

Tourist profile trend (2016)

Canary Islands: Spanish Mainland market



How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	1,315,010	1,295,533	1,210,646	1,256,064	1,471,736
Average daily expenditure (€)	122.77	123.38	127.42	131.45	131.48
. in their place of residence	75.97	77.76	81.29	85.73	84.74
. in the Canary Islands	46.79	45.61	46.13	45.72	46.73
Average length of stay	7.30	7.43	7.49	7.41	7.48
Turnover per tourist (€)	773	767	795	813	828
Total turnover (> 16 years old) (€m)	1,016	994	962	1,021	1,219
Spanish turnover: year on year change	--	-2.2%	-3.2%	6.1%	19.4%
Spanish tourist arrivals: year on year change	--	-1.5%	-6.6%	3.8%	17.2%

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

Accommodation (**):	48.31	45.68	44.40	43.69	51.13
- Accommodation	39.77	38.66	36.30	35.46	43.61
- Additional accommodation expenses	8.55	7.02	8.10	8.24	7.52
Transport:	36.02	33.66	36.10	34.96	34.17
- Public transport	5.52	5.59	6.03	6.12	5.83
- Taxi	6.33	5.40	6.36	5.24	5.16
- Car rental	24.17	22.67	23.71	23.61	23.18
Food and drink:	96.98	106.48	113.58	113.76	118.19
- Food purchases at supermarkets	29.64	40.67	44.73	44.57	40.04
- Restaurants	67.34	65.81	68.85	69.19	78.15
Souvenirs:	58.07	56.91	52.58	46.86	48.59
Leisure:	39.59	32.66	35.56	34.14	34.47
- Organized excursions	16.27	12.40	12.97	12.10	12.72
- Leisure, amusement	5.75	4.91	5.36	6.91	5.82
- Trip to other islands	2.43	2.51	2.40	2.34	2.91
- Sporting activities	3.48	3.22	3.76	3.38	3.44
- Cultural activities	3.49	2.36	2.82	2.48	2.38
- Discos and disco-pubs	8.18	7.26	8.25	6.93	7.20
Others:	15.83	11.61	12.77	12.94	12.02
- Wellness	2.44	2.13	2.08	2.42	2.00
- Medical expenses	0.89	0.72	0.72	0.75	0.67
- Other expenses	12.50	8.76	9.97	9.77	9.35

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.8%	0.9%	1.0%	0.8%	0.8%
Between 2 and 7 days	14.7%	14.7%	14.0%	11.8%	10.0%
Between 8 and 15 days	16.2%	17.1%	14.3%	12.1%	11.8%
Between 16 and 30 days	23.3%	24.0%	23.5%	22.5%	20.1%
Between 31 and 90 days	32.3%	31.5%	34.2%	36.9%	37.4%
More than 90 days	12.7%	11.7%	12.9%	15.9%	20.0%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	18.6%	18.7%	19.8%	21.5%	19.8%
Flight and accommodation (room only)	14.6%	18.3%	19.0%	17.9%	20.1%
Flight and accommodation (B&B)	8.5%	8.6%	9.0%	9.0%	8.7%
Flight and accommodation (half board)	23.5%	21.4%	21.2%	20.8%	20.6%
Flight and accommodation (full board)	9.9%	8.1%	7.7%	7.2%	7.6%
Flight and accommodation (all inclusive)	24.9%	24.9%	23.3%	23.7%	23.1%
% Tourists using low-cost airlines	37.3%	56.2%	56.6%	57.2%	62.1%
Other expenses in their place of residence:					
- Car rental	19.2%	22.1%	23.6%	23.7%	26.0%
- Sporting activities	1.7%	2.0%	1.7%	2.1%	2.4%
- Excursions	4.0%	4.6%	5.4%	5.5%	6.3%
- Trip to other islands	1.3%	1.5%	1.6%	1.5%	2.0%

