

Tourist profile trend (2017)

Ireland: First Quarter

How many are they and how much do they spend?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	75,619	72,595	81,246	94,232	97,714
Average daily expenditure (€)	124.05	134.15	122.40	136.02	137.10
. in their place of residence	71.36	75.21	71.76	79.86	87.71
. in the Canary Islands	52.68	58.95	50.64	56.16	49.40
Average length of stay	10.07	10.35	9.64	8.83	9.60
Turnover per tourist (€)	1,061	1,205	1,015	1,091	1,148
Total turnover (> 16 years old) (€m)	80.3	87.5	82.5	103	112
Share of total turnover	22.6%	23.6%	20.6%	22.9%	--
Share of total tourist	22.0%	20.7%	21.6%	23.0%	--

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

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation (**):	59.94	109.10	40.43	100.11	94.65
- Accommodation	55.31	97.03	38.31	94.64	86.85
- Additional accommodation expenses	4.64	12.08	2.12	5.47	7.79
Transport:	32.80	29.44	27.32	31.15	30.08
- Public transport	8.07	7.04	3.38	8.05	9.44
- Taxi	12.46	12.55	12.77	14.78	15.91
- Car rental	12.28	9.85	11.17	8.32	4.72
Food and drink:	249.40	252.46	252.23	216.13	218.40
- Food purchases at supermarkets	108.58	113.38	97.11	90.30	94.37
- Restaurants	140.81	139.08	155.13	125.84	124.03
Souvenirs:	60.55	50.32	41.49	58.83	40.66
Leisure:	35.09	40.16	41.13	36.90	30.99
- Organized excursions	8.03	11.82	7.50	11.89	10.06
- Leisure, amusement	1.88	2.16	4.81	4.24	2.86
- Trip to other islands	2.19	1.95	3.32	0.71	3.65
- Sporting activities	4.56	7.61	4.58	5.24	2.45
- Cultural activities	3.28	1.51	1.20	2.51	1.01
- Discos and disco-pubs	15.15	15.10	19.72	12.31	10.97
Others:	30.57	26.51	29.17	20.08	13.97
- Wellness	7.92	4.33	5.30	4.73	3.49
- Medical expenses	4.70	5.52	3.52	4.08	2.61
- Other expenses	17.95	16.66	20.35	11.27	7.87

How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.0%	0.5%	0.6%	1.6%	0.2%
Between 2 and 7 days	5.5%	4.5%	3.0%	5.6%	6.5%
Between 8 and 15 days	6.8%	8.2%	10.7%	9.9%	5.3%
Between 16 and 30 days	22.5%	16.9%	21.9%	17.9%	16.3%
Between 31 and 90 days	37.6%	39.4%	34.1%	33.1%	37.2%
More than 90 days	27.6%	30.4%	29.7%	31.8%	34.4%

What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	12.2%	14.5%	14.5%	10.7%	10.0%
Flight and accommodation (room only)	49.1%	42.7%	50.6%	51.5%	44.0%
Flight and accommodation (B&B)	12.0%	15.2%	13.8%	13.3%	12.3%
Flight and accommodation (half board)	17.5%	13.7%	11.7%	12.6%	18.4%
Flight and accommodation (full board)	2.3%	3.1%	1.2%	2.3%	3.2%
Flight and accommodation (all inclusive)	7.0%	10.8%	8.2%	9.6%	12.0%
% Tourists using low-cost airlines	47.5%	47.4%	66.5%	57.4%	63.1%

Other expenses in their place of residence:

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Car rental	4.5%	5.0%	4.2%	2.8%	3.7%
- Sporting activities	1.2%	1.0%	2.7%	3.6%	1.9%
- Excursions	2.7%	1.3%	1.8%	2.2%	2.1%
- Trip to other islands	0.0%	0.0%	0.0%	0.0%	0.2%

