

Tourist profile trend (2016)

Canary Islands: Russian 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)	95,061	140,651	152,582	120,258	109,493
Average daily expenditure (€)	161.40	151.77	155.78	143.23	140.37
- in their place of residence	99.89	93.06	93.22	85.47	89.30
- in the Canary Islands	61.51	58.72	62.56	57.76	51.08
Average length of stay	12.62	12.17	12.75	13.39	12.66
Turnover per tourist (€)	1,857	1,660	1,658	1,638	1,499
Total turnover (> 16 years old) (€m)	177	233	253	197	164
Russian turnover: year on year change	--	32.3%	8.4%	-22.1%	-16.7%
Russian tourist arrivals: year on year change	--	48.0%	8.5%	-21.2%	-9.0%

	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	52.6%	32.1%	37.2%	24.9%	32.8%
- Tour Operator's website	24.4%	30.5%	16.7%	31.1%	36.7%
Accommodation	16.4%	20.1%	22.1%	29.1%	22.9%
- Accommodation's website	69.7%	82.3%	69.3%	74.6%	79.7%
Travel agency (High street)	14.2%	13.3%	11.1%	9.2%	11.0%
Online Travel Agency (OTA)	12.4%	32.2%	23.4%	29.9%	27.5%
No need to book accommodation	4.4%	2.4%	6.2%	6.9%	5.7%

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

	2012	2013	2014	2015	2016
Accommodation (**):	94.68	119.27	93.63	121.56	69.94
- Accommodation	90.33	113.46	88.25	112.75	65.71
- Additional accommodation expenses	4.35	5.81	5.38	8.80	4.22
Transport:	49.68	52.36	47.03	41.59	31.45
- Public transport	10.19	10.00	8.12	12.38	8.05
- Taxi	12.24	11.58	8.73	8.88	4.48
- Car rental	27.25	30.78	30.19	20.32	18.92
Food and drink:	204.08	201.62	234.79	276.11	240.13
- Food purchases at supermarkets	74.07	88.31	105.99	140.74	117.38
- Restaurants	130.02	113.31	128.80	135.37	122.74
Souvenirs:	188.19	146.47	189.95	144.98	178.05
Leisure:	110.92	105.14	93.91	64.44	44.93
- Organized excursions	66.17	65.89	53.85	35.39	28.96
- Leisure, amusement	17.75	17.11	14.55	8.75	9.46
- Trip to other islands	5.00	9.90	6.11	3.22	1.07
- Sporting activities	6.55	3.05	7.72	5.74	1.73
- Cultural activities	8.99	5.23	3.24	2.85	1.37
- Discos and disco-pubs	6.45	3.95	8.43	8.50	2.34
Others:	81.94	34.28	121.85	28.24	21.30
- Wellness	6.82	6.33	3.60	5.85	0.55
- Medical expenses	2.30	1.05	1.80	0.33	0.12
- Other expenses	72.82	26.91	116.45	22.05	20.63

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	52.8%	29.4%	33.6%	21.6%	29.5%
- Tour Operator's website	14.6%	21.6%	20.6%	35.8%	24.1%
Airline	22.4%	39.4%	42.6%	56.9%	45.1%
- Airline's website	79.6%	86.3%	91.8%	87.9%	91.3%
Travel agency (High street)	13.1%	11.0%	8.9%	8.0%	8.5%
Online Travel Agency (OTA)	11.7%	20.2%	14.9%	13.6%	16.9%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	15.6%	12.3%	13.4%	13.2%	11.3%
4* Hotel	38.9%	33.9%	35.7%	24.3%	34.0%
1-2-3* Hotel	12.1%	16.1%	16.3%	15.3%	16.7%
Apartment	29.6%	35.5%	26.0%	35.5%	32.0%
Property (privately-owned, friends, family)	2.8%	1.6%	6.8%	8.1%	3.8%
Others	1.1%	0.6%	1.7%	3.7%	2.2%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	46.1%	38.5%	44.1%	46.8%	44.4%
Percentage of women	53.9%	61.5%	55.9%	53.2%	55.6%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	37.9	36.7	36.7	38.6	38.0
Standard deviation	12.0	9.9	10.8	11.1	11.9

