

Tourist profile trend (2017)

IRELAND

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	401,848	413,992	442,852	482,132	531,907
Tourist arrivals (> 16 years old)	343,999	349,936	376,302	409,773	441,059
Average daily expenditure (€)	120.62	127.03	128.74	133.38	137.26
. in their place of residence	67.96	73.07	75.82	78.53	83.01
. in the Canary Islands	52.66	53.96	52.92	54.85	54.25
Average length of stay	9.38	9.41	9.05	8.98	8.92
Turnover per tourist (€)	1,031	1,060	1,065	1,098	1,135
Total turnover (€m)	414	439	471	529	604
Tourist arrivals: year on year change	--	3.0%	7.0%	8.9%	10.3%
Turnover: year on year change	--	5.9%	7.5%	12.2%	14.1%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	25.8%	26.6%	25.3%	29.7%	26.5%
- Additional accommodation expenses	6.1%	7.6%	5.2%	5.4%	6.1%
Transport:					
- Public transport	23.3%	20.2%	22.4%	23.5%	23.0%
- Taxi	40.9%	45.5%	44.1%	46.2%	45.0%
- Car rental	11.5%	9.5%	12.0%	9.9%	10.3%
Food and drink:					
- Food purchases at supermarkets	77.8%	73.5%	71.3%	75.2%	72.9%
- Restaurants	65.9%	65.1%	64.2%	64.6%	65.0%
Souvenirs:	61.2%	60.2%	55.7%	60.4%	57.7%
Leisure:					
- Organized excursions	20.2%	17.8%	18.5%	18.7%	16.1%
- Leisure, amusement	9.1%	9.3%	10.3%	11.2%	9.2%
- Trip to other islands	3.3%	2.1%	2.3%	1.8%	2.3%
- Sporting activities	8.4%	7.1%	9.1%	8.7%	6.8%
- Cultural activities	2.4%	3.7%	3.7%	3.3%	2.9%
- Discos and disco-pubs	18.6%	12.5%	15.5%	13.3%	11.3%
Others:					
- Wellness	9.1%	7.0%	7.1%	8.0%	8.3%
- Medical expenses	9.8%	9.7%	8.8%	11.9%	9.6%
- Other expenses	12.8%	13.5%	10.6%	9.6%	10.5%

2017



+10%
TOURISTS
531,907



+3%
TRAVEL EXPENSES
€1,099



+14%
TURNOVER
€604 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	12.1%	10.6%	9.6%	7.8%	7.2%
Flight and accommodation (room only)	54.7%	51.6%	52.3%	54.7%	53.0%
Flight and accommodation (B&B)	9.7%	10.0%	12.0%	10.5%	10.0%
Flight and accommodation (half board)	11.9%	12.8%	11.1%	12.6%	15.9%
Flight and accommodation (full board)	2.2%	2.3%	3.0%	2.1%	2.4%
Flight and accommodation (all inclusive)	9.4%	12.7%	12.0%	12.3%	11.4%
<u>% Tourists using low-cost airlines</u>					
	64.8%	64.6%	70.7%	72.4%	68.7%
<u>Other expenses in their place of residence:</u>					
- Car rental	3.5%	3.1%	4.4%	3.0%	4.2%
- Sporting activities	1.8%	1.8%	2.7%	2.8%	2.9%
- Excursions	2.0%	3.0%	3.8%	2.0%	2.2%
- Trip to other islands	0.3%	0.5%	0.8%	0.5%	0.8%

How do they book?



	2013	2014	2015	2016	2017
<u>Accommodation booking</u>					
Tour Operator	29.5%	27.2%	25.1%	26.8%	24.7%
- Tour Operator's website	80.1%	78.7%	78.5%	83.9%	79.6%
Accommodation	31.2%	34.0%	35.7%	36.4%	32.1%
- Accommodation's website	90.4%	84.3%	88.8%	87.0%	90.2%
Travel agency (High street)	11.2%	13.5%	10.5%	10.6%	13.3%
Online Travel Agency (OTA)	19.8%	18.9%	22.8%	21.4%	24.5%
No need to book accommodation	8.3%	6.4%	5.9%	4.7%	5.4%
<u>Flight booking</u>					
Tour Operator	28.0%	27.2%	27.3%	26.0%	23.2%
- Tour Operator's website	80.5%	74.5%	82.0%	80.6%	78.9%
Airline	54.0%	53.6%	55.8%	57.8%	54.5%
- Airline's website	98.9%	98.8%	98.9%	97.7%	99.2%
Travel agency (High street)	9.9%	11.7%	8.9%	9.1%	12.8%
Online Travel Agency (OTA)	8.1%	7.5%	8.0%	7.1%	9.6%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.5%	0.8%	0.3%	0.7%	0.7%
Between 2 and 7 days	6.2%	5.6%	4.2%	3.7%	5.2%
Between 8 and 15 days	8.3%	7.2%	8.4%	5.9%	5.3%
Between 16 and 30 days	17.6%	16.8%	15.9%	13.6%	10.2%
Between 31 and 90 days	36.4%	34.8%	34.7%	36.0%	37.3%
More than 90 days	31.0%	34.7%	36.5%	40.1%	41.3%

