

## Tourist profile trend (2016)

### Canary Islands: Portuguese market



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



#### How do they book?



|  | 2012   | 2013   | 2014   | 2015   | 2016   |
|--|--------|--------|--------|--------|--------|
| Tourist arrivals (> 16 years old)                | 51,753 | 57,617 | 40,147 | 38,785 | 63,636 |
| Average daily expenditure (€)                    | 112.22 | 108.94 | 109.24 | 124.32 | 117.20 |
| - in their place of residence                    | 81.36  | 71.49  | 78.15  | 89.91  | 85.18  |
| - in the Canary Islands                          | 30.85  | 37.45  | 31.08  | 34.41  | 32.02  |
| Average length of stay                           | 9.29   | 7.53   | 9.04   | 7.39   | 7.24   |
| Turnover per tourist (€)                         | 821    | 746    | 791    | 786    | 800    |
| Total turnover (> 16 years old) (€m)             | 42     | 43     | 32     | 30     | 51     |
| Portuguese turnover: year on year change         | --     | 1.2%   | -26.1% | -4.0%  | 66.9%  |
| Portuguese tourist arrivals: year on year change | --     | 11.3%  | -30.3% | -3.4%  | 64.1%  |

| Accommodation booking                | 2012  | 2013  | 2014  | 2015  | 2016  |
|--------------------------------------|-------|-------|-------|-------|-------|
| <b>Tour Operator</b>                 | 23.1% | 21.9% | 17.8% | 20.0% | 18.6% |
| - Tour Operator's website            | 54.4% | 74.8% | 71.0% | 70.7% | 70.2% |
| <b>Accommodation</b>                 | 11.3% | 21.2% | 14.2% | 10.8% | 14.7% |
| - Accommodation's website            | 87.8% | 78.3% | 75.1% | 87.3% | 94.3% |
| <b>Travel agency (High street)</b>   | 49.9% | 37.1% | 51.9% | 48.9% | 49.6% |
| <b>Online Travel Agency (OTA)</b>    | 10.0% | 13.1% | 7.7%  | 9.8%  | 12.7% |
| <b>No need to book accommodation</b> | 5.7%  | 6.7%  | 8.4%  | 10.4% | 4.3%  |

#### Expenditure in the Canary Islands per tourist and trip (€) <sup>(\*)</sup>

|                                       |       |       |       |       |       |
|---------------------------------------|-------|-------|-------|-------|-------|
| <b>Accommodation <sup>(**)</sup>:</b> | 24.44 | 55.59 | 39.18 | 40.55 | 48.73 |
| - Accommodation                       | 19.81 | 50.06 | 35.49 | 32.88 | 41.48 |
| - Additional accommodation expenses   | 4.63  | 5.53  | 3.68  | 7.67  | 7.25  |
| <b>Transport:</b>                     | 41.21 | 25.18 | 23.79 | 18.98 | 14.61 |
| - Public transport                    | 26.22 | 4.81  | 3.95  | 4.35  | 1.52  |
| - Taxi                                | 2.59  | 1.62  | 2.63  | 2.01  | 2.07  |
| - Car rental                          | 12.40 | 18.75 | 17.21 | 12.62 | 11.02 |
| <b>Food and drink:</b>                | 69.52 | 88.51 | 86.73 | 79.50 | 85.94 |
| - Food purchases at supermarkets      | 42.89 | 35.43 | 55.24 | 52.14 | 30.84 |
| - Restaurants                         | 26.63 | 53.08 | 31.49 | 27.36 | 55.10 |
| <b>Souvenirs:</b>                     | 69.91 | 62.00 | 58.92 | 58.46 | 54.40 |
| <b>Leisure:</b>                       | 46.08 | 23.68 | 26.33 | 20.66 | 16.29 |
| - Organized excursions                | 19.31 | 6.12  | 10.72 | 11.13 | 8.65  |
| - Leisure, amusement                  | 4.88  | 4.03  | 2.46  | 2.70  | 2.22  |
| - Trip to other islands               | 1.35  | 0.58  | 5.53  | 1.54  | 0.97  |
| - Sporting activities                 | 3.72  | 5.21  | 4.53  | 1.40  | 1.47  |
| - Cultural activities                 | 1.38  | 0.83  | 1.01  | 1.23  | 0.61  |
| - Discos and disco-pubs               | 15.45 | 6.91  | 2.08  | 2.66  | 2.35  |
| <b>Others:</b>                        | 11.60 | 12.20 | 6.18  | 5.49  | 7.00  |
| - Wellness                            | 0.18  | 0.95  | 0.70  | 0.55  | 0.70  |
| - Medical expenses                    | 0.91  | 0.64  | 0.23  | 0.17  | 1.59  |
| - Other expenses                      | 10.51 | 10.62 | 5.24  | 4.76  | 4.71  |