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	12.8%	10.2%	10.2%	10.6%	11.5%
25-30 years old	21.9%	19.8%	24.9%	18.3%	20.1%
31-45 years old	39.2%	50.9%	44.9%	45.9%	42.6%
46-60 years old	22.6%	17.5%	18.0%	22.3%	22.2%
Over 60 years old	3.5%	1.7%	2.0%	2.8%	3.6%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	29.8%	26.0%	34.6%	32.3%	32.0%
Upper/Middle management employee	37.9%	40.3%	30.5%	32.0%	35.9%
Auxiliary level employee	19.5%	25.4%	23.0%	23.1%	18.6%
Students	3.8%	3.5%	5.9%	5.9%	5.1%
Retired	4.5%	1.5%	2.5%	2.4%	3.8%
Unemployed / unpaid dom. work	4.4%	3.2%	3.5%	4.4%	4.5%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	34.1%	31.3%	33.2%	44.2%	44.3%
€24,001 - €36,000	22.2%	25.1%	19.5%	22.6%	23.4%
€36,001 - €48,000	16.0%	12.8%	13.8%	10.6%	8.5%
€48,001 - €60,000	9.4%	6.9%	13.4%	8.7%	12.1%
€60,001 - €72,000	6.5%	5.7%	7.4%	4.0%	4.1%
€72,001 - €84,000	1.8%	5.0%	2.2%	2.1%	0.8%
More than €84,000	9.9%	13.2%	10.5%	7.8%	6.7%

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.5%	1.1%	0.6%	0.9%	2.4%
Between 2 and 7 days	7.5%	9.2%	8.4%	5.8%	8.1%
Between 8 and 15 days	11.6%	12.8%	10.9%	10.3%	10.8%
Between 16 and 30 days	20.0%	16.8%	20.1%	13.5%	17.4%
Between 31 and 90 days	42.3%	32.5%	36.8%	34.5%	36.4%
More than 90 days	18.1%	27.5%	23.2%	35.0%	24.9%

What do they book at their place of residence?



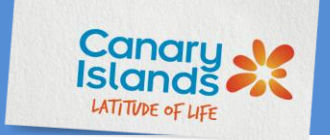
	2012	2013	2014	2015	2016
Flight only	11.7%	17.1%	15.7%	19.6%	13.2%
Flight and accommodation (room only)	26.6%	31.0%	30.6%	40.2%	34.1%
Flight and accommodation (B&B)	13.9%	13.6%	11.9%	6.9%	12.6%
Flight and accommodation (half board)	20.8%	20.2%	19.5%	15.5%	24.0%
Flight and accommodation (full board)	9.7%	7.0%	8.1%	6.8%	4.1%
Flight and accommodation (all inclusive)	17.3%	11.1%	14.1%	11.0%	12.0%
% Tourists using low-cost airlines	32.9%	43.0%	26.1%	19.5%	30.7%
Other expenses in their place of residence:					
- Car rental	13.7%	21.5%	19.9%	21.8%	28.4%
- Sporting activities	1.5%	5.2%	3.9%	5.2%	5.4%
- Excursions	15.3%	15.3%	17.3%	23.7%	20.4%
- Trip to other islands	4.3%	5.6%	4.8%	5.6%	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.

Tourist profile trend (2016)

Canary Islands: Russian market



Which island do they choose?



Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	188	643	1,704	235	345
- Fuerteventura	1,719	4,405	758	1,670	1,647
- Gran Canaria	6,465	8,564	11,167	9,997	7,367
- Tenerife	86,610	126,568	137,678	108,192	99,798
- La Palma	79	472	1,276	0	0

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	0.2%	0.5%	1.1%	0.2%	0.3%
- Fuerteventura	1.8%	3.1%	0.5%	1.4%	1.5%
- Gran Canaria	6.8%	6.1%	7.3%	8.3%	6.7%
- Tenerife	91.1%	90.0%	90.2%	90.1%	91.4%
- La Palma	0.1%	0.3%	0.8%	0.0%	0.0%

Who do they come with?