Who are they?



	2013	2014	2015	2016	2017
<u>Gender</u>					
Men	52.3%	50.6%	47.3%	45.7%	47.6%
Women	47.7%	49.4%	52.7%	54.3%	52.4%
<u>Age</u>					
Average age (tourists > 16 years old)	42.8	44.3	44.8	46.7	47.7
Standard deviation	14.4	14.4	14.7	14.9	15.7
<u>Age range (> 16 years old)</u>					
16-24 years old	9.4%	8.7%	9.1%	7.3%	8.7%
25-30 years old	14.1%	14.2%	11.5%	9.6%	8.3%
31-45 years old	35.4%	30.2%	31.3%	30.5%	28.3%
46-60 years old	27.6%	31.7%	31.8%	31.8%	29.9%
Over 60 years old	13.5%	15.2%	16.3%	20.8%	24.8%
<u>Occupation</u>					
Business owner or self-employed	32.8%	34.7%	31.9%	27.8%	29.6%
Upper/Middle management employee	25.5%	26.8%	26.7%	26.9%	23.8%
Auxiliary level employee	18.1%	16.0%	15.9%	17.0%	17.9%
Students	6.5%	4.4%	5.3%	4.7%	4.0%
Retired	13.3%	13.9%	15.6%	19.9%	20.5%
Unemployed / unpaid dom. work	3.9%	4.2%	4.6%	3.8%	4.1%
<u>Annual household income level</u>					
€12,000 - €24,000	13.0%	13.5%	12.7%	10.3%	11.2%
€24,001 - €36,000	20.3%	18.6%	18.9%	16.4%	16.9%
€36,001 - €48,000	17.6%	18.0%	19.1%	18.0%	16.6%
€48,001 - €60,000	16.5%	15.3%	13.9%	16.7%	16.6%
€60,001 - €72,000	10.4%	9.8%	10.8%	11.8%	10.7%
€72,001 - €84,000	6.7%	8.0%	6.5%	8.6%	8.0%
More than €84,000	15.6%	16.9%	18.2%	18.1%	19.9%

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IRELAND

Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	172,428	172,533	188,889	203,112	217,687
- Fuerteventura	22,568	28,141	32,278	30,397	31,592
- Gran Canaria	53,590	52,884	53,435	61,305	72,349
- Tenerife	93,631	96,095	100,134	113,317	118,393
- La Palma	50	0	184	0	260

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	50.4%	49.3%	50.4%	49.8%	49.4%
- Fuerteventura	6.6%	8.0%	8.6%	7.4%	7.2%
- Gran Canaria	15.7%	15.1%	14.3%	15.0%	16.4%
- Tenerife	27.4%	27.5%	26.7%	27.8%	26.9%
- La Palma	0.0%	0.0%	0.0%	0.0%	0.1%

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	5.1%	6.9%	5.5%	4.1%	4.8%
4* Hotel	24.0%	26.3%	25.9%	27.4%	27.5%
1-2-3* Hotel	11.1%	11.0%	15.0%	10.4%	10.1%
Apartment	51.0%	48.6%	47.3%	54.0%	52.6%
Property (privately-owned, friends, family)	8.4%	6.0%	5.1%	3.4%	3.0%
Others	0.3%	1.2%	1.2%	0.7%	1.9%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	95.5%	93.5%	93.3%	93.4%	94.0%
Tranquillity/rest/relaxation	37.9%	35.8%	34.6%	34.1%	35.2%
Beaches	30.4%	32.2%	31.4%	28.8%	33.1%
Price	25.6%	22.5%	23.1%	18.8%	18.7%
Scenery	10.7%	9.5%	12.8%	11.2%	12.6%
Ease of travel	14.4%	11.6%	12.4%	13.3%	11.8%
Security	5.4%	6.8%	5.9%	11.1%	10.4%
Suitable destination for children	7.6%	10.8%	9.9%	10.8%	9.8%
Quality of the environment	6.7%	6.6%	5.2%	6.9%	8.2%
Nightlife/fun	11.8%	9.9%	9.6%	9.7%	7.9%
Visiting new places	7.5%	8.3%	7.6%	7.9%	7.1%
Shopping	4.6%	5.4%	5.5%	6.2%	5.0%
Theme parks	2.5%	3.5%	4.0%	3.9%	4.1%
Active tourism	3.0%	2.9%	3.4%	3.3%	3.1%
Culture	1.9%	3.1%	3.1%	2.4%	2.4%
Golf	1.4%	1.6%	1.3%	1.0%	0.9%