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	14.6%	13.7%	13.7%	12.5%	12.3%
- Tour Operator's website	69.8%	77.2%	76.8%	74.8%	78.7%
Accommodation	19.0%	21.1%	20.7%	19.8%	21.0%
- Accommodation's website	79.7%	80.2%	80.7%	82.5%	81.9%
Travel agency (High street)	36.4%	29.6%	29.8%	29.7%	28.2%
Online Travel Agency (OTA)	17.4%	22.0%	20.9%	20.6%	22.5%
No need to book accommodation	12.6%	13.6%	15.0%	17.4%	16.0%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	20.4%	19.1%	18.6%	18.1%	17.5%
- Tour Operator's website	68.1%	75.6%	76.9%	75.0%	77.8%
Airline	30.5%	35.8%	36.5%	38.7%	40.0%
- Airline's website	97.2%	97.4%	97.6%	98.0%	97.9%
Travel agency (High street)	35.7%	28.9%	29.0%	28.7%	28.0%
Online Travel Agency (OTA)	13.5%	16.2%	15.8%	14.4%	14.6%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	10.2%	9.0%	9.4%	8.8%	8.6%
4* Hotel	45.0%	41.5%	39.6%	39.4%	38.0%
1-2-3* Hotel	15.7%	14.1%	15.1%	14.0%	14.2%
Apartment	17.1%	21.5%	21.0%	19.9%	22.8%
Property (privately-owned, friends, family)	11.1%	12.7%	13.5%	16.5%	14.0%
Others	1.0%	1.1%	1.5%	1.4%	2.4%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	53.8%	52.5%	55.4%	53.1%	53.0%
Percentage of women	46.2%	47.5%	44.6%	46.9%	47.0%
Age					
Average age (tourists > 16 years old)	39.4	38.1	39.1	39.6	41.2
Standard deviation	12.4	11.5	11.6	12.0	12.9
Age range (> 16 years old)					
16-24 years old	8.3%	9.2%	9.0%	9.7%	7.9%
25-30 years old	18.2%	19.2%	17.5%	16.2%	14.6%
31-45 years old	46.1%	48.8%	46.9%	44.9%	44.1%
46-60 years old	19.9%	17.9%	21.4%	23.7%	24.2%
Over 60 years old	7.5%	5.0%	5.2%	5.5%	9.2%
Occupation					
Business owner or self-employed	20.0%	19.5%	21.8%	21.0%	20.0%
Upper/Middle management employee	34.0%	34.8%	35.4%	36.1%	36.3%
Auxiliary level employee	28.6%	27.7%	25.0%	25.9%	26.2%
Students	5.9%	7.9%	7.1%	7.5%	6.0%
Retired	6.5%	4.5%	5.0%	4.7%	7.8%
Unemployed / unpaid dom. work	5.0%	5.5%	5.7%	4.8%	3.7%
Annual household income level					
€12,000 - €24,000	31.8%	32.8%	31.3%	31.2%	29.1%
€24,001 - €36,000	26.0%	27.1%	27.4%	25.8%	27.1%
€36,001 - €48,000	16.0%	15.2%	15.3%	16.6%	16.6%
€48,001 - €60,000	10.1%	10.5%	11.1%	10.4%	11.4%
€60,001 - €72,000	6.1%	5.1%	5.7%	5.5%	6.2%
€72,001 - €84,000	3.5%	3.4%	3.1%	3.2%	3.2%
More than €84,000	6.6%	5.9%	6.1%	7.3%	6.4%

(*) 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.

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Canary Islands: Spanish Mainland market



Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	249,662	231,724	206,912	191,537	218,286
- Fuerteventura	95,154	110,663	95,696	109,376	111,928
- Gran Canaria	352,460	399,994	383,540	398,534	484,482
- Tenerife	569,307	509,437	480,387	506,292	606,002
- La Palma	41,229	38,141	36,612	39,886	40,972

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	19.1%	18.0%	17.2%	15.4%	14.9%
- Fuerteventura	7.3%	8.6%	8.0%	8.8%	7.7%
- Gran Canaria	27.0%	31.0%	31.9%	32.0%	33.1%
- Tenerife	43.5%	39.5%	39.9%	40.6%	41.5%
- La Palma	3.2%	3.0%	3.0%	3.2%	2.8%

Who do they come with?



	2012	2013	2014	2015	2016
Unaccompanied	15.6%	19.1%	20.0%	18.2%	16.6%
Only with partner	46.0%	44.6%	42.2%	40.2%	39.8%
Only with children (under the age of 13)	1.1%	1.0%	1.1%	1.4%	1.7%
Partner + children (under the age of 13)	12.3%	12.2%	13.4%	15.1%	16.5%
Other relatives	4.8%	4.5%	3.9%	4.7%	4.3%
Friends	7.0%	6.9%	6.5%	6.5%	6.8%
Work colleagues	1.2%	1.0%	1.1%	1.1%	0.9%
Other combinations ⁽¹⁾	12.2%	10.6%	11.7%	12.7%	13.5%

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

How do they rate the destination?



Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	93.2%	93.4%	93.8%	93.1%	94.4%
Average rating (scale 1-10)	8.78	8.76	8.80	8.83	8.89

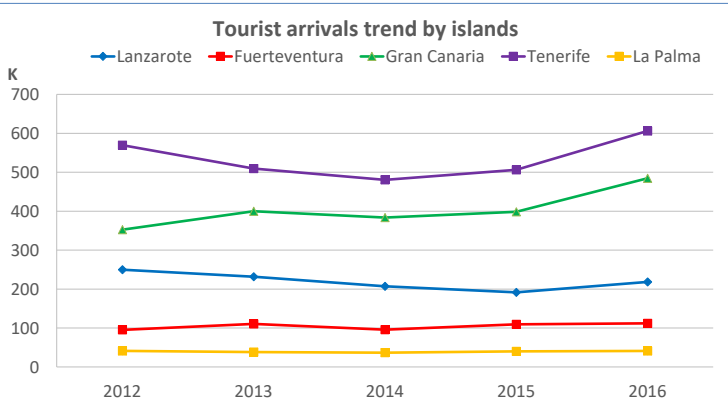
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	77.1%	78.2%	78.7%	78.6%	79.8%
In love (at least 10 previous visits)	13.7%	13.8%	14.6%	16.1%	16.1%

Where does the flight come from?



Ten main origin countries	2012	2013	2014	2015	2016
Spanish Mainland	1,303,010	1,287,235	1,202,031	1,250,447	1,465,215
United Kingdom	329	642	765	623	1,815
Italy	0	358	0	152	208
Switzerland	473	0	793	149	201
Netherlands	168	0	140	38	185
Russia	0	0	0	0	184
Poland	0	0	116	0	139
Belgium	379	0	527	327	136
Germany	1,627	516	493	1,237	53
Finland	0	0	0	202	0



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	2012	2013	2014	2015	2016
Climate/sun	72.7%	74.1%	71.1%	71.2%	69.7%
Beaches	36.5%	37.9%	36.6%	35.6%	36.3%
Tranquillity/rest/relaxation	36.2%	35.4%	35.1%	34.6%	32.6%
Scenery	25.3%	25.8%	27.5%	28.8%	29.2%
Visiting new places	21.2%	17.9%	19.3%	19.3%	19.3%
Price	13.7%	11.6%	10.6%	9.8%	8.7%
Quality of the environment	6.9%	6.7%	6.6%	7.5%	8.1%
Suitable destination for children	6.2%	6.5%	6.8%	7.3%	7.6%
Theme parks	2.9%	3.0%	2.9%	3.4%	4.8%
Active tourism	3.1%	3.6%	3.5%	4.4%	4.5%
Nightlife/fun	2.9%	2.9%	2.7%	2.8%	2.9%
Nautical activities	1.9%	2.0%	2.6%	2.6%	2.5%
Security	1.6%	1.7%	1.8%	2.6%	2.3%
Ease of travel	2.5%	2.4%	2.4%	2.3%	2.0%
Culture	2.0%	1.8%	2.1%	2.2%	1.8%
Shopping	3.4%	2.9%	2.8%	2.2%	1.6%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	58.6%	58.0%	58.7%	59.0%	59.2%
Recommendation by friends or relatives	38.1%	38.6%	38.4%	38.9%	36.3%
The Canary Islands television channel	0.8%	0.4%	0.3%	0.3%	0.2%
Other television or radio channels	1.1%	0.9%	1.0%	1.0%	0.7%
Information in the press/magazines/books	4.6%	3.8%	4.0%	3.6%	3.4%
Attendance at a tourism fair	0.5%	0.7%	0.6%	0.7%	0.3%
Tour Operator's brochure or catalogue	3.2%	2.4%	2.2%	2.3%	1.2%
Recommendation by Travel Agency	10.3%	7.6%	7.3%	7.6%	6.2%
Information obtained via the Internet	22.6%	22.6%	23.2%	22.6%	20.8%
Senior Tourism programme	3.0%	1.8%	1.3%	0.9%	1.4%
Others	12.3%	13.1%	14.3%	13.5%	13.2%

* Multi-choice question