| Flight booking                     | 2012  | 2013  | 2014  | 2015  | 2016  |
|------------------------------------|-------|-------|-------|-------|-------|
| <b>Tour Operator</b>               | 30.5% | 29.8% | 24.1% | 21.4% | 25.9% |
| - Tour Operator's website          | 54.4% | 73.0% | 72.2% | 63.3% | 58.5% |
| <b>Airline</b>                     | 16.7% | 28.6% | 22.1% | 21.7% | 19.0% |
| - Airline's website                | 82.8% | 82.7% | 93.7% | 94.5% | 83.8% |
| <b>Travel agency (High street)</b> | 46.5% | 35.4% | 47.9% | 51.2% | 43.0% |
| <b>Online Travel Agency (OTA)</b>  | 6.3%  | 6.2%  | 5.9%  | 5.8%  | 12.0% |

#### Where do they stay?



|   | 2012  | 2013  | 2014  | 2015  | 2016  |
|---|-------|-------|-------|-------|-------|
| 5* Hotel                                    | 6.9%  | 9.6%  | 8.5%  | 6.2%  | 5.7%  |
| 4* Hotel                                    | 53.2% | 41.2% | 47.0% | 51.6% | 41.6% |
| 1-2-3* Hotel                                | 21.1% | 20.1% | 23.0% | 19.6% | 29.3% |
| Apartment                                   | 16.3% | 23.2% | 10.1% | 11.8% | 17.1% |
| Property (privately-owned, friends, family) | 2.5%  | 5.2%  | 9.4%  | 9.9%  | 4.4%  |
| Others                                      | 0.0%  | 0.7%  | 1.9%  | 0.9%  | 2.0%  |

#### Who are they?



| Gender              | 2012  | 2013  | 2014  | 2015  | 2016  |
|---------------------|-------|-------|-------|-------|-------|
| Percentage of men   | 57.4% | 64.6% | 53.1% | 54.7% | 52.1% |
| Percentage of women | 42.6% | 35.4% | 46.9% | 45.3% | 47.9% |

| Age                                   | 2012 | 2013 | 2014 | 2015 | 2016 |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 38.6 | 39.1 | 38.7 | 37.9 | 41.4 |
| Standard deviation                    | 12.5 | 10.5 | 11.2 | 10.8 | 12.9 |

| Age range (> 16 years old) | 2012  | 2013  | 2014  | 2015  | 2016  |
|----------------------------|-------|-------|-------|-------|-------|
| 16-24 years old            | 12.7% | 5.5%  | 7.9%  | 8.6%  | 5.6%  |
| 25-30 years old            | 19.3% | 16.7% | 21.8% | 18.2% | 18.6% |
| 31-45 years old            | 39.7% | 55.4% | 44.6% | 50.2% | 40.0% |
| 46-60 years old            | 22.7% | 17.3% | 21.6% | 19.7% | 23.8% |
| Over 60 years old          | 5.6%  | 5.1%  | 4.1%  | 3.2%  | 11.9% |

