

Tourist profile trend (2016)

Canary Islands: First Quarter



How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	2,780,639	2,739,879	2,942,153	3,000,867	3,386,316
Average daily expenditure (€)	125.76	128.21	127.65	133.56	137.52
. in their place of residence	88.37	89.44	89.21	95.59	99.29
. in the Canary Islands	37.39	38.77	38.44	37.97	38.23
Average length of stay	10.02	10.10	10.25	10.28	10.04
Turnover per tourist (€)	1,116	1,148	1,144	1,183	1,203
Total turnover (> 16 years old) (€m)	3,103	3,146	3,366	3,549	4,073
Share of total turnover	28.5%	28.0%	28.3%	27.3%	27.2%
Share of total tourist	27.7%	26.3%	26.9%	26.5%	25.8%

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

Accommodation (**):	37.30	47.25	46.87	47.52	50.89
- Accommodation	31.02	42.70	41.79	41.65	44.35
- Additional accommodation expenses	6.27	4.54	5.07	5.87	6.54
Transport:	29.10	30.74	28.43	30.20	28.79
- Public transport	5.10	6.45	5.64	5.74	5.90
- Taxi	8.29	7.94	7.70	7.54	7.53
- Car rental	15.71	16.35	15.09	16.92	15.36
Food and drink:	155.15	172.98	172.54	174.31	169.39
- Food purchases at supermarkets	61.73	73.66	76.87	81.61	76.33
- Restaurants	93.42	99.32	95.67	92.70	93.06
Souvenirs:	56.81	58.80	59.58	56.11	50.73
Leisure:	35.66	33.15	32.16	31.98	30.74
- Organized excursions	13.95	12.19	13.33	12.15	12.00
- Leisure, amusement	4.68	3.92	4.11	3.45	3.27
- Trip to other islands	1.74	1.76	1.41	1.51	1.64
- Sporting activities	5.10	5.42	5.36	5.43	5.84
- Cultural activities	1.83	1.77	1.79	2.08	2.14
- Discos and disco-pubs	8.35	8.08	6.17	7.35	5.84
Others:	28.11	25.99	20.98	16.26	15.66
- Wellness	3.58	3.65	3.59	3.13	3.35
- Medical expenses	2.66	2.10	1.98	2.33	1.57
- Other expenses	21.86	20.24	15.42	10.81	10.74

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.5%	0.3%	0.6%	0.5%	0.7%
Between 2 and 7 days	8.7%	8.9%	7.8%	7.2%	6.7%
Between 8 and 15 days	10.7%	10.8%	9.8%	8.7%	9.8%
Between 16 and 30 days	18.7%	18.3%	17.8%	16.2%	16.7%
Between 31 and 90 days	33.7%	33.3%	33.3%	34.9%	35.5%
More than 90 days	27.8%	28.4%	30.8%	32.4%	30.5%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	10.7%	11.9%	12.0%	11.5%	10.0%
Flight and accommodation (room only)	27.8%	30.2%	27.6%	28.0%	27.1%
Flight and accommodation (B&B)	8.1%	7.5%	9.5%	9.2%	9.6%
Flight and accommodation (half board)	20.4%	20.7%	18.4%	18.0%	20.5%
Flight and accommodation (full board)	4.5%	4.4%	4.5%	4.4%	4.1%
Flight and accommodation (all inclusive)	28.6%	25.4%	28.1%	29.0%	28.8%
% Tourists using low-cost airlines	30.8%	37.1%	40.3%	41.3%	46.6%
Other expenses in their place of residence:					
- Car rental	9.5%	11.6%	10.4%	12.0%	11.3%
- Sporting activities	4.9%	5.9%	4.8%	5.3%	5.2%
- Excursions	4.0%	4.1%	4.9%	5.3%	5.3%
- Trip to other islands	1.3%	1.7%	3.2%	2.7%	2.2%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	54.1%	46.8%	49.0%	46.8%	45.6%
- Tour Operator's website	71.4%	77.0%	78.2%	78.2%	78.0%
Accommodation	11.0%	14.1%	13.4%	14.4%	14.6%
- Accommodation's website	78.1%	76.9%	80.2%	80.8%	81.3%
Travel agency (High street)	16.6%	18.3%	16.9%	16.7%	17.1%
Online Travel Agency (OTA)	10.9%	13.6%	12.8%	14.8%	16.0%
No need to book accommodation	7.4%	7.2%	7.8%	7.2%	6.8%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	61.3%	49.0%	51.6%	48.7%	47.2%
- Tour Operator's website	70.0%	75.8%	77.7%	77.3%	76.0%
Airline	15.9%	23.3%	23.2%	24.7%	25.0%
- Airline's website	95.9%	95.0%	96.0%	96.6%	96.6%
Travel agency (High street)	14.3%	17.7%	15.8%	16.0%	16.2%
Online Travel Agency (OTA)	8.6%	10.0%	9.3%	10.7%	11.6%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	5.7%	6.6%	7.0%	6.1%	7.0%
4* Hotel	36.8%	35.6%	34.5%	35.3%	37.2%
1-2-3* Hotel	16.6%	15.1%	15.7%	15.4%	15.4%
Apartment	32.1%	34.1%	31.9%	32.5%	32.1%
Property (privately-owned, friends, family)	5.1%	5.8%	6.6%	6.4%	5.2%
Others	3.6%	2.7%	4.3%	4.3%	3.1%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	50.1%	50.5%	50.4%	50.6%	49.2%
Percentage of women	49.9%	49.5%	49.6%	49.4%	50.8%

