

Tourist profile trend (2017)

Ireland: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	100,483	104,588	100,012	109,738	117,495
Average daily expenditure (€)	118.56	127.40	130.14	132.31	138.92
. in their place of residence	65.36	76.70	78.14	78.15	80.35
. in the Canary Islands	53.20	50.70	52.00	54.16	58.57
Average length of stay	9.84	9.09	9.34	9.56	8.99
Turnover per tourist (€)	1,077	1,085	1,122	1,159	1,171
Total turnover (> 16 years old) (€m)	108	113	112	127	138
Share of total turnover	30.5%	30.6%	28.0%	28.3%	--
Share of total tourist	29.2%	29.9%	26.6%	26.8%	--

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

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation (**):	58.58	56.63	82.28	94.40	82.16
- Accommodation	56.19	49.29	75.77	88.75	79.11
- Additional accommodation expenses	2.38	7.33	6.52	5.65	3.04
Transport:	28.84	26.42	31.22	27.54	27.61
- Public transport	9.02	6.11	9.70	9.18	6.35
- Taxi	13.12	13.61	14.42	14.30	14.74
- Car rental	6.69	6.70	7.11	4.06	6.52
Food and drink:	246.83	239.72	213.48	228.51	267.16
- Food purchases at supermarkets	108.05	107.73	93.13	96.22	119.14
- Restaurants	138.78	131.99	120.34	132.29	148.02
Souvenirs:	55.09	51.13	52.42	58.82	56.41
Leisure:	69.66	47.42	54.59	58.38	55.09
- Organized excursions	20.36	16.59	17.64	19.27	18.07
- Leisure, amusement	9.34	7.32	8.38	9.92	9.15
- Trip to other islands	3.50	0.73	1.39	1.11	0.65
- Sporting activities	10.11	5.11	5.96	4.76	7.24
- Cultural activities	1.07	2.54	1.65	1.89	0.82
- Discos and disco-pubs	25.28	15.13	19.57	21.43	19.15
Others:	21.48	10.20	12.50	17.22	11.22
- Wellness	2.90	2.93	4.03	8.13	3.31
- Medical expenses	2.86	2.45	3.28	2.47	2.81
- Other expenses	15.72	4.83	5.20	6.61	5.10

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.0%	1.3%	0.2%	0.5%	0.8%
Between 2 and 7 days	5.6%	8.6%	4.8%	2.5%	6.4%
Between 8 and 15 days	10.2%	6.5%	6.1%	4.6%	6.2%
Between 16 and 30 days	17.5%	16.7%	14.8%	9.7%	8.9%
Between 31 and 90 days	28.2%	27.6%	30.1%	34.1%	31.3%
More than 90 days	38.5%	39.2%	44.0%	48.6%	46.4%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	9.9%	6.7%	6.7%	6.3%	6.5%
Flight and accommodation (room only)	64.1%	55.2%	57.0%	55.8%	55.2%
Flight and accommodation (B&B)	6.8%	8.0%	11.4%	8.7%	10.4%
Flight and accommodation (half board)	7.6%	12.6%	8.3%	14.1%	11.0%
Flight and accommodation (full board)	2.6%	1.7%	3.2%	2.5%	2.4%
Flight and accommodation (all inclusive)	8.9%	15.8%	13.4%	12.6%	14.5%
% Tourists using low-cost airlines	76.2%	69.6%	72.7%	73.5%	73.7%
Other expenses in their place of residence:					
- Car rental	2.0%	2.1%	1.8%	1.8%	3.9%
- Sporting activities	1.0%	1.7%	2.4%	2.7%	3.5%
- Excursions	3.2%	1.5%	2.9%	2.1%	2.4%
- Trip to other islands	0.7%	0.4%	1.3%	0.0%	1.4%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	31.0%	33.1%	30.4%	26.2%	25.3%
- Tour Operator's website	77.2%	72.9%	78.6%	86.0%	90.2%
Accommodation	27.0%	28.5%	36.5%	34.4%	28.6%
- Accommodation's website	89.5%	76.0%	86.1%	91.7%	92.2%
Travel agency (High street)	12.4%	15.2%	9.1%	10.8%	17.1%
Online Travel Agency (OTA)	21.5%	19.1%	20.5%	24.6%	24.4%
No need to book accommodation	8.1%	4.1%	3.6%	4.0%	4.6%