| Occupation                       | 2012  | 2013  | 2014  | 2015  | 2016  |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed  | 26.9% | 27.0% | 24.3% | 26.1% | 23.3% |
| Upper/Middle management employee | 43.8% | 46.6% | 53.8% | 49.5% | 46.0% |
| Auxiliary level employee         | 17.0% | 13.0% | 7.6%  | 13.3% | 14.8% |
| Students                         | 4.5%  | 3.9%  | 5.2%  | 7.2%  | 1.3%  |
| Retired                          | 4.9%  | 5.3%  | 5.4%  | 2.6%  | 11.0% |
| Unemployed / unpaid dom. work    | 3.0%  | 4.2%  | 3.7%  | 1.1%  | 3.6%  |

| Annual household income level | 2012  | 2013  | 2014  | 2015  | 2016  |
|-------------------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000             | 46.8% | 38.3% | 56.6% | 50.4% | 51.9% |
| €24,001 - €36,000             | 22.4% | 30.1% | 20.1% | 24.7% | 29.8% |
| €36,001 - €48,000             | 13.3% | 17.5% | 9.2%  | 6.3%  | 10.1% |
| €48,001 - €60,000             | 8.0%  | 8.2%  | 5.2%  | 8.7%  | 2.0%  |
| €60,001 - €72,000             | 0.8%  | 5.0%  | 3.7%  | 7.2%  | 2.8%  |
| €72,001 - €84,000             | 1.9%  | 0.0%  | 0.8%  | 1.8%  | 0.6%  |
| More than €84,000             | 6.9%  | 1.0%  | 4.3%  | 0.9%  | 2.8%  |

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



|                         | 2012  | 2013  | 2014  | 2015  | 2016  |
|-------------------------|-------|-------|-------|-------|-------|
| The same day they leave | 1.4%  | 2.0%  | 0.6%  | 0.0%  | 0.3%  |
| Between 2 and 7 days    | 19.5% | 9.2%  | 14.6% | 10.0% | 7.6%  |
| Between 8 and 15 days   | 19.4% | 20.6% | 10.4% | 13.7% | 10.3% |
| Between 16 and 30 days  | 17.1% | 27.8% | 19.6% | 22.5% | 15.3% |
| Between 31 and 90 days  | 27.3% | 26.9% | 37.8% | 34.9% | 36.7% |
| More than 90 days       | 15.3% | 13.6% | 16.9% | 18.8% | 29.8% |

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



|  | 2012  | 2013  | 2014  | 2015  | 2016  |
|--|-------|-------|-------|-------|-------|
| Flight only  | 7.0%  | 12.1% | 14.4% | 13.6% | 6.6%  |
| Flight and accommodation (room only)               | 5.9%  | 23.7% | 9.5%  | 13.5% | 12.7% |
| Flight and accommodation (B&B)                     | 3.9%  | 3.5%  | 2.5%  | 3.3%  | 5.8%  |
| Flight and accommodation (half board)              | 24.2% | 21.6% | 18.7% | 19.5% | 14.8% |
| Flight and accommodation (full board)              | 4.1%  | 3.8%  | 6.3%  | 5.9%  | 13.0% |
| Flight and accommodation (all inclusive)           | 54.9% | 35.2% | 48.6% | 44.2% | 47.0% |
| <b>% Tourists using low-cost airlines</b>          | 47.3% | 57.4% | 47.4% | 49.9% | 55.7% |
| <b>Other expenses in their place of residence:</b> |       |       |       |       |       |
| - Car rental                                       | 10.2% | 13.6% | 11.5% | 12.6% | 13.1% |
| - Sporting activities                              | 3.5%  | 1.3%  | 1.8%  | 0.8%  | 2.5%  |
| - Excursions                                       | 1.9%  | 2.5%  | 3.1%  | 2.7%  | 0.6%  |
| - Trip to other islands                            | 0.6%  | 3.8%  | 3.2%  | 1.7%  | 1.3%  |

(\*) 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)