Age					
Average age (tourists > 16 years old)	48.6	47.3	48.4	48.8	49.3
Standard deviation	14.8	14.8	14.9	15.0	15.7

Age range (> 16 years old)					
16-24 years old	5.9%	6.7%	6.2%	5.9%	6.2%
25-30 years old	8.8%	9.5%	8.8%	8.9%	9.0%
31-45 years old	26.2%	29.7%	26.8%	25.8%	25.9%
46-60 years old	34.8%	31.4%	34.4%	34.8%	31.0%
Over 60 years old	24.2%	22.7%	23.8%	24.6%	28.0%

Occupation					
Business owner or self-employed	21.8%	23.1%	24.7%	23.4%	23.3%
Upper/Middle management employee	34.2%	32.9%	34.9%	35.1%	32.9%
Auxiliary level employee	14.7%	16.3%	13.5%	14.8%	13.2%
Students	3.8%	5.3%	4.1%	4.0%	4.8%
Retired	23.0%	20.2%	20.9%	20.9%	23.9%
Unemployed / unpaid dom. work	2.5%	2.1%	1.9%	1.8%	1.9%

Annual household income level					
€12,000 - €24,000	16.8%	17.4%	15.9%	16.2%	15.2%
€24,001 - €36,000	20.2%	20.0%	17.8%	17.8%	18.6%
€36,001 - €48,000	17.5%	15.9%	17.5%	18.0%	18.0%
€48,001 - €60,000	14.6%	14.8%	15.5%	15.8%	14.2%
€60,001 - €72,000	10.2%	8.7%	9.7%	9.1%	9.8%
€72,001 - €84,000	6.1%	6.4%	6.3%	6.3%	6.8%
More than €84,000	14.6%	16.8%	17.2%	16.8%	17.5%

(*) 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	427,944	429,077	466,498	483,781	560,886
- Fuerteventura	372,165	366,481	363,967	394,726	473,171
- Gran Canaria	828,230	819,171	895,237	871,881	991,937
- Tenerife	1,085,591	1,059,587	1,150,121	1,179,865	1,261,312
- La Palma	40,340	48,806	36,356	42,548	61,898

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	15.5%	15.8%	16.0%	16.3%	16.7%
- Fuerteventura	13.5%	13.5%	12.5%	13.3%	14.1%
- Gran Canaria	30.1%	30.1%	30.7%	29.3%	29.6%
- Tenerife	39.4%	38.9%	39.5%	39.7%	37.7%
- La Palma	1.5%	1.8%	1.2%	1.4%	1.8%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	9.4%	11.1%	10.5%	10.2%	10.5%
Only with partner	55.1%	53.0%	53.2%	54.7%	53.4%
Only with children (under the age of 13)	0.8%	1.0%	1.2%	0.8%	1.0%
Partner + children (under the age of 13)	8.3%	8.9%	8.2%	8.1%	8.8%
Other relatives	5.0%	5.8%	4.9%	5.5%	5.1%
Friends	7.0%	6.6%	6.6%	6.7%	6.9%
Work colleagues	0.4%	0.6%	0.3%	0.4%	0.3%
Other combinations ⁽¹⁾	14.1%	13.0%	15.0%	13.7%	14.1%

* 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)	91.5%	92.7%	93.9%	90.8%	94.3%
Average rating (scale 1-10)	8.64	8.77	8.80	8.62	8.92

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	82.8%	82.3%	82.4%	82.4%	82.5%
In love (at least 10 previous visits)	19.8%	20.6%	19.2%	20.7%	19.1%

Where are they from?



