

Tourist profile trend (2016)

Spanish Mainland: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	260,645	275,386	259,204	267,982	310,568
Average daily expenditure (€)	122.33	123.90	133.68	129.23	136.77
. in their place of residence	72.69	76.30	83.72	80.25	85.65
. in the Canary Islands	49.64	47.60	49.96	48.98	51.12
Average length of stay	6.65	6.87	7.13	7.09	6.93
Turnover per tourist (€)	717	730	771	763	818
Total turnover (> 16 years old) (€m)	187	201	200	204	254
Share of total turnover	18.4%	20.2%	20.8%	20.0%	20.8%
Share of total tourist	19.8%	21.3%	21.4%	21.3%	21.1%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	52.40	39.52	41.36	40.52	57.22
- Accommodation	44.42	34.63	34.08	33.88	50.13
- Additional accommodation expenses	7.99	4.89	7.28	6.64	7.10
Transport:	33.19	33.12	36.43	35.13	35.07
- Public transport	6.92	5.73	5.44	5.29	5.97
- Taxi	5.91	6.27	6.86	5.34	5.97
- Car rental	20.36	21.12	24.13	24.50	23.13
Food and drink:	94.23	107.62	118.86	121.62	123.00
- Food purchases at supermarkets	33.99	42.20	42.15	47.80	42.77
- Restaurants	60.24	65.43	76.71	73.82	80.23
Souvenirs:	51.64	59.18	49.47	52.89	50.58
Leisure:	34.01	33.81	34.58	25.51	31.60
- Organized excursions	11.41	11.76	11.03	8.16	10.19
- Leisure, amusement	4.34	5.32	5.38	4.06	5.14
- Trip to other islands	2.97	1.68	1.87	1.62	2.48
- Sporting activities	3.83	3.31	3.97	3.52	2.87
- Cultural activities	4.43	2.33	2.83	2.21	2.72
- Discos and disco-pubs	7.03	9.42	9.49	5.95	8.20
Others:	16.40	11.76	17.93	14.65	13.40
- Wellness	2.61	2.14	1.71	1.80	2.44
- Medical expenses	1.11	0.62	0.73	0.97	0.59
- Other expenses	12.68	9.00	15.50	11.88	10.38

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	1.3%	0.9%	0.6%	0.9%	0.5%
Between 2 and 7 days	16.7%	14.4%	16.5%	12.9%	10.0%
Between 8 and 15 days	19.0%	19.1%	14.5%	14.4%	13.0%
Between 16 and 30 days	27.2%	22.6%	24.8%	23.4%	21.9%
Between 31 and 90 days	28.2%	33.4%	30.8%	33.8%	36.8%
More than 90 days	7.7%	9.6%	12.9%	14.6%	17.7%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	20.4%	19.9%	22.2%	27.1%	24.2%
Flight and accommodation (room only)	15.0%	18.2%	18.4%	17.6%	20.0%
Flight and accommodation (B&B)	10.6%	9.4%	10.6%	10.1%	9.9%
Flight and accommodation (half board)	21.6%	20.4%	19.9%	18.9%	18.8%
Flight and accommodation (full board)	9.7%	9.2%	7.7%	6.7%	8.0%
Flight and accommodation (all inclusive)	22.6%	22.9%	21.2%	19.6%	19.1%
% Tourists using low-cost airlines	46.7%	59.7%	56.7%	60.2%	69.5%
Other expenses in their place of residence:					
- Car rental	20.0%	23.6%	21.7%	22.2%	26.7%
- Sporting activities	1.3%	1.4%	1.5%	1.4%	2.4%
- Excursions	2.9%	3.3%	3.7%	4.3%	6.1%
- Trip to other islands	1.2%	1.0%	1.3%	1.3%	1.4%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	14.3%	13.9%	13.2%	11.7%	12.1%
- Tour Operator's website	72.9%	76.2%	77.2%	75.1%	75.2%
Accommodation	21.4%	20.8%	21.9%	19.3%	22.7%
- Accommodation's website	81.1%	84.9%	82.6%	77.9%	81.0%
Travel agency (High street)	33.6%	27.5%	29.0%	27.1%	23.1%
Online Travel Agency (OTA)	18.2%	22.2%	19.2%	20.0%	22.9%
No need to book accommodation	12.5%	15.5%	16.7%	21.9%	19.1%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	17.6%	19.5%	19.0%	18.1%	18.5%
- Tour Operator's website	69.2%	75.7%	76.7%	74.8%	76.8%
Airline	36.0%	39.0%	38.5%	42.3%	43.8%
- Airline's website	96.5%	97.0%	96.5%	98.3%	98.4%
Travel agency (High street)	33.1%	26.9%	27.6%	26.1%	23.9%
Online Travel Agency (OTA)	13.3%	14.6%	14.8%	13.6%	13.9%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	10.3%	8.2%	8.6%	6.8%	8.4%
4* Hotel	43.2%	40.5%	38.9%	34.6%	33.7%
1-2-3* Hotel	16.8%	14.9%	16.9%	16.1%	14.4%
Apartment	16.8%	20.5%	18.6%	18.7%	23.7%
Property (privately-owned, friends, family)	12.1%	14.7%	15.4%	21.6%	17.1%
Others	0.8%	1.3%	1.5%	2.2%	2.7%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	54.6%	55.6%	56.4%	55.2%	54.2%
Percentage of women	45.4%	44.4%	43.6%	44.8%	45.8%