## Canary Islands: Portuguese market

### Which island do they choose?

| Tourists (> 16 years old) | 2012   | 2013   | 2014   | 2015   | 2016   |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote               | 7,690  | 3,163  | 5,303  | 3,407  | 3,791  |
| - Fuerteventura           | 5,077  | 6,459  | 3,198  | 4,518  | 6,462  |
| - Gran Canaria            | 17,427 | 17,187 | 17,461 | 14,919 | 34,084 |
| - Tenerife                | 21,559 | 30,808 | 14,185 | 15,940 | 18,807 |
| - La Palma                | 0      | 0      | 0      | 0      | 48     |

| Share (%)       | 2012  | 2013  | 2014  | 2015  | 2016  |
|-----------------|-------|-------|-------|-------|-------|
| - Lanzarote     | 14.9% | 5.5%  | 13.2% | 8.8%  | 6.0%  |
| - Fuerteventura | 9.8%  | 11.2% | 8.0%  | 11.6% | 10.2% |
| - Gran Canaria  | 33.7% | 29.8% | 43.5% | 38.5% | 53.9% |
| - Tenerife      | 41.7% | 53.5% | 35.3% | 41.1% | 29.8% |
| - La Palma      | 0.0%  | 0.0%  | 0.0%  | 0.0%  | 0.1%  |

### Who do they come with?

|  | 2012  | 2013  | 2014  | 2015  | 2016  |
|--|-------|-------|-------|-------|-------|
| Unaccompanied                            | 5.6%  | 14.5% | 11.3% | 11.6% | 8.3%  |
| Only with partner                        | 40.4% | 35.6% | 44.4% | 36.3% | 40.9% |
| Only with children (under the age of 13) | 0.6%  | 0.0%  | 1.3%  | 4.2%  | 0.9%  |
| Partner + children (under the age of 13) | 10.8% | 20.3% | 16.5% | 20.4% | 17.3% |
| Other relatives                          | 5.8%  | 6.9%  | 3.1%  | 6.8%  | 6.3%  |
| Friends                                  | 8.3%  | 3.9%  | 5.0%  | 3.0%  | 4.3%  |
| Work colleagues                          | 0.8%  | 0.0%  | 0.9%  | 0.8%  | 1.0%  |
| Other combinations <sup>(1)</sup>        | 27.8% | 18.9% | 17.6% | 17.1% | 21.0% |

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

### How do they rate the destination?

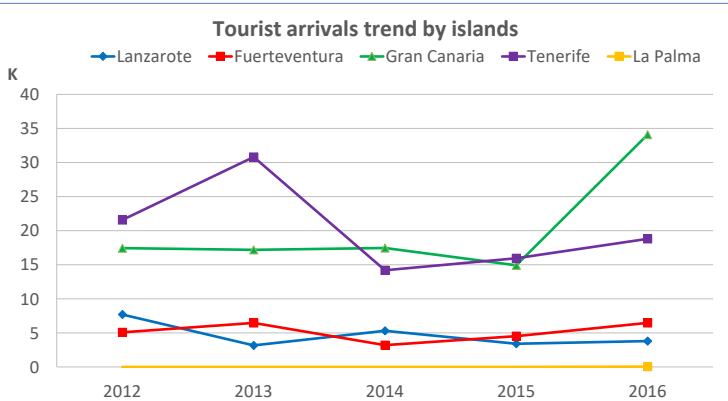
| Impression of their stay       | 2012  | 2013  | 2014  | 2015  | 2016  |
|--------------------------------|-------|-------|-------|-------|-------|
| Good or very good (% tourists) | 90.5% | 90.2% | 92.9% | 90.7% | 90.1% |
| Average rating (scale 1-10)    | 8.48  | 8.31  | 8.47  | 8.45  | 8.41  |

### How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012  | 2013  | 2014  | 2015  | 2016  |
|---------------------------------------|-------|-------|-------|-------|-------|
| Repeat tourists                       | 55.3% | 56.0% | 60.5% | 55.9% | 57.3% |
| In love (at least 10 previous visits) | 4.4%  | 3.7%  | 4.4%  | 7.9%  | 6.6%  |

