

# Tourist profile trend (2016)

## La Palma: Third Quarter



### How many are they and how much do they spend?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	39,502	33,517	35,685	38,837	46,789
Average daily expenditure (€)	115.20	110.62	116.23	108.40	115.85
. in their place of residence	79.05	75.25	83.31	75.72	86.86
. in the Canary Islands	36.15	35.37	32.92	32.68	28.99
Average length of stay	11.20	11.23	10.21	11.62	11.48
Turnover per tourist (€)	1,171	1,126	1,066	1,087	1,172
Total turnover (> 16 years old) (€m)	46.3	37.7	38.0	42.2	54.8
Share of total turnover	28.5%	22.5%	24.5%	23.2%	22.1%
Share of total tourist	27.2%	23.4%	25.7%	23.8%	21.1%

Expenditure in the Canary Islands per tourist and trip (€) (*)					
<b>Accommodation (**):</b>	70.77	67.26	42.65	40.45	27.73
- Accommodation	63.16	57.99	37.56	35.56	22.79
- Additional accommodation expenses	7.61	9.27	5.10	4.90	4.94
<b>Transport:</b>	53.96	50.17	49.45	55.41	52.60
- Public transport	5.57	6.47	7.86	3.62	5.11
- Taxi	4.11	4.45	3.47	4.03	4.93
- Car rental	44.28	39.25	38.12	47.76	42.56
<b>Food and drink:</b>	177.77	185.40	154.63	173.29	153.60
- Food purchases at supermarkets	60.19	74.06	63.58	65.08	73.34
- Restaurants	117.58	111.34	91.05	108.21	80.26
<b>Souvenirs:</b>	37.68	47.37	34.51	32.81	37.54
<b>Leisure:</b>	27.10	27.17	27.90	30.52	33.48
- Organized excursions	16.46	15.16	15.54	20.06	22.57
- Leisure, amusement	2.08	2.16	1.68	1.90	2.60
- Trip to other islands	3.12	3.50	4.25	1.89	3.42
- Sporting activities	3.16	4.39	3.15	2.89	2.26
- Cultural activities	1.33	0.82	1.45	2.01	2.07
- Discos and disco-pubs	0.95	1.15	1.82	1.76	0.57
<b>Others:</b>	14.20	9.32	22.23	12.65	18.45
- Wellness	2.06	2.13	2.19	3.25	1.31
- Medical expenses	0.76	0.89	0.91	1.14	1.01
- Other expenses	11.38	6.30	19.13	8.26	16.13

### How far in advance do they book their trip?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.8%	0.4%	0.1%	0.0%	0.2%
Between 2 and 7 days	9.2%	7.1%	7.9%	6.5%	2.9%
Between 8 and 15 days	11.1%	14.0%	17.0%	9.3%	8.4%
Between 16 and 30 days	18.6%	16.4%	16.0%	15.4%	12.4%
Between 31 and 90 days	30.9%	29.5%	30.5%	32.4%	36.5%
More than 90 days	29.4%	32.7%	28.6%	36.4%	39.6%

### What do they book at their place of residence?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	17.9%	12.2%	11.3%	17.5%	14.6%
Flight and accommodation (room only)	28.0%	37.4%	34.0%	35.4%	24.6%
Flight and accommodation (B&B)	12.2%	9.2%	7.0%	5.1%	6.2%
Flight and accommodation (half board)	24.9%	28.4%	23.9%	19.7%	29.4%
Flight and accommodation (full board)	1.0%	3.0%	3.8%	1.4%	0.8%
Flight and accommodation (all inclusive)	16.0%	9.7%	20.1%	20.9%	24.5%
<b>% Tourists using low-cost airlines</b>	23.9%	26.1%	37.0%	36.3%	32.8%
<b>Other expenses in their place of residence:</b>					
- Car rental	36.7%	33.3%	45.0%	35.3%	31.8%
- Sporting activities	3.2%	3.0%	5.4%	3.4%	3.1%
- Excursions	7.7%	8.0%	13.2%	7.8%	8.3%
- Trip to other islands	3.2%	2.7%	3.2%	1.6%	1.1%