Ten main source markets	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
United Kingdom	714,238	690,679	769,727	815,450	963,328
Germany	649,510	591,643	657,319	672,698	736,792
Spanish Mainland	257,492	262,053	216,709	231,514	292,274
Sweden	195,244	212,971	230,953	227,528	223,664
Norway	165,656	189,678	197,583	166,737	165,346
Netherlands	107,364	110,281	114,725	105,210	131,526
Denmark	113,882	111,667	120,562	110,410	127,254
France	70,188	75,626	93,412	106,672	119,336
Finland	116,969	118,762	129,896	104,231	105,197
Italy	60,527	50,145	63,672	83,424	98,504

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	93.1%	93.1%	92.8%	91.2%	92.3%
Tranquillity/rest/relaxation	43.0%	39.8%	39.7%	40.2%	37.9%
Beaches	28.2%	30.0%	29.0%	28.0%	29.8%
Scenery	21.0%	21.1%	22.5%	24.3%	23.0%
Price	14.3%	13.4%	13.5%	12.9%	12.2%
Visiting new places	13.1%	11.9%	12.6%	12.4%	12.1%
Security	6.1%	6.1%	5.8%	6.7%	11.1%
Ease of travel	11.5%	11.2%	10.4%	9.8%	9.9%
Quality of the environment	6.0%	6.4%	6.2%	6.4%	7.0%
Active tourism	5.1%	5.6%	6.2%	6.3%	6.9%
Suitable destination for children	5.7%	6.0%	5.6%	5.1%	5.5%
Nightlife/fun	4.4%	5.5%	3.9%	4.1%	4.0%
Culture	2.4%	2.8%	2.5%	2.9%	2.6%
Shopping	3.4%	2.7%	2.7%	3.4%	2.4%
Nautical activities	1.4%	1.7%	2.0%	1.7%	2.0%
Theme parks	1.5%	1.1%	1.1%	1.6%	1.6%

* Multi-choice question

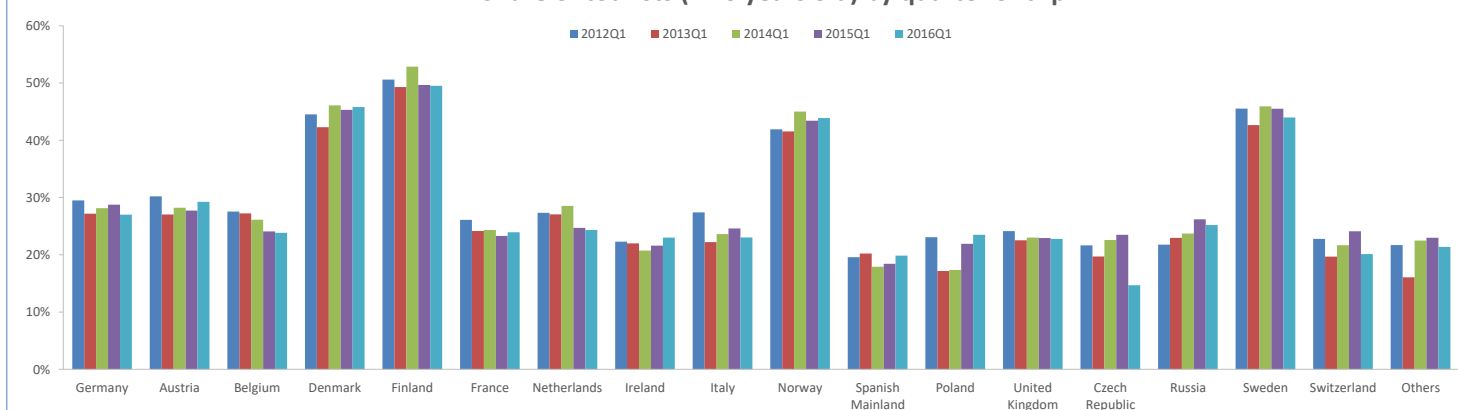
What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	73.9%	71.4%	70.8%	70.5%	69.7%
Recommendation by friends or relatives	30.9%	32.1%	30.7%	31.3%	31.6%
The Canary Islands television channel	0.2%	0.2%	0.3%	0.3%	0.4%
Other television or radio channels	0.5%	0.8%	0.7%	0.7%	0.8%
Information in the press/magazines/books	4.1%	3.9%	4.4%	4.0%	3.6%
Attendance at a tourism fair	0.5%	0.6%	0.6%	0.6%	0.5%
Tour Operator's brochure or catalogue	10.4%	8.1%	7.8%	7.3%	7.2%
Recommendation by Travel Agency	8.9%	7.5%	7.0%	7.4%	8.0%
Information obtained via the Internet	24.5%	25.0%	24.6%	23.3%	24.1%
Senior Tourism programme	0.7%	0.4%	0.4%	0.3%	0.1%
Others	6.4%	6.5%	6.8%	6.7%	6.7%

* Multi-choice question

Share of tourists (> 16 years old) by quarter of trip



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.