Flight booking

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	32.3%	31.0%	30.4%	26.1%	21.5%
- Tour Operator's website	82.5%	70.8%	77.6%	85.3%	83.9%
Airline	46.4%	49.2%	53.6%	57.6%	52.0%
- Airline's website	99.5%	98.9%	99.8%	97.9%	99.1%
Travel agency (High street)	10.8%	14.4%	8.0%	7.8%	15.6%
Online Travel Agency (OTA)	10.4%	5.4%	8.0%	8.5%	10.9%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	4.0%	6.6%	5.4%	4.7%	4.2%
4* Hotel	22.2%	24.4%	23.3%	29.8%	22.9%
1-2-3* Hotel	12.4%	11.1%	15.9%	8.1%	12.4%
Apartment	53.9%	51.6%	51.3%	54.0%	57.1%
Property (privately-owned, friends, family)	7.1%	4.9%	3.0%	3.1%	2.7%
Others	0.5%	1.3%	1.1%	0.3%	0.6%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	57.4%	45.3%	45.7%	45.8%	47.7%
Percentage of women	42.6%	54.7%	54.3%	54.2%	52.3%

Age

Average age (tourists > 16 years old)	37.3	39.8	40.1	41.7	41.8
Standard deviation	12.7	12.7	13.1	13.4	15.1

Age range (> 16 years old)

16-24 years old	17.2%	14.5%	13.1%	11.6%	16.7%
25-30 years old	20.6%	14.8%	15.2%	14.8%	12.1%
31-45 years old	34.6%	36.3%	39.0%	33.6%	31.4%
46-60 years old	23.1%	28.7%	26.0%	30.7%	26.5%
Over 60 years old	4.5%	5.7%	6.7%	9.2%	13.3%

Occupation

Business owner or self-employed	33.5%	35.2%	29.3%	29.9%	32.8%
Upper/Middle management employee	25.1%	32.1%	27.8%	29.0%	23.1%
Auxiliary level employee	19.2%	16.4%	22.6%	19.5%	21.1%
Students	11.8%	7.0%	9.1%	8.7%	8.4%
Retired	5.5%	6.2%	7.0%	7.5%	11.8%
Unemployed / unpaid dom. work	4.8%	3.1%	4.3%	5.4%	2.7%

Annual household income level

€12,000 - €24,000	15.8%	13.5%	12.9%	10.9%	14.9%
€24,001 - €36,000	23.4%	19.5%	16.4%	14.0%	20.4%
€36,001 - €48,000	19.0%	18.7%	17.4%	19.4%	13.7%
€48,001 - €60,000	16.2%	13.8%	16.7%	16.4%	15.7%
€60,001 - €72,000	10.8%	10.9%	12.3%	15.5%	9.0%
€72,001 - €84,000	4.8%	8.2%	6.6%	8.1%	10.1%
More than €84,000	10.0%	15.3%	17.7%	15.7%	16.3%

(*) 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)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	51,712	51,196	50,449	54,585	58,981
- Fuerteventura	5,833	9,866	9,306	6,865	7,445
- Gran Canaria	17,275	16,290	15,297	15,520	17,315
- Tenerife	25,663	27,236	24,776	32,767	33,754
- La Palma	0	0	184	0	0

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	51.5%	49.0%	50.4%	49.7%	50.2%
- Fuerteventura	5.8%	9.4%	9.3%	6.3%	6.3%
- Gran Canaria	17.2%	15.6%	15.3%	14.1%	14.7%
- Tenerife	25.5%	26.0%	24.8%	29.9%	28.7%
- La Palma	0.0%	0.0%	0.2%	0.0%	0.0%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	4.5%	2.2%	5.5%	3.1%	3.1%
Only with partner	47.4%	45.3%	38.4%	42.3%	50.0%
Only with children (under the age of 13)	0.5%	2.4%	1.8%	2.0%	2.1%
Partner + children (under the age of 13)	14.0%	18.5%	19.9%	19.7%	14.0%
Other relatives	7.7%	7.8%	9.8%	8.4%	10.1%
Friends	7.7%	9.6%	5.0%	5.3%	4.3%
Work colleagues	0.3%	0.0%	0.0%	0.0%	0.0%
Other combinations ⁽¹⁾	17.9%	14.1%	19.7%	19.1%	16.4%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	93.8%	93.7%	95.0%	96.9%	96.4%
Average rating (scale 1-10)	8.98	9.07	9.10	9.25	9.21