* Multi-choose question

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	5.7%	5.8%	7.7%	6.0%	6.5%
Only with partner	55.3%	52.7%	49.8%	44.5%	48.7%
Only with children (under the age of 13)	0.5%	1.7%	1.6%	1.3%	1.3%
Partner + children (under the age of 13)	10.3%	13.5%	10.9%	15.0%	12.5%
Other relatives	7.8%	8.2%	8.2%	9.7%	9.4%
Friends	7.1%	6.1%	6.8%	7.0%	5.4%
Work colleagues	0.2%	0.3%	0.3%	0.2%	0.1%
Other combinations ⁽¹⁾	13.0%	11.7%	14.6%	16.3%	16.0%

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

How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	94.0%	95.1%	95.1%	95.3%	95.1%
Average rating (scale 1-10)	9.00	9.11	9.05	9.19	9.16

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	88.4%	86.1%	88.2%	88.8%	89.0%
At least 10 previous visits	20.2%	17.6%	20.0%	23.7%	23.9%

Where does the flight come from?

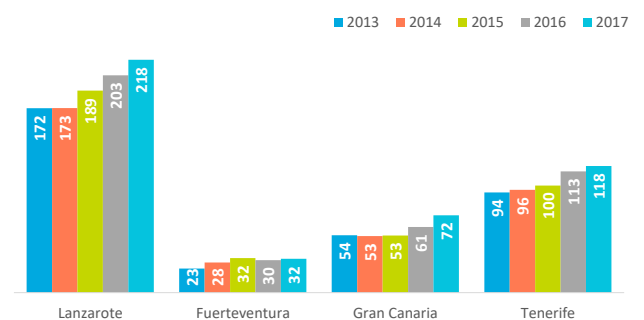
Tourists (> 16 years old)	2013	2014	2015	2016	2017
Ireland	98.2%	96.7%	95.2%	96.2%	94.4%
United Kingdom	1.5%	2.6%	3.0%	3.0%	4.4%
Spanish Mainland	0.1%	0.6%	0.9%	0.8%	0.7%
Germany	0.2%	0.1%	0.4%	0.0%	0.2%
Poland	0.0%	0.0%	0.1%	0.0%	0.2%
Italy	0.1%	0.0%	0.0%	0.0%	0.1%
Norway	0.0%	0.0%	0.0%	0.0%	0.1%
Netherlands	0.0%	0.0%	0.0%	0.1%	0.0%
Belgium	0.0%	0.0%	0.1%	0.0%	0.0%
Others	0.0%	0.0%	0.3%	0.0%	0.0%

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	74.3%	73.6%	75.9%	76.0%	78.1%
Recommendation by friends/relatives	45.3%	46.2%	43.5%	44.8%	41.4%
The Canary Islands television channel	0.3%	0.3%	0.5%	0.2%	0.1%
Other television or radio channels	0.3%	0.2%	0.5%	0.4%	0.8%
Information in press/magazines/books	2.1%	2.0%	2.3%	1.8%	2.0%
Attendance at a tourism fair	0.4%	0.2%	0.6%	0.1%	0.2%
Tour Operator's brochure or catalogue	5.2%	5.6%	4.9%	3.8%	4.0%
Recommendation by Travel Agency	6.6%	6.8%	5.5%	5.8%	6.0%
Information obtained via the Internet	22.4%	21.2%	19.2%	20.8%	19.1%
Senior Tourism programme	0.3%	0.0%	0.2%	0.2%	0.1%
Others	4.1%	3.6%	3.2%	3.5%	3.3%

* Multi-choose question

Tourist arrivals by islands (thousands)



Tourists over 16 years old.

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.