Age					
Average age (tourists > 16 years old)	39.4	38.9	39.7	41.1	41.4
Standard deviation	11.9	11.2	11.3	12.2	12.5

Age range (> 16 years old)					
16-24 years old	6.2%	5.9%	5.6%	6.6%	5.7%
25-30 years old	17.9%	18.9%	16.2%	15.5%	15.4%
31-45 years old	48.5%	49.7%	51.1%	44.7%	44.3%
46-60 years old	21.2%	20.4%	21.7%	25.5%	25.5%
Over 60 years old	6.2%	5.0%	5.4%	7.6%	9.2%

Occupation					
Business owner or self-employed	23.8%	21.6%	23.0%	20.2%	22.0%
Upper/Middle management employee	32.7%	34.0%	34.3%	35.5%	36.7%
Auxiliary level employee	30.6%	27.5%	27.1%	28.2%	26.6%
Students	3.1%	5.0%	3.7%	4.9%	3.2%
Retired	4.1%	5.1%	5.4%	5.9%	8.3%
Unemployed / unpaid dom. work	5.8%	6.7%	6.5%	5.3%	3.2%

Annual household income level					
€12,000 - €24,000	35.2%	33.9%	30.8%	32.6%	31.3%
€24,001 - €36,000	25.4%	27.3%	27.4%	26.0%	27.3%
€36,001 - €48,000	16.1%	15.1%	15.7%	15.3%	15.9%
€48,001 - €60,000	9.3%	11.2%	11.5%	9.9%	11.6%
€60,001 - €72,000	4.8%	4.9%	5.7%	6.7%	4.6%
€72,001 - €84,000	2.7%	2.9%	2.9%	2.4%	3.0%
More than €84,000	6.5%	4.6%	6.0%	7.1%	6.2%

(*) 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.

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Spanish Mainland: Fourth Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	44,711	46,619	40,156	38,340	46,378
- Fuerteventura	15,022	21,118	18,773	21,126	22,080
- Gran Canaria	74,450	91,334	82,993	85,601	96,191
- Tenerife	116,274	110,026	109,974	110,177	136,705
- La Palma	7,874	5,738	6,113	10,852	7,358

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	17.3%	17.0%	15.6%	14.4%	15.0%
- Fuerteventura	5.8%	7.7%	7.3%	7.9%	7.2%
- Gran Canaria	28.8%	33.2%	32.2%	32.2%	31.2%
- Tenerife	45.0%	40.0%	42.6%	41.4%	44.3%
- La Palma	3.0%	2.1%	2.4%	4.1%	2.4%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	18.0%	23.7%	23.8%	22.1%	17.5%
Only with partner	46.4%	46.6%	41.3%	40.8%	41.8%
Only with children (under the age of 13)	0.7%	0.5%	0.7%	0.9%	1.1%
Partner + children (under the age of 13)	7.4%	8.5%	12.4%	11.7%	13.1%
Other relatives	5.1%	3.8%	4.4%	5.5%	5.0%
Friends	7.1%	6.1%	5.7%	4.7%	6.5%
Work colleagues	1.3%	0.9%	1.3%	1.3%	1.3%
Other combinations ⁽¹⁾	13.9%	9.9%	10.5%	13.0%	13.7%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	93.8%	94.1%	94.7%	93.4%	93.9%
Average rating (scale 1-10)	8.79	8.75	8.83	8.82	8.87

