

Tourist profile trend (2016)

Ireland: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	77,664	74,169	71,828	89,269	97,821
Average daily expenditure (€)	123.63	130.69	134.70	138.39	139.07
. in their place of residence	69.52	75.19	76.73	82.72	83.16
. in the Canary Islands	54.11	55.50	57.97	55.68	55.91
Average length of stay	9.69	8.84	9.08	9.07	8.66
Turnover per tourist (€)	1,039	1,099	1,034	1,175	1,130
Total turnover (> 16 years old) (€m)	80.7	81.5	74.3	105	111
Share of total turnover	24.8%	23.0%	20.0%	26.2%	24.6%
Share of total tourist	24.8%	21.6%	20.5%	23.7%	23.9%

Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	80.20	55.69	65.98	93.26	96.18
- Accommodation	66.79	51.41	61.77	88.93	91.00
- Additional accommodation expenses	13.41	4.28	4.21	4.33	5.18
Transport:	41.14	28.45	33.07	31.35	30.72
- Public transport	14.79	10.32	5.78	9.92	8.07
- Taxi	14.02	10.85	13.79	13.01	16.78
- Car rental	12.33	7.28	13.49	8.42	5.86
Food and drink:	245.51	251.67	241.96	227.10	233.71
- Food purchases at supermarkets	91.63	108.44	114.31	99.35	100.84
- Restaurants	153.88	143.23	127.65	127.75	132.86
Souvenirs:	66.89	66.14	68.63	53.55	52.47
Leisure:	42.63	57.38	37.94	41.58	32.31
- Organized excursions	7.10	13.98	9.25	16.18	9.32
- Leisure, amusement	3.10	15.59	3.93	2.85	4.11
- Trip to other islands	2.11	0.78	1.39	0.88	0.38
- Sporting activities	1.06	4.89	5.45	5.95	5.04
- Cultural activities	0.83	1.69	1.83	2.42	1.15
- Discos and disco-pubs	28.44	20.45	16.08	13.29	12.30
Others:	17.97	27.03	17.21	22.93	14.35
- Wellness	4.47	4.42	3.82	5.09	3.45
- Medical expenses	4.50	7.11	3.08	2.46	4.04
- Other expenses	9.01	15.51	10.31	15.38	6.87