### How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	31.1%	22.3%	31.0%	30.8%	25.6%
- Tour Operator's website	81.4%	74.9%	84.5%	83.5%	85.2%
<b>Accommodation</b>	15.7%	23.5%	15.6%	14.8%	16.7%
- Accommodation's website	90.4%	89.6%	83.2%	79.1%	90.0%
<b>Travel agency (High street)</b>	27.4%	31.1%	21.9%	23.8%	31.1%
<b>Online Travel Agency (OTA)</b>	17.9%	17.2%	25.6%	19.1%	18.9%
<b>No need to book accommodation</b>	8.0%	5.8%	5.9%	11.5%	7.7%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	32.7%	30.2%	29.8%	34.4%	31.7%
- Tour Operator's website	75.9%	76.0%	79.6%	78.7%	86.1%
<b>Airline</b>	26.3%	29.7%	26.1%	23.0%	25.9%
- Airline's website	99.5%	93.6%	99.6%	96.8%	99.3%
<b>Travel agency (High street)</b>	26.0%	26.7%	21.4%	23.7%	27.6%
<b>Online Travel Agency (OTA)</b>	15.0%	13.4%	22.7%	18.9%	14.8%

### Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
4* Hotel	39.3%	30.9%	31.7%	34.2%	44.9%
1-2-3* Hotel	8.8%	12.9%	8.7%	5.7%	10.3%
Apartment	42.5%	48.3%	53.0%	48.3%	34.7%
Property (privately-owned, friends, family)	7.5%	5.5%	5.2%	10.6%	7.7%
Others	1.9%	2.4%	1.4%	1.2%	2.4%

### Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Gender</b>					
Percentage of men	40.1%	41.3%	51.8%	51.5%	53.5%
Percentage of women	59.9%	58.7%	48.2%	48.5%	46.5%
<b>Age</b>					
Average age (tourists > 16 years old)	44.4	45.3	43.0	44.5	45.3
Standard deviation	10.7	12.1	11.4	12.8	12.8
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	4.9%	5.7%	4.5%	6.5%	6.4%
25-30 years old	6.8%	9.3%	11.5%	10.9%	9.9%
31-45 years old	37.7%	32.0%	42.3%	34.4%	34.3%
46-60 years old	46.9%	44.9%	36.4%	38.3%	36.8%
Over 60 years old	3.8%	8.1%	5.3%	9.8%	12.6%
<b>Occupation</b>					
Business owner or self-employed	17.2%	17.6%	17.9%	15.6%	21.3%
Upper/Middle management employee	57.9%	52.6%	54.1%	51.2%	52.2%
Auxiliary level employee	15.3%	15.2%	16.2%	15.6%	12.3%
Students	4.6%	4.7%	3.7%	7.6%	3.4%
Retired	3.8%	6.8%	4.9%	8.5%	8.3%
Unemployed / unpaid dom. work	1.3%	3.1%	3.2%	1.4%	2.5%
<b>Annual household income level</b>					
€12,000 - €24,000	13.0%	16.7%	19.2%	17.8%	15.0%
€24,001 - €36,000	13.6%	19.1%	17.1%	21.3%	15.3%
€36,001 - €48,000	20.1%	17.2%	17.3%	17.3%	21.0%
€48,001 - €60,000	18.9%	12.5%	21.4%	10.8%	23.2%
€60,001 - €72,000	12.1%	8.8%	7.5%	10.2%	8.2%
€72,001 - €84,000	8.4%	14.2%	4.7%	7.0%	5.2%
More than €84,000	13.9%	11.6%	12.8%	15.5%	12.2%

(\*) 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.

## Tourist profile trend (2016)

### La Palma: Third Quarter

#### 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	6.3%	7.6%	7.9%	8.0%	7.2%
Only with partner	49.9%	44.6%	49.0%	52.2%	49.1%
Only with children (under the age of 13)	0.8%	2.0%	1.5%	2.4%	2.5%
Partner + children (under the age of 13)	15.8%	12.5%	14.1%	11.9%	17.3%
Other relatives	4.5%	3.2%	4.1%	4.9%	5.1%
Friends	3.9%	9.6%	5.0%	3.9%	1.4%
Work colleagues	0.9%	0.0%	1.9%	0.0%	0.0%
Other combinations <sup>(1)</sup>	17.8%	20.4%	16.6%	16.6%	17.3%

\* 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)	98.0%	97.0%	96.6%	98.4%	98.6%
Average rating (scale 1-10)	9.11	9.07	9.08	9.28	9.26

#### How many are loyal to the destination?

Repeat tourists of the island	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	27.9%	39.3%	32.3%	37.5%	29.8%
In love (at least 10 previous visits)	4.4%	9.4%	5.4%	6.3%	6.5%

#### Where are they from?



Ten main source markets	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Germany	12,121	8,001	7,828	10,547	14,495
Spanish Mainland	15,687	14,110	16,400	13,522	13,279
Netherlands	3,361	4,040	3,317	3,300	5,208
United Kingdom	4,694	2,169	2,323	4,946	3,450
France	728	1,620	1,870	1,367	2,751
Austria	737	692	1,751	1,764	2,139
Belgium	969	1,323	984	1,625	1,973
Czech Republic	212	0	0	0	1,482
Poland	212	0	0	0	800
Italy	194	287	380	645	253

