

Tourist profile trend (2017)

IRELAND: Fourth Quarter



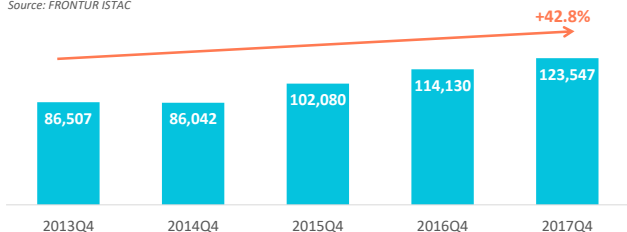
How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	86,507	86,042	102,080	114,130	123,547
Tourist arrivals (> 16 years old)	74,169	71,828	89,269	97,821	110,919
Average daily expenditure (€)	130.69	134.70	138.39	139.07	141.75
- in their place of residence	75.19	76.73	82.72	83.16	87.53
- in the Canary Islands	55.50	57.97	55.68	55.91	54.22
Average length of stay	8.84	9.08	9.07	8.66	8.70
Turnover per tourist (€)	1,099	1,034	1,175	1,130	1,158
Total turnover (€m)	95	89	120	129	143
Share of annual tourist	21.5%	20.8%	23.1%	23.7%	23.2%
Share of annual turnover	22.9%	20.3%	25.4%	24.4%	23.7%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	24.2%	27.7%	28.9%	28.1%	24.6%
- Additional accommodation expenses	4.8%	7.5%	5.4%	3.3%	7.4%
Transport:					
- Public transport	25.7%	20.1%	20.6%	21.3%	25.6%
- Taxi	43.2%	51.3%	44.8%	43.6%	49.8%
- Car rental	10.8%	10.6%	10.9%	11.3%	13.1%
Food and drink:					
- Food purchases at supermarkets	77.0%	79.1%	66.3%	72.2%	74.8%
- Restaurants	69.0%	64.8%	61.7%	65.3%	64.6%
Souvenirs:	63.9%	65.2%	51.7%	55.6%	55.3%
Leisure:					
- Organized excursions	19.5%	13.5%	16.3%	13.2%	16.3%
- Leisure, amusement	8.3%	8.7%	5.8%	8.9%	7.9%
- Trip to other islands	1.9%	1.3%	1.3%	0.9%	2.4%
- Sporting activities	6.8%	7.7%	7.0%	8.2%	6.5%
- Cultural activities	2.6%	3.5%	4.1%	2.1%	3.1%
- Discos and disco-pubs	17.3%	11.8%	12.2%	11.3%	11.7%
Others:					
- Wellness	7.9%	6.7%	6.7%	6.6%	9.7%
- Medical expenses	11.4%	8.0%	8.0%	13.8%	10.1%
- Other expenses	9.6%	11.7%	11.0%	6.2%	14.5%

TOURIST ARRIVALS

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	14.0%	15.1%	8.2%	9.6%	6.6%
Flight and accommodation (room only)	48.2%	48.0%	51.4%	52.8%	55.9%
Flight and accommodation (B&B)	11.0%	11.1%	12.1%	8.9%	9.8%
Flight and accommodation (half board)	11.4%	12.9%	10.5%	13.2%	16.4%
Flight and accommodation (full board)	1.5%	2.6%	3.3%	0.9%	2.2%
Flight and accommodation (all inclusive)	13.8%	10.4%	14.4%	14.6%	9.1%
<u>% Tourists using low-cost airlines</u>	62.7%	72.8%	66.2%	79.4%	78.5%
<u>Other expenses in their place of residence:</u>					
- Car rental	2.9%	3.5%	7.6%	3.7%	4.7%
- Sporting activities	4.0%	3.2%	4.6%	2.2%	3.3%
- Excursions	1.0%	6.1%	5.5%	1.2%	2.1%
- Trip to other islands	0.3%	1.1%	1.1%	1.5%	0.4%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	31.4%	21.9%	23.5%	22.7%	23.2%
- Tour Operator's website	85.2%	82.3%	70.2%	94.6%	79.2%
Accommodation	29.7%	32.2%	36.2%	40.7%	34.6%
- Accommodation's website	88.6%	80.5%	90.6%	82.6%	93.3%
Travel agency (High street)	11.7%	15.7%	9.6%	10.3%	9.6%
Online Travel Agency (OTA)	18.2%	21.5%	26.3%	22.1%	27.4%
No need to book accommodation	9.1%	8.7%	4.4%	4.1%	5.1%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	29.9%	24.4%	25.8%	22.9%	23.8%
- Tour Operator's website	83.4%	67.4%	82.3%	87.5%	82.5%
Airline	51.8%	54.6%	58.2%	62.0%	57.4%
- Airline's website	98.5%	99.1%	98.4%	97.4%	99.5%
Travel agency (High street)	8.6%	13.0%	9.1%	9.9%	7.4%
Online Travel Agency (OTA)	9.7%	8.0%	7.0%	5.2%	11.4%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	1.8%	0.6%	0.6%	0.6%	0.8%
Between 2 and 7 days	6.3%	4.7%	2.8%	3.2%	3.8%
Between 8 and 15 days	6.0%	8.3%	9.7%	4.1%	3.9%
Between 16 and 30 days	19.2%	15.8%	14.7%	11.6%	9.3%
Between 31 and 90 days	40.3%	35.5%	35.5%	37.3%	40.4%
More than 90 days	26.5%	35.1%	36.7%	43.1%	41.9%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	56.0%	53.5%	47.3%	44.1%	53.8%
Women	44.0%	46.5%	52.7%	55.9%	46.2%