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	86.8%	79.8%	87.6%	87.7%	85.6%
In love (at least 10 previous visits)	12.5%	12.6%	12.6%	15.2%	17.4%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Ireland	98.4%	97.4%	97.5%	94.7%	94.2%
United Kingdom	1.6%	2.4%	2.3%	5.0%	4.2%
Poland	0.0%	0.0%	0.0%	0.0%	0.7%
Germany	0.0%	0.0%	0.0%	0.0%	0.4%
Norway	0.0%	0.0%	0.0%	0.0%	0.3%
Spanish Mainland	0.0%	0.2%	0.0%	0.3%	0.3%
Netherlands	0.0%	0.0%	0.2%	0.0%	0.0%
Belgium	0.0%	0.0%	0.0%	0.0%	0.0%
Austria	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	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	94.1%	90.0%	93.1%	91.7%	91.6%
Beaches	35.5%	33.4%	34.1%	29.7%	36.9%
Tranquillity/rest/relaxation	36.7%	30.0%	35.2%	34.5%	30.5%
Price	25.8%	26.1%	22.7%	22.4%	21.0%
Scenery	9.5%	10.0%	13.3%	12.8%	11.5%
Nightlife/fun	16.4%	13.8%	13.3%	9.5%	11.4%
Ease of travel	9.9%	10.4%	9.4%	11.6%	10.9%
Suitable destination for children	11.8%	14.4%	17.4%	12.9%	10.9%
Security	4.3%	6.3%	6.3%	12.8%	9.9%
Quality of the environment	6.2%	8.5%	3.4%	5.8%	7.9%
Theme parks	4.7%	5.4%	8.6%	8.8%	7.6%
Visiting new places	8.1%	12.4%	7.1%	9.1%	7.1%
Shopping	3.2%	4.2%	4.2%	4.4%	4.7%
Culture	0.8%	2.8%	1.6%	2.5%	3.1%
Active tourism	2.7%	1.8%	2.6%	1.9%	2.0%
Security against natural catastrophes	0.3%	0.7%	0.4%	2.2%	0.9%

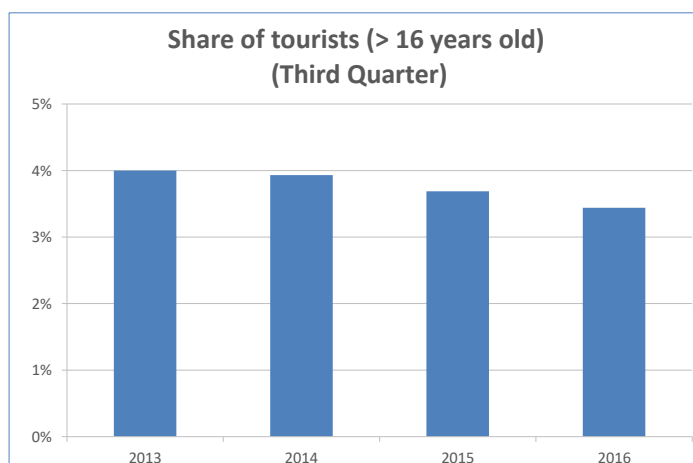
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	70.5%	63.8%	74.6%	70.9%	74.2%
Recommendation by friends or relatives	43.3%	49.1%	42.9%	46.3%	50.6%
The Canary Islands television channel	0.0%	1.0%	0.3%	0.2%	0.3%
Other television or radio channels	0.7%	0.0%	1.0%	0.1%	0.6%
Information in the press/magazines/books	2.6%	2.4%	2.0%	2.1%	2.1%
Attendance at a tourism fair	0.3%	0.0%	0.9%	0.0%	0.7%
Tour Operator's brochure or catalogue	4.8%	9.0%	5.6%	4.4%	3.6%
Recommendation by Travel Agency	9.4%	10.3%	5.7%	6.6%	4.0%
Information obtained via the Internet	20.3%	22.1%	22.5%	20.2%	20.6%
Senior Tourism programme	0.0%	0.0%	0.1%	0.0%	0.0%
Others	5.7%	4.3%	2.8%	3.1%	1.9%

* 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.