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.6%	1.8%	0.6%	0.6%	0.6%
Between 2 and 7 days	7.1%	6.3%	4.7%	2.8%	3.2%
Between 8 and 15 days	5.9%	6.0%	8.3%	9.7%	4.1%
Between 16 and 30 days	14.8%	19.2%	15.8%	14.7%	11.6%
Between 31 and 90 days	44.7%	40.3%	35.5%	35.5%	37.3%
More than 90 days	26.9%	26.5%	35.1%	36.7%	43.1%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	16.5%	14.0%	15.1%	8.2%	9.6%
Flight and accommodation (room only)	49.4%	48.2%	48.0%	51.4%	52.8%
Flight and accommodation (B&B)	10.2%	11.0%	11.1%	12.1%	8.9%
Flight and accommodation (half board)	8.5%	11.4%	12.9%	10.5%	13.2%
Flight and accommodation (full board)	2.5%	1.5%	2.6%	3.3%	0.9%
Flight and accommodation (all inclusive)	13.1%	13.8%	10.4%	14.4%	14.6%
% Tourists using low-cost airlines	48.7%	62.7%	72.8%	66.2%	79.4%
Other expenses in their place of residence:					
- Car rental	5.1%	2.9%	3.5%	7.6%	3.7%
- Sporting activities	1.5%	4.0%	3.2%	4.6%	2.2%
- Excursions	1.4%	1.0%	6.1%	5.5%	1.2%
- Trip to other islands	0.5%	0.3%	1.1%	1.1%	1.5%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	26.6%	31.4%	21.9%	23.5%	22.7%
- Tour Operator's website	92.4%	85.2%	82.3%	70.2%	94.6%
Accommodation	36.3%	29.7%	32.2%	36.2%	40.7%
- Accommodation's website	94.1%	88.6%	80.5%	90.6%	82.6%
Travel agency (High street)	10.8%	11.7%	15.7%	9.6%	10.3%
Online Travel Agency (OTA)	19.5%	18.2%	21.5%	26.3%	22.1%
No need to book accommodation	6.9%	9.1%	8.7%	4.4%	4.1%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	26.5%	29.9%	24.4%	25.8%	22.9%
- Tour Operator's website	82.4%	83.4%	67.4%	82.3%	87.5%
Airline	59.6%	51.8%	54.6%	58.2%	62.0%
- Airline's website	98.9%	98.5%	99.1%	98.4%	97.4%
Travel agency (High street)	7.4%	8.6%	13.0%	9.1%	9.9%
Online Travel Agency (OTA)	6.4%	9.7%	8.0%	7.0%	5.2%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	9.5%	5.5%	7.5%	5.6%	4.1%
4* Hotel	26.8%	27.1%	27.6%	26.8%	25.3%
1-2-3* Hotel	8.1%	11.3%	9.7%	14.2%	10.8%
Apartment	45.9%	46.5%	45.6%	47.7%	55.8%
Property (privately-owned, friends, family)	7.9%	9.6%	8.4%	4.3%	3.1%
Others	1.7%	0.0%	1.2%	1.3%	0.9%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	47.8%	56.0%	53.5%	47.3%	44.1%
Percentage of women	52.2%	44.0%	46.5%	52.7%	55.9%
Age					
Average age (tourists > 16 years old)	46.7	43.8	45.7	47.2	48.0
Standard deviation	14.0	14.1	14.2	15.3	14.9
Age range (> 16 years old)					
16-24 years old	4.1%	5.4%	6.9%	6.0%	6.9%
25-30 years old	12.1%	14.9%	11.8%	10.7%	5.8%
31-45 years old	29.6%	37.1%	28.6%	29.8%	30.8%
46-60 years old	35.9%	27.6%	35.9%	29.4%	33.8%
Over 60 years old	18.3%	15.0%	16.7%	24.0%	22.8%
Occupation					
Business owner or self-employed	30.6%	31.4%	35.4%	32.8%	27.6%
Upper/Middle management employee	26.1%	26.6%	30.4%	22.9%	29.6%
Auxiliary level employee	15.9%	19.6%	13.8%	15.0%	15.6%
Students	2.5%	3.4%	2.4%	3.2%	3.3%
Retired	18.8%	17.2%	14.0%	23.2%	21.4%
Unemployed / unpaid dom. work	6.1%	1.8%	4.0%	2.9%	2.6%
Annual household income level					
€12,000 - €24,000	11.9%	10.9%	12.3%	11.1%	10.2%
€24,001 - €36,000	21.2%	19.9%	16.3%	22.9%	16.4%
€36,001 - €48,000	21.6%	19.3%	19.0%	18.6%	19.6%
€48,001 - €60,000	13.7%	12.8%	16.0%	15.0%	16.1%
€60,001 - €72,000	7.6%	10.0%	7.5%	8.1%	10.2%
€72,001 - €84,000	5.8%	7.4%	8.8%	4.0%	6.4%
More than €84,000	18.2%	19.5%	20.2%	20.3%	21.0%

(*) 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.

Tourist profile trend (2016)

Ireland: Fourth Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	38,025	36,978	35,699	43,976	47,022
- Fuerteventura	8,468	5,533	6,932	7,979	8,145
- Gran Canaria	12,246	9,654	10,880	13,633	15,551
- Tenerife	18,925	21,338	18,317	22,546	26,512
- La Palma	0	0	0	0	0

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	49.0%	50.3%	49.7%	49.9%	48.4%
- Fuerteventura	10.9%	7.5%	9.7%	9.1%	8.4%
- Gran Canaria	15.8%	13.1%	15.1%	15.5%	16.0%
- Tenerife	24.4%	29.0%	25.5%	25.6%	27.3%
- La Palma	0.0%	0.0%	0.0%	0.0%	0.0%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	6.1%	8.0%	8.2%	10.0%	6.3%
Only with partner	62.8%	63.8%	50.3%	52.1%	40.5%
Only with children (under the age of 13)	0.5%	1.0%	2.5%	0.5%	0.4%
Partner + children (under the age of 13)	8.4%	7.3%	15.7%	5.7%	14.5%
Other relatives	7.6%	6.4%	10.8%	10.2%	8.6%
Friends	4.5%	4.6%	5.2%	6.6%	7.7%
Work colleagues	1.0%	0.0%	0.3%	0.5%	0.2%
Other combinations ⁽¹⁾	9.1%	8.8%	6.9%	14.5%	21.9%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	95.0%	92.2%	97.3%	94.9%	91.2%
Average rating (scale 1-10)	9.06	8.97	9.20	9.03	9.10