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	77.8%	81.0%	77.8%	82.0%	83.4%
In love (at least 10 previous visits)	15.4%	15.5%	15.5%	21.5%	19.1%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Spanish Mainland	99.2%	99.0%	99.6%	99.8%	99.4%
United Kingdom	0.0%	0.2%	0.0%	0.1%	0.1%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.1%
Russia	0.0%	0.0%	0.0%	0.0%	0.1%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	0.0%	0.1%	0.0%	0.1%	0.0%
Norway	0.0%	0.0%	0.0%	0.1%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	74.6%	75.6%	70.5%	73.2%	71.9%
Tranquillity/rest/relaxation	33.2%	34.3%	34.5%	34.9%	31.6%
Beaches	32.2%	34.9%	30.8%	32.8%	31.6%
Scenery	23.8%	25.1%	26.0%	26.1%	27.9%
Visiting new places	18.1%	17.9%	15.5%	14.0%	15.8%
Quality of the environment	5.9%	6.1%	7.1%	8.4%	8.0%
Price	12.3%	10.0%	10.7%	8.2%	7.8%
Suitable destination for children	4.1%	3.9%	6.9%	5.7%	5.9%
Theme parks	2.4%	2.9%	2.4%	2.3%	4.3%
Active tourism	3.5%	3.8%	3.6%	4.8%	4.1%
Security	1.6%	2.0%	2.3%	2.9%	2.9%
Nautical activities	2.8%	2.2%	2.5%	2.6%	2.6%
Ease of travel	3.1%	1.8%	2.9%	2.8%	2.2%
Nightlife/fun	2.8%	3.0%	2.3%	1.6%	2.1%
Shopping	3.9%	2.7%	3.4%	2.5%	1.9%
Culture	1.3%	1.6%	1.7%	1.6%	1.2%

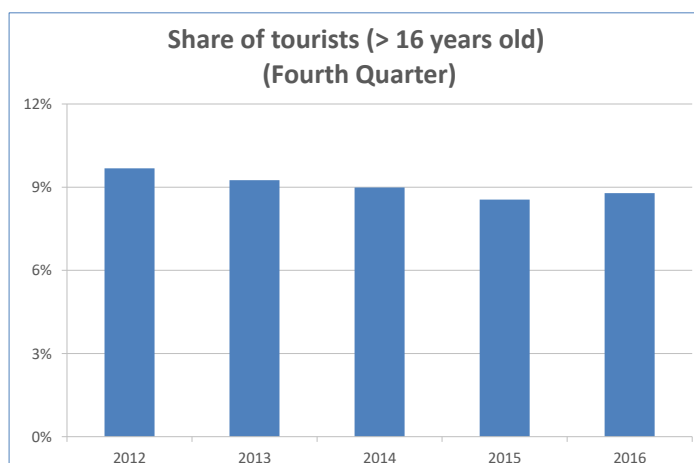
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	55.3%	60.1%	58.0%	61.2%	60.9%
Recommendation by friends or relatives	38.4%	37.3%	35.5%	36.5%	33.5%
The Canary Islands television channel	0.5%	0.4%	0.3%	0.1%	0.2%
Other television or radio channels	0.5%	0.6%	1.1%	0.6%	0.6%
Information in the press/magazines/books	4.8%	4.2%	5.0%	2.6%	2.6%
Attendance at a tourism fair	0.7%	0.5%	0.8%	0.3%	0.4%
Tour Operator's brochure or catalogue	2.5%	1.5%	1.1%	1.5%	1.2%
Recommendation by Travel Agency	10.6%	5.9%	6.4%	5.4%	4.0%
Information obtained via the Internet	19.8%	19.6%	20.4%	19.0%	18.4%
Senior Tourism programme	0.5%	2.1%	1.2%	0.7%	1.4%
Others	17.0%	14.4%	17.5%	16.9%	14.5%

* Multi-choice question



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.