

Tourist profile trend (2016)

La Palma: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	40,340	48,806	36,356	42,548	61,898
Average daily expenditure (€)	110.70	134.10	111.42	124.97	127.44
. in their place of residence	75.72	93.44	75.22	90.13	90.00
. in the Canary Islands	34.98	40.66	36.20	34.84	37.43
Average length of stay	12.42	10.59	12.05	10.83	10.72
Turnover per tourist (€)	1,158	1,274	1,189	1,180	1,225
Total turnover (> 16 years old) (€m)	46.7	62.2	43.2	50.2	75.8
Share of total turnover	28.7%	37.0%	27.8%	27.6%	30.5%
Share of total tourist	27.8%	34.0%	26.2%	26.0%	27.9%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	58.05	48.08	79.15	48.07	46.91
- Accommodation	40.56	44.50	76.72	38.80	38.46
- Additional accommodation expenses	17.49	3.58	2.42	9.27	8.45
Transport:	48.47	42.37	38.63	53.82	62.39
- Public transport	8.93	3.23	4.70	8.37	5.55
- Taxi	3.84	3.10	9.64	5.44	3.58
- Car rental	35.70	36.05	24.30	40.01	53.25
Food and drink:	203.29	264.53	217.53	173.36	195.11
- Food purchases at supermarkets	94.87	128.42	84.71	67.85	88.46
- Restaurants	108.42	136.11	132.82	105.51	106.65
Souvenirs:	36.54	31.20	40.49	34.51	32.40
Leisure:	31.65	21.08	26.71	19.90	22.05
- Organized excursions	15.57	10.42	11.30	11.09	13.20
- Leisure, amusement	3.39	3.75	0.17	1.86	1.40
- Trip to other islands	1.67	1.08	1.68	1.45	0.77
- Sporting activities	6.12	3.30	10.37	3.00	5.48
- Cultural activities	3.21	1.36	1.09	1.44	0.65
- Discos and disco-pubs	1.69	1.17	2.11	1.06	0.56
Others:	21.49	14.16	14.46	21.42	15.04
- Wellness	1.81	2.60	0.98	1.90	1.46
- Medical expenses	1.16	1.37	0.65	0.70	1.26
- Other expenses	18.52	10.20	12.83	18.82	12.32

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	1.2%	0.1%	0.1%	0.2%	0.6%
Between 2 and 7 days	4.2%	7.2%	6.6%	3.0%	5.9%
Between 8 and 15 days	14.3%	10.9%	8.4%	6.9%	6.4%
Between 16 and 30 days	18.5%	23.2%	24.6%	19.5%	13.7%
Between 31 and 90 days	32.3%	36.5%	33.0%	35.5%	39.8%
More than 90 days	29.5%	22.1%	27.2%	34.9%	33.5%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	17.5%	12.7%	19.2%	13.2%	13.4%
Flight and accommodation (room only)	41.3%	41.8%	36.6%	37.3%	37.0%
Flight and accommodation (B&B)	8.1%	6.6%	16.8%	12.6%	16.5%
Flight and accommodation (half board)	22.7%	26.2%	12.3%	25.8%	19.7%
Flight and accommodation (full board)	0.7%	3.9%	3.8%	1.7%	0.7%
Flight and accommodation (all inclusive)	9.7%	8.7%	11.3%	9.4%	12.8%
% Tourists using low-cost airlines	16.3%	18.0%	27.0%	26.8%	38.9%
Other expenses in their place of residence:					
- Car rental	39.7%	45.3%	42.8%	41.3%	42.3%
- Sporting activities	2.4%	3.9%	2.0%	5.2%	4.6%
- Excursions	5.9%	4.1%	5.8%	5.8%	9.7%
- Trip to other islands	3.8%	0.5%	3.7%	1.9%	2.0%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	36.0%	48.2%	30.4%	41.0%	34.2%
- Tour Operator's website	73.9%	70.9%	63.0%	83.3%	66.5%
Accommodation	15.5%	11.8%	15.6%	19.2%	15.1%
- Accommodation's website	82.5%	69.8%	75.0%	84.5%	89.8%
Travel agency (High street)	19.6%	17.5%	21.4%	16.3%	20.4%
Online Travel Agency (OTA)	20.5%	19.0%	21.7%	18.4%	23.4%
No need to book accommodation	8.3%	3.5%	10.9%	5.1%	6.9%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	42.4%	48.8%	32.2%	39.1%	33.4%
- Tour Operator's website	68.0%	68.9%	70.1%	76.3%	67.4%
Airline	23.8%	19.9%	25.7%	31.1%	30.8%
- Airline's website	95.9%	98.2%	99.8%	97.2%	97.8%
Travel agency (High street)	18.5%	18.4%	24.3%	18.3%	22.6%
Online Travel Agency (OTA)	15.2%	12.9%	17.9%	11.5%	13.2%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
4* Hotel	30.5%	34.2%	26.8%	33.3%	33.1%
1-2-3* Hotel	7.5%	7.2%	13.7%	8.9%	13.2%
Apartment	54.7%	54.1%	49.9%	50.9%	44.6%
Property (privately-owned, friends, family)	6.6%	3.3%	7.8%	4.8%	6.0%
Others	0.6%	1.1%	1.8%	2.0%	3.1%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	49.5%	44.3%	49.0%	49.2%	38.6%
Percentage of women	50.5%	55.7%	51.0%	50.8%	61.4%

