

Tourist profile trend (2016)

Ireland: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	69,751	75,619	72,595	81,246	94,232
Average daily expenditure (€)	121.93	124.05	134.15	122.40	136.02
. in their place of residence	65.52	71.36	75.21	71.76	79.86
. in the Canary Islands	56.41	52.68	58.95	50.64	56.16
Average length of stay	8.70	10.07	10.35	9.64	8.83
Turnover per tourist (€)	987	1,061	1,205	1,015	1,091
Total turnover (> 16 years old) (€m)	68.8	80.3	87.5	82.5	103
Share of total turnover	21.2%	22.6%	23.6%	20.6%	22.9%
Share of total tourist	22.3%	22.0%	20.7%	21.6%	23.0%

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

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation (**):	69.48	59.94	109.10	40.43	100.11
- Accommodation	62.21	55.31	97.03	38.31	94.64
- Additional accommodation expenses	7.27	4.64	12.08	2.12	5.47
Transport:	34.71	32.80	29.44	27.32	31.15
- Public transport	8.79	8.07	7.04	3.38	8.05
- Taxi	17.07	12.46	12.55	12.77	14.78
- Car rental	8.85	12.28	9.85	11.17	8.32
Food and drink:	231.48	249.40	252.46	252.23	216.13
- Food purchases at supermarkets	83.66	108.58	113.38	97.11	90.30
- Restaurants	147.82	140.81	139.08	155.13	125.84
Souvenirs:	59.34	60.55	50.32	41.49	58.83
Leisure:	37.59	35.09	40.16	41.13	36.90
- Organized excursions	9.63	8.03	11.82	7.50	11.89
- Leisure, amusement	3.59	1.88	2.16	4.81	4.24
- Trip to other islands	0.16	2.19	1.95	3.32	0.71
- Sporting activities	1.65	4.56	7.61	4.58	5.24
- Cultural activities	2.60	3.28	1.51	1.20	2.51
- Discos and disco-pubs	19.95	15.15	15.10	19.72	12.31
Others:	28.73	30.57	26.51	29.17	20.08
- Wellness	8.07	7.92	4.33	5.30	4.73
- Medical expenses	3.90	4.70	5.52	3.52	4.08
- Other expenses	16.76	17.95	16.66	20.35	11.27

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.0%	0.0%	0.5%	0.6%	1.6%
Between 2 and 7 days	6.9%	5.5%	4.5%	3.0%	5.6%
Between 8 and 15 days	5.6%	6.8%	8.2%	10.7%	9.9%
Between 16 and 30 days	20.5%	22.5%	16.9%	21.9%	17.9%
Between 31 and 90 days	44.9%	37.6%	39.4%	34.1%	33.1%
More than 90 days	22.1%	27.6%	30.4%	29.7%	31.8%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	16.3%	12.2%	14.5%	14.5%	10.7%
Flight and accommodation (room only)	51.2%	49.1%	42.7%	50.6%	51.5%
Flight and accommodation (B&B)	12.6%	12.0%	15.2%	13.8%	13.3%
Flight and accommodation (half board)	9.5%	17.5%	13.7%	11.7%	12.6%
Flight and accommodation (full board)	1.6%	2.3%	3.1%	1.2%	2.3%
Flight and accommodation (all inclusive)	8.8%	7.0%	10.8%	8.2%	9.6%
% Tourists using low-cost airlines	56.6%	47.5%	47.4%	66.5%	57.4%

Other expenses in their place of residence:

- Car rental	3.2%	4.5%	5.0%	4.2%	2.8%
- Sporting activities	3.5%	1.2%	1.0%	2.7%	3.6%
- Excursions	0.4%	2.7%	1.3%	1.8%	2.2%
- Trip to other islands	0.5%	0.0%	0.0%	0.0%	0.0%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	23.7%	23.5%	23.7%	22.1%	29.7%
- Tour Operator's website	66.9%	82.5%	77.1%	77.2%	78.8%
Accommodation	44.1%	38.4%	41.3%	38.5%	34.2%
- Accommodation's website	91.7%	88.1%	85.4%	90.2%	82.1%
Travel agency (High street)	7.6%	8.8%	11.0%	10.3%	8.1%
Online Travel Agency (OTA)	16.6%	20.9%	14.9%	19.1%	19.9%
No need to book accommodation	8.0%	8.4%	9.2%	10.0%	8.1%

