

Tourist profile trend (2017)

Ireland: Third Quarter



How many are they and how much do they spend?



How do they book?

	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 lenght 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 (€) (*)					
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%

(*) 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.

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%

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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

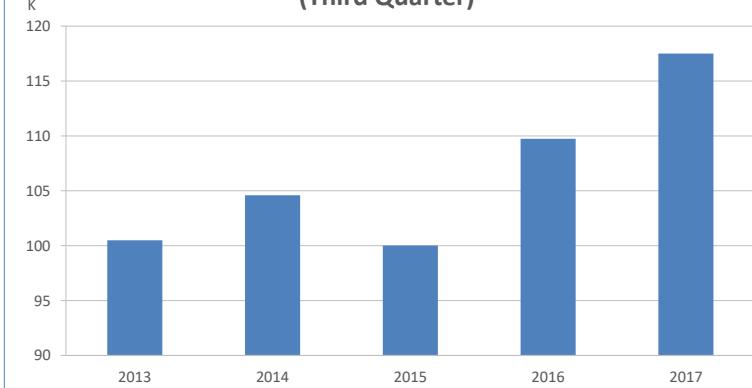
How many are loyal to the destination?

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%

Tourist arrivals trend (> 16 years old) (Third 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.

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

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

