%	0.3%	0.2%
Other combinations ⁽¹⁾	11.6%	13.0%	11.7%	14.6%	16.3%

* Multi-choice question (different situations have been isolated)

How do they rate the destination?

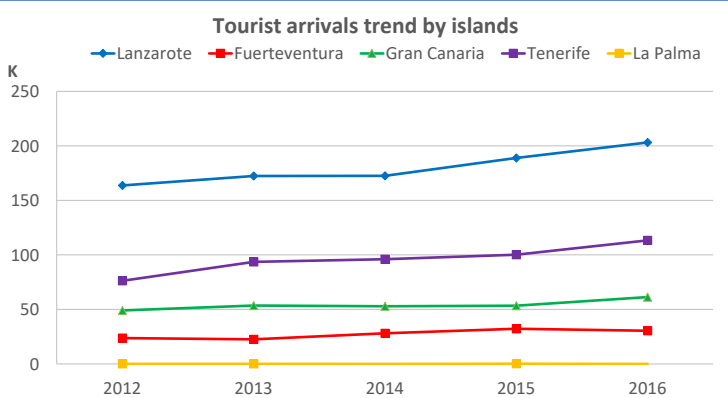
Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	94.5%	94.0%	95.1%	95.1%	95.3%
Average rating (scale 1-10)	9.07	9.00	9.11	9.05	9.19

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	87.1%	88.4%	86.1%	88.2%	88.8%
In love (at least 10 previous visits)	21.0%	20.2%	17.6%	20.0%	23.7%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
Ireland	298,089	337,745	338,493	358,204	394,050
United Kingdom	11,551	5,219	9,236	11,256	12,133
Spanish Mainland	740	203	1,938	3,475	3,153
Netherlands	395	50	0	184	309
Italy	1,522	218	0	0	127
Germany	60	564	269	1,345	0
Belgium	0	0	0	338	0
Poland	0	0	0	352	0
Czech Republic	0	0	0	788	0
Austria	0	0	0	0	0



Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

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

Why do they choose the Canary Islands?

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	94.2%	95.5%	93.5%	93.3%	93.4%
Tranquillity/rest/relaxation	38.0%	37.9%	35.8%	34.6%	34.1%
Beaches	29.3%	30.4%	32.2%	31.4%	28.8%
Price	21.9%	25.6%	22.5%	23.1%	18.8%
Ease of travel	14.6%	14.4%	11.6%	12.4%	13.3%
Scenery	8.3%	10.7%	9.5%	12.8%	11.2%
Security	6.8%	5.4%	6.8%	5.9%	11.1%
Suitable destination for children	10.1%	7.6%	10.8%	9.9%	10.8%
Nightlife/fun	13.0%	11.8%	9.9%	9.6%	9.7%
Visiting new places	9.6%	7.5%	8.3%	7.6%	7.9%
Quality of the environment	6.1%	6.7%	6.6%	5.2%	6.9%
Shopping	5.0%	4.6%	5.4%	5.5%	6.2%
Theme parks	1.7%	2.5%	3.5%	4.0%	3.9%
Active tourism	1.1%	3.0%	2.9%	3.4%	3.3%
Culture	1.6%	1.9%	3.1%	3.1%	2.4%
Security against natural catastrophes	0.4%	0.2%	0.2%	0.2%	1.4%

* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	76.2%	74.3%	73.6%	75.9%	76.0%
Recommendation by friends or relatives	42.5%	45.3%	46.2%	43.5%	44.8%
The Canary Islands television channel	0.2%	0.3%	0.3%	0.5%	0.2%
Other television or radio channels	0.2%	0.3%	0.2%	0.5%	0.4%
Information in the press/magazines/books	2.0%	2.1%	2.0%	2.3%	1.8%
Attendance at a tourism fair	0.4%	0.4%	0.2%	0.6%	0.1%
Tour Operator's brochure or catalogue	7.0%	5.2%	5.6%	4.9%	3.8%
Recommendation by Travel Agency	6.4%	6.6%	6.8%	5.5%	5.8%
Information obtained via the Internet	21.2%	22.4%	21.2%	19.2%	20.8%
Senior Tourism programme	0.1%	0.3%	0.0%	0.2%	0.2%
Others	2.9%	4.1%	3.6%	3.2%	3.5%

* Multi-choice question

