

Tourist profile trend (2016)

Canary Islands: Third Quarter



How many are they and how much do they spend?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	2,431,318	2,512,640	2,660,041	2,711,186	3,190,171
Average daily expenditure (€)	120.96	121.22	123.92	135.96	132.88
. in their place of residence	86.02	85.74	88.11	98.85	96.12
. in the Canary Islands	34.95	35.48	35.81	37.11	36.76
Average length of stay	10.10	9.86	9.74	9.77	9.71
Turnover per tourist (€)	1,116	1,086	1,098	1,200	1,174
Total turnover (> 16 years old) (€m)	2,714	2,727	2,921	3,254	3,744
Share of total turnover	24.9%	24.3%	24.5%	25.0%	25.0%
Share of total tourist	24.2%	24.1%	24.3%	24.0%	24.3%

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

Accommodation (**):	39.06	41.64	35.76	44.64	48.83
- Accommodation	33.45	35.95	30.39	37.39	40.99
- Additional accommodation expenses	5.61	5.69	5.37	7.25	7.83
Transport:	29.26	26.51	24.36	27.46	25.92
- Public transport	4.97	4.87	4.37	5.07	5.28
- Taxi	7.31	6.79	6.90	7.19	6.55
- Car rental	16.99	14.85	13.09	15.19	14.09
Food and drink:	133.87	132.06	138.73	142.26	142.03
- Food purchases at supermarkets	58.94	57.93	64.56	65.06	56.89
- Restaurants	74.93	74.13	74.17	77.21	85.14
Souvenirs:	57.98	66.93	63.61	59.95	58.51
Leisure:	51.32	46.32	47.38	46.86	44.13
- Organized excursions	21.60	20.88	21.44	20.74	20.08
- Leisure, amusement	7.53	6.80	7.16	7.65	6.56
- Trip to other islands	2.50	2.23	1.93	1.83	2.40
- Sporting activities	5.32	5.75	5.68	5.48	5.71
- Cultural activities	2.38	2.24	2.24	2.42	2.52
- Discos and disco-pubs	11.99	8.41	8.92	8.74	6.86
Others:	21.07	18.76	13.67	14.24	13.24
- Wellness	3.54	2.97	2.57	3.06	3.16
- Medical expenses	1.35	1.15	1.10	1.31	1.88
- Other expenses	16.18	14.64	9.99	9.88	8.20

How far in advance do they book their trip?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.5%	0.6%	0.5%	0.6%	0.6%
Between 2 and 7 days	8.8%	7.8%	9.0%	6.2%	5.5%
Between 8 and 15 days	10.5%	11.2%	9.8%	9.4%	7.8%
Between 16 and 30 days	15.9%	15.8%	14.7%	14.5%	12.7%
Between 31 and 90 days	28.4%	29.1%	27.5%	28.9%	29.2%
More than 90 days	35.9%	35.5%	38.6%	40.5%	44.1%

What do they book at their place of residence?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	9.9%	10.0%	9.4%	9.3%	8.3%
Flight and accommodation (room only)	22.4%	23.8%	22.8%	22.5%	24.0%
Flight and accommodation (B&B)	5.1%	5.4%	5.5%	6.0%	6.5%
Flight and accommodation (half board)	21.5%	20.4%	19.3%	18.9%	20.7%
Flight and accommodation (full board)	4.0%	3.7%	4.0%	3.9%	4.4%
Flight and accommodation (all inclusive)	37.1%	36.7%	39.1%	39.4%	36.2%
% Tourists using low-cost airlines	37.3%	46.9%	46.4%	49.3%	49.3%
Other expenses in their place of residence:					
- Car rental	9.4%	10.8%	10.4%	10.9%	12.0%
- Sporting activities	5.8%	6.1%	5.8%	5.8%	5.6%
- Excursions	5.3%	5.9%	6.3%	6.5%	6.4%
- Trip to other islands	1.0%	1.3%	1.2%	0.9%	1.2%

How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Accommodation booking					
Tour Operator	39.5%	39.1%	41.8%	40.7%	38.6%
- Tour Operator's website	71.2%	75.9%	76.4%	77.8%	79.8%
Accommodation	12.0%	13.7%	12.3%	13.5%	14.2%
- Accommodation's website	80.9%	82.3%	80.4%	81.4%	84.6%
Travel agency (High street)	28.5%	24.7%	24.3%	23.6%	24.5%
Online Travel Agency (OTA)	12.7%	15.5%	14.9%	15.3%	16.5%
No need to book accommodation	7.4%	7.0%	6.8%	6.9%	6.2%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight booking					
Tour Operator	42.6%	41.3%	44.5%	43.3%	40.4%
- Tour Operator's website	69.3%	73.2%	74.3%	75.7%	76.9%
Airline	20.6%	24.7%	21.6%	22.8%	25.0%
- Airline's website	94.6%	95.6%	95.1%	95.8%	95.7%
Travel agency (High street)	26.6%	22.4%	22.3%	22.0%	22.8%
Online Travel Agency (OTA)	10.3%	11.6%	11.6%	11.9%	11.8%

Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	7.2%	7.2%	7.6%	7.8%	7.6%
4* Hotel	40.1%	39.0%	39.5%	41.3%	41.2%
1-2-3* Hotel	16.8%	15.7%	16.9%	15.7%	13.8%
Apartment	28.4%	30.5%	28.3%	27.9%	30.7%
Property (privately-owned, friends, family)	6.5%	6.4%	6.4%	6.2%	5.0%
Others	1.0%	1.2%	1.4%	1.1%	1.8%

Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Gender					
Percentage of men	49.0%	48.8%	48.9%	49.2%	47.5%
Percentage of women	51.0%	51.2%	51.1%	50.8%	52.5%
Age					
Average age (tourists > 16 years old)	38.4	38.0	38.2	39.3	41.8
Standard deviation	12.5	12.4	12.7	12.6	14.4
Age range (> 16 years old)					
16-24 years old	16.4%	16.3%	17.1%	14.9%	13.6%
25-30 years old	16.2%	17.7%	17.0%	14.9%	13.4%
31-45 years old	37.1%	36.6%	35.6%	38.0%	32.8%
46-60 years old	26.0%	25.9%	25.9%	27.3%	29.0%
Over 60 years old	4.3%	3.5%	4.3%	4.9%	11.1%
Occupation					
Business owner or self-employed	22.9%	23.7%	23.8%	23.9%	23.2%
Upper/Middle management employee	39.5%	39.2%	40.2%	40.3%	39.0%
Auxiliary level employee	21.1%	20.0%	20.4%	20.2%	18.3%
Students	9.3%	10.3%	9.2%	8.5%	7.9%
Retired	4.0%	3.3%	3.6%	4.1%	9.3%
Unemployed / unpaid dom. work	3.1%	3.5%	2.9%	2.9%	2.4%
Annual household income level					
€12,000 - €24,000	23.2%	21.5%	22.6%	20.8%	20.7%
€24,001 - €36,000	20.8%	21.6%	22.3%	19.5%	20.4%
€36,001 - €48,000	17.6%	16.5%	15.9%	16.5%	16.1%
€48,001 - €60,000	13.0%	14.9%	13.6%	14.2%	14.7%
€60,001 - €72,000	8.0%	7.9%	7.7%	9.2%	9.3%
€72,001 - €84,000	5.3%	5.2%	4.7%	5.4%	5.0%
More than €84,000	12.0%	12.4%	13.0%	14.3%	13.9%

(*) 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)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	465,423	491,243	508,699	544,296	604,857
- Fuerteventura	385,948	411,931	440,855	447,593	484,107
- Gran Canaria	592,788	625,351	656,504	675,982	847,744
- Tenerife	931,210	933,438	997,622	987,323	1,184,832
- La Palma	39,502	33,517	35,685	38,837	46,789

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	19.3%	19.7%	19.3%	20.2%	19.1%
- Fuerteventura	16.0%	16.5%	16.7%	16.6%	15.3%
- Gran Canaria	24.5%	25.1%	24.9%	25.1%	26.8%
- Tenerife	38.6%	37.4%	37.8%	36.6%	37.4%
- La Palma	1.6%	1.3%	1.4%	1.4%	1.5%

Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	6.4%	8.1%	7.7%	7.5%	6.6%
Only with partner	43.3%	41.7%	41.1%	40.1%	40.3%
Only with children (under the age of 13)	1.8%	2.0%	2.2%	2.1%	2.4%
Partner + children (under the age of 13)	16.2%	15.0%	15.9%	17.8%	16.9%
Other relatives	6.1%	6.4%	5.9%	6.6%	6.4%
Friends	6.1%	6.5%	6.5%	5.1%	5.4%
Work colleagues	0.3%	0.3%	0.3%	0.2%	0.1%
Other combinations ⁽¹⁾	19.8%	20.0%	20.4%	20.6%	21.8%

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

How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	93.1%	93.2%	93.7%	93.6%	94.5%
Average rating (scale 1-10)	8.82	8.82	8.85	8.89	8.93

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	68.7%	69.1%	68.5%	69.3%	70.3%
In love (at least 10 previous visits)	10.0%	11.2%	10.3%	10.9%	10.9%

Where are they from?