Flight booking

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tour Operator	32.8%	20.1%	25.6%	22.9%	25.8%
- Tour Operator's website	67.0%	82.4%	75.0%	85.3%	78.7%
Airline	51.3%	64.3%	59.1%	57.4%	59.3%
- Airline's website	97.2%	99.1%	97.0%	98.0%	96.7%
Travel agency (High street)	6.1%	8.3%	9.2%	8.6%	8.1%
Online Travel Agency (OTA)	9.8%	7.3%	6.2%	11.0%	6.9%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	5.7%	8.0%	8.7%	3.6%	3.2%
4* Hotel	29.1%	23.9%	25.8%	25.1%	29.2%
1-2-3* Hotel	13.3%	11.0%	13.6%	16.6%	10.4%
Apartment	46.1%	47.9%	43.7%	45.4%	50.7%
Property (privately-owned, friends, family)	5.8%	8.7%	7.5%	8.6%	5.9%
Others	0.0%	0.5%	0.8%	0.8%	0.6%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	59.1%	46.6%	53.2%	55.3%	49.4%
Percentage of women	40.9%	53.4%	46.8%	44.7%	50.6%

Age

Average age (tourists > 16 years old)	46.0	47.9	49.2	49.1	50.0
Standard deviation	13.3	14.3	14.8	14.8	15.0

Age range (> 16 years old)

16-24 years old	4.9%	3.1%	4.2%	6.0%	4.4%
25-30 years old	9.6%	9.5%	11.5%	8.5%	8.2%
31-45 years old	35.8%	33.3%	23.7%	23.0%	25.9%
46-60 years old	34.4%	32.1%	33.5%	39.0%	33.6%
Over 60 years old	15.4%	22.0%	27.1%	23.5%	27.9%

Occupation

Business owner or self-employed	40.1%	33.1%	41.6%	34.6%	33.0%
Upper/Middle management employee	22.9%	24.6%	20.9%	21.8%	20.0%
Auxiliary level employee	12.4%	16.4%	10.7%	11.0%	13.6%
Students	3.1%	3.6%	1.1%	3.7%	2.5%
Retired	17.8%	20.4%	22.5%	23.5%	28.5%
Unemployed / unpaid dom. work	3.6%	1.9%	3.2%	5.4%	2.5%

Annual household income level

€12,000 - €24,000	7.5%	12.4%	8.8%	14.5%	10.5%
€24,001 - €36,000	17.6%	17.6%	20.5%	13.3%	17.6%
€36,001 - €48,000	19.0%	14.7%	18.4%	23.6%	17.2%
€48,001 - €60,000	16.0%	21.6%	18.4%	11.2%	12.5%
€60,001 - €72,000	12.4%	6.2%	9.2%	14.2%	10.1%
€72,001 - €84,000	7.2%	6.9%	5.4%	3.8%	10.8%
More than €84,000	20.3%	20.6%	19.2%	19.4%	21.4%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	37,100	35,931	34,251	40,764	43,512
- Fuerteventura	5,554	5,603	4,231	6,504	7,993
- Gran Canaria	11,225	12,495	11,806	10,991	14,892
- Tenerife	15,871	20,475	22,024	22,740	27,094
- La Palma	0	50	0	0	0

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	53.2%	48.2%	47.4%	50.3%	46.5%
- Fuerteventura	8.0%	7.5%	5.9%	8.0%	8.5%
- Gran Canaria	16.1%	16.8%	16.3%	13.6%	15.9%
- Tenerife	22.8%	27.5%	30.5%	28.1%	29.0%
- La Palma	0.0%	0.1%	0.0%	0.0%	0.0%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	5.7%	6.2%	9.2%	8.3%	8.6%
Only with partner	57.6%	61.3%	60.0%	59.6%	45.7%
Only with children (under the age of 13)	1.3%	0.0%	0.0%	0.9%	0.3%
Partner + children (under the age of 13)	12.2%	7.4%	8.3%	5.6%	11.4%
Other relatives	4.7%	9.4%	5.4%	5.0%	11.5%
Friends	5.2%	8.8%	4.8%	11.9%	9.0%
Work colleagues	0.0%	0.0%	1.0%	0.8%	0.4%
Other combinations ⁽¹⁾	13.2%	7.0%	11.3%	7.9%	13.2%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	92.1%	96.2%	93.5%	95.7%	96.6%
Average rating (scale 1-10)	8.89	9.06	8.97	9.04	9.22