### Where does the flight come from?

| Ten main origin countries | 2012   | 2013   | 2014   | 2015   | 2016   |
|---------------------------|--------|--------|--------|--------|--------|
| Portugal                  | 43,008 | 36,795 | 31,143 | 28,076 | 45,387 |
| Spanish Mainland          | 7,815  | 20,815 | 8,435  | 9,841  | 17,090 |
| Italy                     | 0      | 0      | 0      | 0      | 143    |
| Germany                   | 0      | 0      | 0      | 251    | 0      |
| France                    | 0      | 0      | 0      | 123    | 0      |
| United Kingdom            | 783    | 7      | 0      | 100    | 0      |
| Austria                   | 0      | 0      | 0      | 0      | 0      |
| Belgium                   | 0      | 0      | 0      | 0      | 0      |
| Denmark                   | 0      | 0      | 0      | 0      | 0      |
| Others                    | 147    | 0      | 569    | 394    | 1,017  |



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                       | 76.5% | 75.5% | 78.7% | 75.8% | 73.3% |
| Beaches                           | 48.0% | 48.5% | 45.0% | 52.2% | 55.7% |
| Tranquillity/rest/relaxation      | 24.9% | 23.6% | 31.0% | 31.6% | 28.0% |
| Visiting new places               | 30.5% | 22.7% | 22.7% | 23.1% | 25.5% |
| Price                             | 28.1% | 23.3% | 26.1% | 15.4% | 18.8% |
| Scenery                           | 16.7% | 9.4%  | 16.3% | 19.1% | 15.5% |
| Security                          | 4.7%  | 4.4%  | 4.3%  | 10.4% | 12.8% |
| Ease of travel                    | 7.0%  | 10.8% | 6.3%  | 8.6%  | 5.9%  |
| Suitable destination for children | 4.1%  | 5.8%  | 3.0%  | 5.3%  | 5.8%  |
| Shopping                          | 3.6%  | 2.5%  | 2.7%  | 4.6%  | 5.1%  |
| Nightlife/fun                     | 3.7%  | 1.8%  | 1.1%  | 2.4%  | 3.3%  |
| Active tourism                    | 1.1%  | 4.3%  | 3.5%  | 2.4%  | 2.5%  |
| Nautical activities               | 0.9%  | 5.8%  | 5.1%  | 1.1%  | 1.4%  |
| Theme parks                       | 0.9%  | 1.9%  | 2.3%  | 3.0%  | 1.0%  |
| Golf                              | 0.6%  | 0.5%  | 1.6%  | 0.0%  | 0.9%  |
| Quality of the environment        | 2.4%  | 6.0%  | 1.7%  | 0.4%  | 0.6%  |

\* Multi-choice question

### What did motivate them to come?

| Aspects motivating the choice            | 2012  | 2013  | 2014  | 2015  | 2016  |
|--|-------|-------|-------|-------|-------|
| Previous visits to the Canary Islands    | 40.3% | 39.9% | 39.2% | 45.8% | 37.8% |
| Recommendation by friends or relatives   | 26.1% | 36.7% | 37.9% | 37.6% | 37.2% |
| The Canary Islands television channel    | 0.5%  | 0.9%  | 0.0%  | 0.0%  | 0.0%  |
| Other television or radio channels       | 1.2%  | 1.8%  | 0.6%  | 0.0%  | 0.4%  |
| Information in the press/magazines/books | 3.6%  | 4.5%  | 8.6%  | 8.1%  | 6.0%  |
| Attendance at a tourism fair             | 1.4%  | 0.4%  | 2.5%  | 2.9%  | 2.7%  |
| Tour Operator's brochure or catalogue    | 13.6% | 7.8%  | 10.9% | 11.6% | 9.9%  |
| Recommendation by Travel Agency          | 32.5% | 20.2% | 20.9% | 25.2% | 30.9% |
| Information obtained via the Internet    | 26.2% | 31.1% | 25.7% | 28.4% | 22.7% |
| Senior Tourism programme                 | 0.0%  | 0.5%  | 0.0%  | 0.0%  | 2.0%  |
| Others                                   | 7.0%  | 8.5%  | 6.1%  | 7.0%  | 7.3%  |

\* Multi-choice question