Ten main source markets	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
United Kingdom	760,059	809,529	900,701	937,317	1,111,515
Germany	497,377	472,311	526,595	493,995	591,310
Spanish Mainland	458,202	442,146	426,386	446,585	496,792
Netherlands	109,361	106,389	102,452	114,586	150,406
France	76,237	87,817	105,482	127,370	139,687
Italy	71,235	74,711	75,782	93,488	122,775
Ireland	85,892	100,483	104,588	100,012	109,738
Belgium	64,575	64,902	68,680	79,051	92,959
Switzerland	48,649	55,911	55,235	52,483	64,929
Austria	26,106	61,261	25,633	28,390	39,730

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	88.2%	86.1%	86.5%	85.9%	86.5%
Beaches	41.6%	41.1%	41.5%	40.3%	40.3%
Tranquillity/rest/relaxation	39.4%	37.3%	36.0%	35.8%	34.8%
Scenery	19.0%	19.2%	21.7%	22.0%	21.2%
Visiting new places	19.5%	17.3%	18.4%	17.8%	18.2%
Price	17.1%	15.8%	16.7%	15.4%	13.3%
Security	3.6%	4.0%	3.7%	7.7%	11.2%
Suitable destination for children	9.8%	9.4%	10.9%	10.9%	10.4%
Ease of travel	6.5%	5.6%	5.5%	5.7%	7.2%
Quality of the environment	5.8%	6.0%	5.9%	6.6%	6.0%
Theme parks	4.4%	4.5%	5.3%	5.0%	5.0%
Nightlife/fun	6.7%	5.9%	5.5%	4.9%	3.9%
Active tourism	3.2%	4.3%	3.6%	3.9%	3.6%
Culture	2.8%	2.5%	2.5%	2.9%	2.8%
Nautical activities	2.4%	3.2%	2.8%	2.6%	2.7%
Shopping	3.5%	2.5%	3.0%	3.1%	2.3%

* Multi-choice question

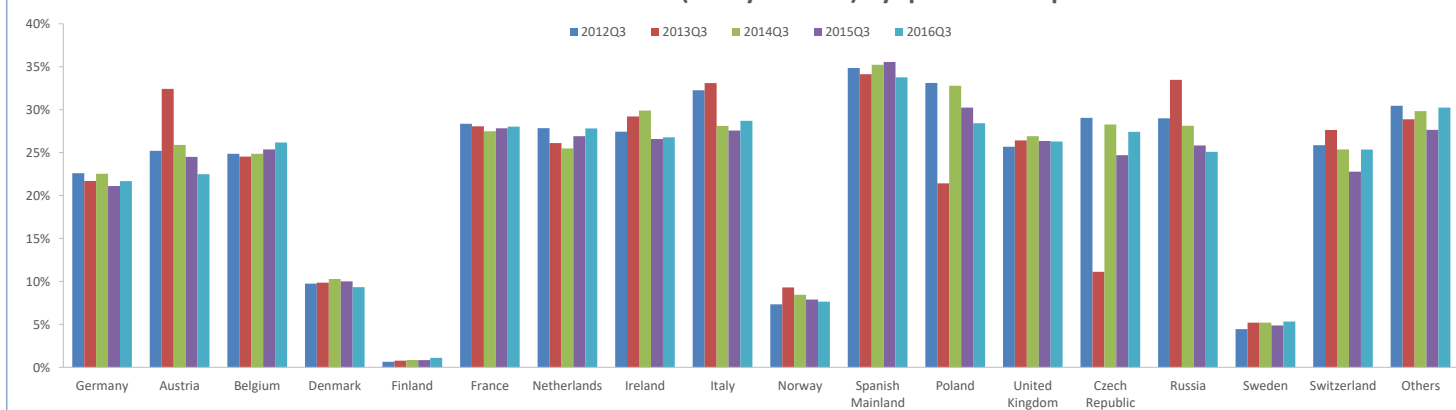
What did motivate them to come?



Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	56.7%	55.3%	54.8%	55.9%	56.0%
Recommendation by friends or relatives	39.7%	38.2%	38.6%	38.1%	38.2%
The Canary Islands television channel	0.7%	0.5%	0.5%	0.4%	0.3%
Other television or radio channels	1.1%	1.0%	0.8%	1.0%	1.0%
Information in the press/magazines/books	4.9%	4.1%	4.1%	3.9%	4.1%
Attendance at a tourism fair	0.5%	0.6%	0.6%	0.5%	0.5%
Tour Operator's brochure or catalogue	13.2%	10.9%	11.4%	11.0%	9.4%
Recommendation by Travel Agency	14.3%	13.2%	12.6%	12.6%	12.5%
Information obtained via the Internet	27.8%	28.0%	29.5%	29.4%	28.7%
Senior Tourism programme	0.2%	0.1%	0.1%	0.1%	0.2%
Others	5.7%	6.9%	6.4%	5.4%	5.4%

* 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.