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	90.2%	91.3%	93.5%	90.4%	88.5%
In love (at least 10 previous visits)	22.9%	28.2%	23.3%	28.6%	27.9%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Ireland	94.5%	98.2%	95.9%	96.8%	97.4%
United Kingdom	5.4%	1.8%	3.5%	2.4%	2.2%
Spanish Mainland	0.0%	0.0%	0.5%	0.0%	0.4%
Germany	0.1%	0.0%	0.0%	0.7%	0.0%
Netherlands	0.0%	0.1%	0.0%	0.0%	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%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	95.1%	98.1%	94.6%	93.9%	94.6%
Tranquillity/rest/relaxation	39.0%	39.6%	38.3%	34.6%	35.2%
Beaches	24.5%	25.4%	30.6%	23.0%	30.5%
Price	21.4%	20.7%	18.0%	21.4%	17.8%
Ease of travel	25.1%	20.0%	13.0%	14.6%	15.3%
Nightlife/fun	9.2%	8.0%	5.9%	10.2%	11.7%
Suitable destination for children	8.6%	4.8%	5.4%	2.5%	9.1%
Security	4.1%	6.3%	6.2%	5.8%	9.0%
Scenery	7.6%	8.4%	9.9%	10.2%	8.0%
Active tourism	1.5%	2.5%	4.2%	3.3%	5.4%
Quality of the environment	6.2%	9.1%	6.6%	5.4%	4.9%
Visiting new places	7.2%	9.8%	4.4%	7.2%	4.9%
Shopping	4.4%	1.8%	4.6%	6.3%	4.6%
Culture	2.4%	3.3%	2.3%	5.0%	2.3%
Golf	1.4%	2.3%	2.4%	2.5%	2.0%
Theme parks	1.9%	0.9%	1.2%	2.3%	1.8%

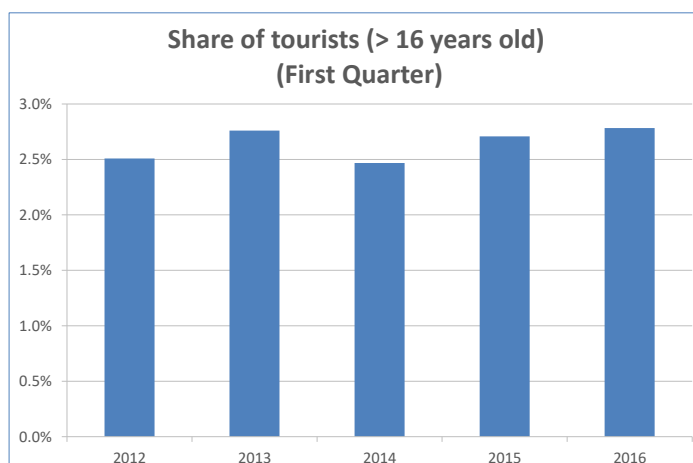
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	83.8%	77.4%	79.5%	81.0%	77.8%
Recommendation by friends or relatives	41.5%	46.6%	39.4%	40.2%	45.4%
The Canary Islands television channel	0.3%	0.0%	0.0%	0.0%	0.0%
Other television or radio channels	0.0%	0.4%	0.0%	0.8%	0.0%
Information in the press/magazines/books	1.2%	2.9%	2.6%	2.1%	1.6%
Attendance at a tourism fair	0.7%	0.3%	0.4%	0.7%	0.0%
Tour Operator's brochure or catalogue	7.6%	4.0%	2.2%	2.9%	3.6%
Recommendation by Travel Agency	5.3%	6.2%	5.8%	1.7%	5.4%
Information obtained via the Internet	22.2%	23.0%	20.7%	14.9%	21.3%
Senior Tourism programme	0.0%	0.3%	0.0%	0.0%	0.5%
Others	2.9%	2.5%	4.3%	3.8%	5.0%

* Multi-choice question



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.