Age					
Average age (tourists > 16 years old)	51.7	48.1	49.7	52.8	50.4
Standard deviation	12.8	13.5	14.5	13.1	13.7

Age range (> 16 years old)					
16-24 years old	0.4%	5.2%	2.4%	1.5%	3.6%
25-30 years old	7.2%	8.9%	8.0%	5.6%	7.4%
31-45 years old	23.5%	26.3%	32.7%	19.3%	24.6%
46-60 years old	39.5%	39.7%	30.3%	43.2%	37.9%
Over 60 years old	29.4%	20.0%	26.6%	30.4%	26.6%

Occupation					
Business owner or self-employed	21.6%	17.5%	23.1%	21.0%	20.7%
Upper/Middle management employee	38.9%	44.5%	32.9%	43.1%	42.6%
Auxiliary level employee	9.0%	15.2%	11.9%	6.8%	9.8%
Students	1.2%	2.1%	2.6%	1.5%	2.7%
Retired	25.2%	16.2%	26.4%	27.1%	20.7%
Unemployed / unpaid dom. work	4.2%	4.6%	3.1%	0.4%	3.6%

Annual household income level					
€12,000 - €24,000	14.3%	12.8%	16.3%	15.5%	15.5%
€24,001 - €36,000	16.5%	24.4%	22.8%	15.6%	14.8%
€36,001 - €48,000	21.1%	15.5%	16.4%	15.1%	18.5%
€48,001 - €60,000	16.9%	11.8%	11.8%	15.8%	14.3%
€60,001 - €72,000	9.1%	8.9%	8.2%	12.0%	7.2%
€72,001 - €84,000	6.1%	7.4%	7.9%	4.9%	9.7%
More than €84,000	16.1%	19.3%	16.6%	21.2%	20.0%

(*) 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.

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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	11.0%	8.3%	16.3%	12.6%	10.5%
Only with partner	73.1%	68.3%	62.2%	63.1%	66.7%
Only with children (under the age of 13)	0.4%	0.0%	0.6%	0.8%	1.2%
Partner + children (under the age of 13)	1.6%	3.2%	4.1%	3.9%	5.8%
Other relatives	2.4%	9.9%	1.0%	4.0%	3.8%
Friends	4.5%	3.4%	6.8%	5.3%	4.1%
Work colleagues	1.1%	1.2%	0.6%	0.4%	0.2%
Other combinations ⁽¹⁾	6.0%	5.6%	8.4%	9.9%	7.7%

* 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)	95.5%	98.0%	95.5%	94.1%	98.5%
Average rating (scale 1-10)	8.99	8.92	9.09	8.91	9.21

How many are loyal to the destination?

Repeat tourists of the island	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	46.2%	44.2%	40.8%	43.3%	44.6%
In love (at least 10 previous visits)	7.1%	2.8%	7.7%	5.3%	5.5%

Where are they from?