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	77.4%	65.9%	69.2%	75.4%	75.6%
Scenery	61.2%	60.7%	60.0%	66.4%	55.5%
Tranquillity/rest/relaxation	40.7%	41.8%	46.8%	45.8%	43.8%
Active tourism	28.0%	26.7%	23.8%	26.3%	25.3%
Visiting new places	22.4%	19.9%	18.6%	18.0%	20.0%
Quality of the environment	16.1%	12.8%	15.0%	16.9%	17.4%
Beaches	15.3%	15.7%	17.8%	12.1%	15.9%
Security	1.9%	2.1%	2.0%	2.7%	8.4%
Price	7.5%	5.4%	5.9%	8.7%	4.9%
Suitable destination for children	4.3%	1.8%	2.1%	4.4%	2.9%
Culture	1.1%	1.1%	3.2%	0.6%	2.6%
Rural tourism	1.4%	1.4%	2.1%	1.6%	2.2%
Ease of travel	2.2%	1.5%	2.4%	2.0%	1.6%
Nautical activities	0.7%	0.4%	1.0%	0.9%	1.0%
Security against natural catastrophes	0.0%	0.0%	0.0%	0.0%	0.5%
Health-related tourism	0.7%	0.0%	0.0%	0.5%	0.4%

\* Multi-choice question

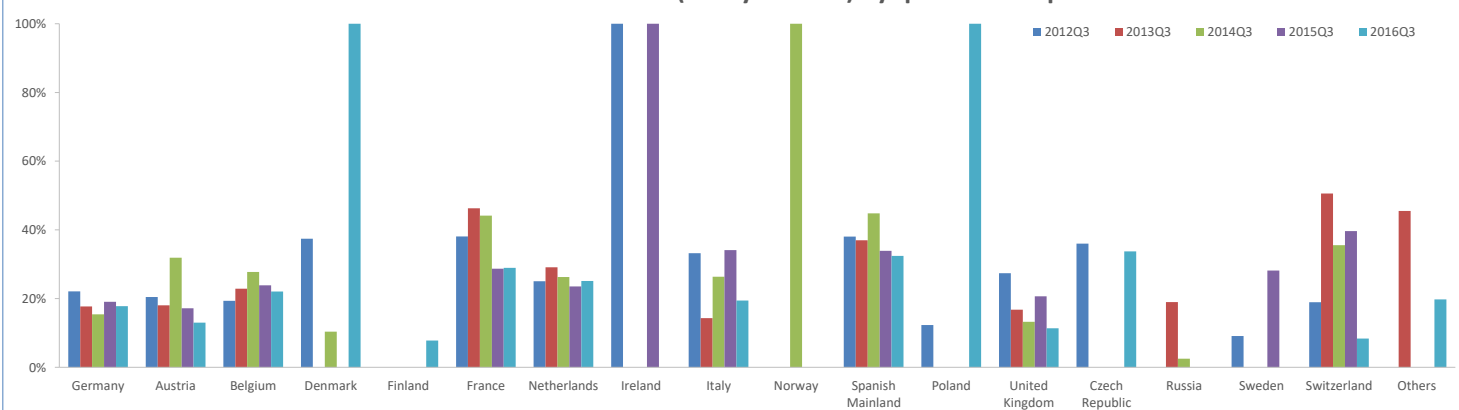
#### What did motivate them to come?



Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	60.7%	55.4%	63.0%	61.9%	59.4%
Recommendation by friends or relatives	36.0%	34.5%	33.8%	37.6%	34.0%
The Canary Islands television channel	0.1%	0.2%	0.3%	0.4%	0.0%
Other television or radio channels	0.3%	0.6%	2.5%	4.9%	4.6%
Information in the press/magazines/books	10.7%	6.8%	8.3%	6.3%	8.9%
Attendance at a tourism fair	0.9%	0.5%	0.8%	0.4%	2.5%
Tour Operator's brochure or catalogue	8.1%	6.1%	6.6%	7.5%	6.2%
Recommendation by Travel Agency	10.5%	7.7%	4.4%	5.5%	8.6%
Information obtained via the Internet	30.4%	27.6%	28.5%	32.3%	29.4%
Senior Tourism programme	0.0%	0.5%	0.0%	0.0%	0.0%
Others	6.2%	11.4%	11.3%	6.3%	3.6%

\* 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.