How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation booking					
Tour Operator	23.5%	23.7%	22.1%	29.7%	22.6%
- Tour Operator's website	82.5%	77.1%	77.2%	78.8%	58.5%
Accommodation	38.4%	41.3%	38.5%	34.2%	30.3%
- Accommodation's website	88.1%	85.4%	90.2%	82.1%	89.6%
Travel agency (High street)	8.8%	11.0%	10.3%	8.1%	14.0%
Online Travel Agency (OTA)	20.9%	14.9%	19.1%	19.9%	25.7%
No need to book accommodation	8.4%	9.2%	10.0%	8.1%	7.5%

Flight booking

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	20.1%	25.6%	22.9%	25.8%	22.4%
- Tour Operator's website	82.4%	75.0%	85.3%	78.7%	67.8%
Airline	64.3%	59.1%	57.4%	59.3%	53.9%
- Airline's website	99.1%	97.0%	98.0%	96.7%	99.3%
Travel agency (High street)	8.3%	9.2%	8.6%	8.1%	14.5%
Online Travel Agency (OTA)	7.3%	6.2%	11.0%	6.9%	9.2%

Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	8.0%	8.7%	3.6%	3.2%	5.0%
4* Hotel	23.9%	25.8%	25.1%	29.2%	33.9%
1-2-3* Hotel	11.0%	13.6%	16.6%	10.4%	8.3%
Apartment	47.9%	43.7%	45.4%	50.7%	45.2%
Property (privately-owned, friends, family)	8.7%	7.5%	8.6%	5.9%	4.8%
Others	0.5%	0.8%	0.8%	0.6%	2.8%

Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Gender					
Percentage of men	46.6%	53.2%	55.3%	49.4%	45.5%
Percentage of women	53.4%	46.8%	44.7%	50.6%	54.5%

Age

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Average age (tourists > 16 years old)	47.9	49.2	49.1	50.0	53.1
Standard deviation	14.3	14.8	14.8	15.0	14.4

Age range (> 16 years old)

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
16-24 years old	3.1%	4.2%	6.0%	4.4%	3.6%
25-30 years old	9.5%	11.5%	8.5%	8.2%	4.0%
31-45 years old	33.3%	23.7%	23.0%	25.9%	24.0%
46-60 years old	32.1%	33.5%	39.0%	33.6%	34.2%
Over 60 years old	22.0%	27.1%	23.5%	27.9%	34.1%

Occupation

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Business owner or self-employed	33.1%	41.6%	34.6%	33.0%	25.1%
Upper/Middle management employee	24.6%	20.9%	21.8%	20.0%	24.0%
Auxiliary level employee	16.4%	10.7%	11.0%	13.6%	13.4%
Students	3.6%	1.1%	3.7%	2.5%	1.8%
Retired	20.4%	22.5%	23.5%	28.5%	31.4%
Unemployed / unpaid dom. work	1.9%	3.2%	5.4%	2.5%	4.4%

Annual household income level

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
€12,000 - €24,000	12.4%	8.8%	14.5%	10.5%	10.7%
€24,001 - €36,000	17.6%	20.5%	13.3%	17.6%	12.8%
€36,001 - €48,000	14.7%	18.4%	23.6%	17.2%	14.5%
€48,001 - €60,000	21.6%	18.4%	11.2%	12.5%	17.1%
€60,001 - €72,000	6.2%	9.2%	14.2%	10.1%	12.9%
€72,001 - €84,000	6.9%	5.4%	3.8%	10.8%	7.9%
More than €84,000	20.6%	19.2%	19.4%	21.4%	24.0%

(*) 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 (2017)

Ireland: First Quarter

Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	35,931	34,251	40,764	43,512	47,536
- Fuerteventura	5,603	4,231	6,504	7,993	7,472
- Gran Canaria	12,495	11,806	10,991	14,892	17,738
- Tenerife	20,475	22,024	22,740	27,094	24,409
- La Palma	50	0	0	0	260