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	88.5%	87.9%	85.7%	85.9%	91.5%
In love (at least 10 previous visits)	26.5%	22.6%	19.0%	22.8%	30.4%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Ireland	97.0%	98.3%	95.8%	95.9%	94.2%
United Kingdom	2.5%	1.2%	2.0%	0.5%	3.6%
Spanish Mainland	0.0%	0.0%	1.8%	2.3%	2.2%
Germany	0.0%	0.5%	0.4%	0.8%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	90.7%	94.3%	93.4%	92.8%	92.4%
Tranquillity/rest/relaxation	40.7%	38.9%	42.8%	38.8%	30.9%
Beaches	26.0%	30.3%	30.0%	34.0%	24.9%
Price	22.0%	26.8%	17.9%	23.9%	15.6%
Ease of travel	14.3%	13.5%	13.5%	15.0%	13.6%
Scenery	8.0%	11.8%	8.8%	13.8%	13.1%
Nightlife/fun	8.1%	9.6%	6.1%	7.6%	10.9%
Suitable destination for children	5.3%	4.4%	10.4%	5.1%	10.5%
Quality of the environment	8.1%	5.2%	4.0%	6.8%	9.6%
Security	6.1%	5.1%	7.4%	5.5%	9.5%
Shopping	4.8%	4.7%	5.4%	6.9%	7.8%
Visiting new places	11.1%	6.5%	6.7%	6.4%	6.7%
Active tourism	0.6%	3.7%	4.0%	6.1%	3.7%
Culture	1.8%	0.9%	4.1%	1.8%	2.3%
Golf	2.8%	1.2%	0.3%	1.5%	1.9%
Theme parks	1.5%	0.9%	4.3%	0.9%	1.7%

* Multi-choice question

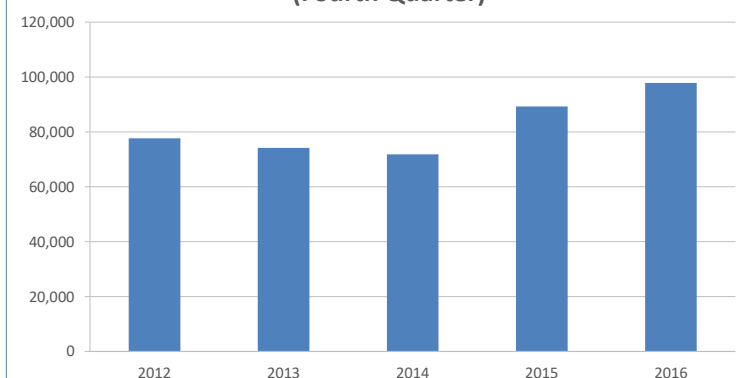
What did motivate them to come?



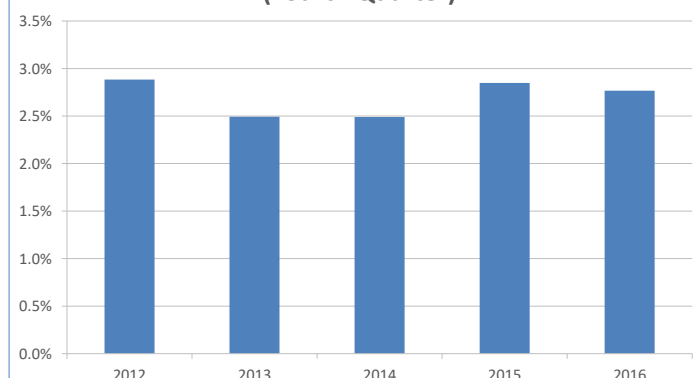
Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	71.7%	73.6%	76.5%	75.1%	80.5%
Recommendation by friends or relatives	38.6%	43.8%	42.7%	43.2%	40.6%
The Canary Islands television channel	0.0%	0.3%	0.0%	1.4%	0.0%
Other television or radio channels	0.5%	0.0%	0.3%	0.0%	0.3%
Information in the press/magazines/books	1.3%	1.8%	1.9%	2.5%	2.2%
Attendance at a tourism fair	0.8%	0.6%	0.4%	0.6%	0.0%
Tour Operator's brochure or catalogue	4.6%	6.5%	6.6%	6.2%	3.1%
Recommendation by Travel Agency	7.3%	3.8%	4.8%	7.3%	4.3%
Information obtained via the Internet	23.4%	26.3%	17.5%	18.0%	23.4%
Senior Tourism programme	0.5%	0.0%	0.0%	0.5%	0.0%
Others	3.5%	3.3%	4.4%	3.4%	4.5%

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(Fourth Quarter)



Share of tourists (> 16 years old)
(Fourth Quarter)



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.