Age

Average age (tourists > 16 years old)	43.8	45.7	47.2	48.0	48.3
Standard deviation	14.1	14.2	15.3	14.9	15.0

Age range (> 16 years old)

16-24 years old	5.4%	6.9%	6.0%	6.9%	6.3%
25-30 years old	14.9%	11.8%	10.7%	5.8%	7.5%
31-45 years old	37.1%	28.6%	29.8%	30.8%	28.7%
46-60 years old	27.6%	35.9%	29.4%	33.8%	33.5%
Over 60 years old	15.0%	16.7%	24.0%	22.8%	24.0%

Occupation

Business owner or self-employed	31.4%	35.4%	32.8%	27.6%	30.1%
Upper/Middle management employee	26.6%	30.4%	22.9%	29.6%	23.8%
Auxiliary level employee	19.6%	13.8%	15.0%	15.6%	20.5%
Students	3.4%	2.4%	3.2%	3.3%	2.1%
Retired	17.2%	14.0%	23.2%	21.4%	19.2%
Unemployed / unpaid dom. work	1.8%	4.0%	2.9%	2.6%	4.2%

Annual household income level

€12,000 - €24,000	10.9%	12.3%	11.1%	10.2%	9.2%
€24,001 - €36,000	19.9%	16.3%	22.9%	16.4%	17.9%
€36,001 - €48,000	19.3%	19.0%	18.6%	19.6%	20.9%
€48,001 - €60,000	12.8%	16.0%	15.0%	16.1%	14.3%
€60,001 - €72,000	10.0%	7.5%	8.1%	10.2%	11.4%
€72,001 - €84,000	7.4%	8.8%	4.0%	6.4%	6.7%
More than €84,000	19.5%	20.2%	20.3%	21.0%	19.6%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	36,978	35,699	43,976	47,022	53,527
- Fuerteventura	5,533	6,932	7,979	8,145	8,870
- Gran Canaria	9,654	10,880	13,633	15,551	19,383
- Tenerife	21,338	18,317	22,546	26,512	28,661
- La Palma	0	0	0	0	0