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	48.2%	47.4%	50.3%	46.5%	48.8%
- Fuerteventura	7.5%	5.9%	8.0%	8.5%	7.7%
- Gran Canaria	16.8%	16.3%	13.6%	15.9%	18.2%
- Tenerife	27.5%	30.5%	28.1%	29.0%	25.1%
- La Palma	0.1%	0.0%	0.0%	0.0%	0.3%

Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	6.2%	9.2%	8.3%	8.6%	8.0%
Only with partner	61.3%	60.0%	59.6%	45.7%	47.3%
Only with children (under the age of 13)	0.0%	0.0%	0.9%	0.3%	1.4%
Partner + children (under the age of 13)	7.4%	8.3%	5.6%	11.4%	10.7%
Other relatives	9.4%	5.4%	5.0%	11.5%	12.3%
Friends	8.8%	4.8%	11.9%	9.0%	6.4%
Work colleagues	0.0%	1.0%	0.8%	0.4%	0.0%
Other combinations ⁽¹⁾	7.0%	11.3%	7.9%	13.2%	13.9%

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

How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	96.2%	93.5%	95.7%	96.6%	91.0%
Average rating (scale 1-10)	9.06	8.97	9.04	9.22	8.83

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	91.3%	93.5%	90.4%	88.5%	92.4%
In love (at least 10 previous visits)	28.2%	23.3%	28.6%	27.9%	28.2%

Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Ireland	98.2%	95.9%	96.8%	97.4%	93.7%
United Kingdom	1.8%	3.5%	2.4%	2.2%	4.4%
Spanish Mainland	0.0%	0.5%	0.0%	0.4%	1.4%
Italy	0.0%	0.0%	0.0%	0.0%	0.4%
Netherlands	0.1%	0.0%	0.0%	0.0%	0.1%
Germany	0.0%	0.0%	0.7%	0.0%	0.0%
Austria	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	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	98.1%	94.6%	93.9%	94.6%	95.6%
Tranquillity/rest/relaxation	39.6%	38.3%	34.6%	35.2%	36.0%
Beaches	25.4%	30.6%	23.0%	30.5%	29.2%
Price	20.7%	18.0%	21.4%	17.8%	22.3%
Ease of travel	20.0%	13.0%	14.6%	15.3%	13.4%
Scenery	8.4%	9.9%	10.2%	8.0%	10.9%
Security	6.3%	6.2%	5.8%	9.0%	9.5%
Quality of the environment	9.1%	6.6%	5.4%	4.9%	9.4%
Suitable destination for children	4.8%	5.4%	2.5%	9.1%	8.8%
Nightlife/fun	8.0%	5.9%	10.2%	11.7%	6.8%
Visiting new places	9.8%	4.4%	7.2%	4.9%	5.9%
Shopping	1.8%	4.6%	6.3%	4.6%	3.9%
Golf	2.3%	2.4%	2.5%	2.0%	2.0%
Culture	3.3%	2.3%	5.0%	2.3%	1.8%
Theme parks	0.9%	1.2%	2.3%	1.8%	1.6%
Active tourism	2.5%	4.2%	3.3%	5.4%	1.5%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	77.4%	79.5%	81.0%	77.8%	78.6%
Recommendation by friends or relatives	46.6%	39.4%	40.2%	45.4%	44.9%
The Canary Islands television channel	0.0%	0.0%	0.0%	0.0%	0.0%
Other television or radio channels	0.4%	0.0%	0.8%	0.0%	0.5%
Information in the press/magazines/books	2.9%	2.6%	2.1%	1.6%	1.4%
Attendance at a tourism fair	0.3%	0.4%	0.7%	0.0%	0.2%
Tour Operator's brochure or catalogue	4.0%	2.2%	2.9%	3.6%	4.4%
Recommendation by Travel Agency	6.2%	5.8%	1.7%	5.4%	6.6%
Information obtained via the Internet	23.0%	20.7%	14.9%	21.3%	15.4%
Senior Tourism programme	0.3%	0.0%	0.0%	0.5%	0.0%
Others	2.5%	4.3%	3.8%	5.0%	3.9%

* Multi-choice question