Ten main source markets	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Germany	18,759	15,336	17,279	17,834	26,559
Spanish Mainland	8,507	8,630	3,864	5,131	8,907
United Kingdom	4,476	4,208	5,694	7,607	8,816
Netherlands	4,189	4,000	3,784	4,087	5,370
Austria	960	412	308	3,195	3,700
Belgium	1,463	1,988	1,272	1,158	3,214
France	614	1,144	571	847	1,663
Finland	0	6,304	204	390	620
Italy	118	1,239	92	799	600
Switzerland	777	29	478	755	528

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	89.6%	85.8%	87.1%	83.2%	85.0%
Scenery	67.8%	61.9%	61.1%	68.0%	64.4%
Tranquillity/rest/relaxation	42.4%	41.9%	37.0%	37.9%	40.2%
Active tourism	35.6%	37.4%	27.0%	39.9%	35.5%
Quality of the environment	12.2%	11.1%	10.4%	12.4%	15.3%
Visiting new places	9.5%	7.3%	9.5%	16.2%	10.8%
Beaches	7.1%	5.8%	7.5%	3.6%	7.9%
Price	5.6%	2.9%	5.8%	4.7%	4.8%
Ease of travel	3.0%	3.8%	1.6%	5.0%	4.3%
Security	4.1%	7.2%	1.6%	2.9%	4.1%
Rural tourism	2.0%	1.8%	5.8%	3.6%	3.4%
Culture	1.0%	3.6%	2.2%	1.1%	3.0%
Suitable destination for children	0.6%	1.4%	1.6%	1.1%	1.6%
Nautical activities	1.1%	0.7%	2.7%	1.1%	0.9%
Nightlife/fun	0.0%	0.8%	0.0%	0.6%	0.4%
Health-related tourism	0.4%	0.3%	0.2%	0.0%	0.4%

* Multi-choice question

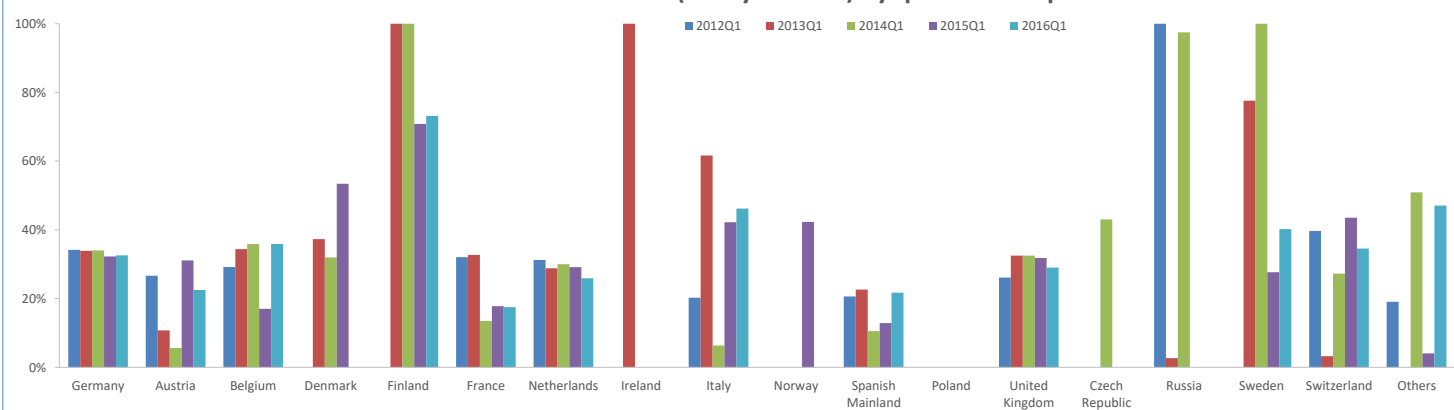
What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	73.8%	71.6%	66.0%	74.5%	69.0%
Recommendation by friends or relatives	29.9%	35.3%	31.7%	27.8%	35.7%
The Canary Islands television channel	0.5%	0.0%	0.0%	0.2%	0.0%
Other television or radio channels	1.1%	0.8%	0.7%	3.6%	3.0%
Information in the press/magazines/books	11.5%	13.1%	5.0%	10.8%	6.1%
Attendance at a tourism fair	0.0%	0.2%	1.3%	0.3%	0.5%
Tour Operator's brochure or catalogue	5.3%	5.5%	6.8%	7.3%	3.9%
Recommendation by Travel Agency	5.9%	5.4%	7.8%	3.1%	6.7%
Information obtained via the Internet	26.5%	31.3%	14.2%	25.7%	18.1%
Senior Tourism programme	0.2%	0.0%	0.5%	0.0%	0.2%
Others	4.6%	4.9%	6.9%	5.1%	8.0%

* 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.