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	50.3%	49.7%	49.9%	48.4%	48.5%
- Fuerteventura	7.5%	9.7%	9.1%	8.4%	8.0%
- Gran Canaria	13.1%	15.1%	15.5%	16.0%	17.6%
- Tenerife	29.0%	25.5%	25.6%	27.3%	26.0%
- La Palma	0.0%	0.0%	0.0%	0.0%	0.0%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	5.5%	7.5%	5.6%	4.1%	5.1%
4* Hotel	27.1%	27.6%	26.8%	25.3%	26.8%
1-2-3* Hotel	11.3%	9.7%	14.2%	10.8%	10.6%
Apartment	46.5%	45.6%	47.7%	55.8%	51.7%
Property (privately-owned, friends, family)	9.6%	8.4%	4.3%	3.1%	2.6%
Others	0.0%	1.2%	1.3%	0.9%	3.3%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	94.3%	93.4%	92.8%	92.4%	94.4%
Tranquillity/rest/relaxation	38.9%	42.8%	38.8%	30.9%	33.8%
Beaches	30.3%	30.0%	34.0%	24.9%	28.9%
Scenery	11.8%	8.8%	13.8%	13.1%	15.2%
Price	26.8%	17.9%	23.9%	15.6%	13.5%
Ease of travel	13.5%	13.5%	15.0%	13.6%	13.4%
Suitable destination for children	4.4%	10.4%	5.1%	10.5%	11.3%
Security	5.1%	7.4%	5.5%	9.5%	9.7%
Quality of the environment	5.2%	4.0%	6.8%	9.6%	8.2%
Visiting new places	6.5%	6.7%	6.4%	6.7%	7.0%
Nightlife/fun	9.6%	6.1%	7.6%	10.9%	6.5%
Active tourism	3.7%	4.0%	6.1%	3.7%	5.2%
Shopping	4.7%	5.4%	6.9%	7.8%	4.7%
Theme parks	0.9%	4.3%	0.9%	1.7%	2.8%
Nautical activities	0.4%	0.9%	1.5%	0.1%	1.9%
Culture	0.9%	4.1%	1.8%	2.3%	0.7%

* Multi-chose question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	8.0%	8.2%	10.0%	6.3%	10.5%
Only with partner	63.8%	50.3%	52.1%	40.5%	40.7%
Only with children (under the age of 13)	1.0%	2.5%	0.5%	0.4%	0.5%
Partner + children (under the age of 13)	7.3%	15.7%	5.7%	14.5%	15.0%
Other relatives	6.4%	10.8%	10.2%	8.6%	9.1%
Friends	4.6%	5.2%	6.6%	7.7%	7.1%
Work colleagues	0.0%	0.3%	0.5%	0.2%	0.3%
Other combinations ⁽¹⁾	8.8%	6.9%	14.5%	21.9%	16.7%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	92.2%	97.3%	94.9%	91.2%	96.3%
Average rating (scale 1-10)	8.97	9.20	9.03	9.10	9.25

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	87.9%	85.7%	85.9%	91.5%	90.0%
At least 10 previous visits	22.6%	19.0%	22.8%	30.4%	24.0%

Where does the flight come from?

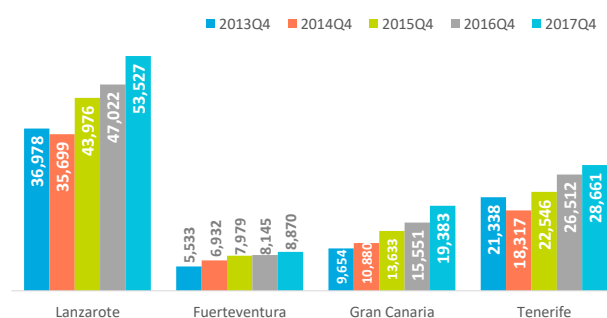
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Ireland	98.3%	95.8%	95.9%	94.2%	94.0%
United Kingdom	1.2%	2.0%	0.5%	3.6%	4.8%
Spanish Mainland	0.0%	1.8%	2.3%	2.2%	1.2%
Germany	0.5%	0.4%	0.8%	0.0%	0.0%
Others	0.0%	0.0%	0.4%	0.0%	0.0%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	73.6%	76.5%	75.1%	80.5%	79.1%
Recommendation by friends/relatives	43.8%	42.7%	43.2%	40.6%	36.7%
The Canary Islands television channel	0.3%	0.0%	1.4%	0.0%	0.0%
Other television or radio channels	0.0%	0.3%	0.0%	0.3%	0.4%
Information in press/magazines/books	1.8%	1.9%	2.5%	2.2%	2.8%
Attendance at a tourism fair	0.6%	0.4%	0.6%	0.0%	0.0%
Tour Operator's brochure or catalogue	6.5%	6.6%	6.2%	3.1%	2.8%
Recommendation by Travel Agency	3.8%	4.8%	7.3%	4.3%	6.6%
Information obtained via the Internet	26.3%	17.5%	18.0%	23.4%	18.3%
Senior Tourism programme	0.0%	0.0%	0.5%	0.0%	0.3%
Others	3.3%	4.4%	3.4%	4.5%	4.5%

* Multi-chose question

Tourist arrivals by islands



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.