	2012	2013	2014	2015	2016
Unaccompanied	9.3%	9.1%	12.1%	18.2%	17.2%
Only with partner	32.5%	28.7%	26.9%	27.2%	27.8%
Only with children (under the age of 13)	4.4%	5.4%	4.1%	4.2%	3.0%
Partner + children (under the age of 13)	9.5%	11.8%	9.1%	8.5%	9.1%
Other relatives	7.6%	8.7%	10.2%	5.3%	5.8%
Friends	10.4%	6.1%	9.4%	5.4%	5.4%
Work colleagues	1.8%	0.0%	1.5%	0.1%	1.4%
Other combinations ⁽¹⁾	24.5%	30.2%	26.7%	31.1%	30.1%

* 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)	94.2%	95.6%	96.5%	96.9%	98.1%
Average rating (scale 1-10)	9.11	9.03	9.16	9.23	9.37

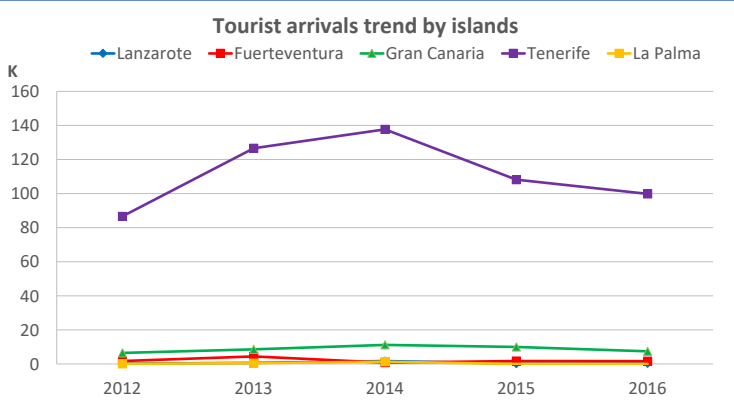
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	31.5%	26.7%	40.8%	51.0%	44.3%
In love (at least 10 previous visits)	2.4%	0.7%	4.4%	5.9%	4.7%

Where does the flight come from?



Ten main origin countries	2012	2013	2014	2015	2016
Russia	59,736	66,898	109,855	95,180	79,786
Spanish Mainland	21,600	60,828	26,010	12,968	24,971
Germany	3,036	8,427	2,900	3,920	633
Czech Republic	0	0	0	0	552
United Kingdom	570	329	2,360	1,569	428
Poland	938	0	4,279	888	372
Finland	3,611	0	1,855	2,015	346
Norway	846	0	449	0	267
Austria	0	313	439	0	0
Belgium	1,028	509	209	0	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	92.5%	86.6%	87.4%	84.6%	89.1%
Beaches	25.8%	33.7%	28.5%	33.1%	34.5%
Scenery	18.2%	23.2%	20.8%	22.8%	21.8%
Tranquillity/rest/relaxation	26.1%	17.7%	25.3%	25.5%	20.8%
Visiting new places	24.3%	28.8%	20.3%	19.3%	18.9%
Quality of the environment	21.5%	15.4%	19.6%	20.5%	17.2%
Security	12.8%	12.1%	10.8%	10.4%	13.3%
Active tourism	5.9%	13.6%	9.8%	9.2%	13.2%
Theme parks	5.7%	9.5%	8.7%	6.7%	8.1%
Suitable destination for children	11.3%	10.1%	8.7%	10.8%	8.0%
Nautical activities	5.0%	3.7%	4.0%	5.4%	5.2%
Shopping	8.4%	8.6%	8.2%	5.1%	4.9%
Price	5.7%	8.6%	9.2%	4.3%	3.9%
Culture	5.9%	3.4%	3.8%	3.5%	2.9%
Security against natural catastrophes	0.9%	0.8%	0.5%	1.6%	2.3%
Ease of travel	2.0%	1.5%	2.6%	1.8%	2.2%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	26.0%	24.1%	35.8%	45.5%	42.3%
Recommendation by friends or relatives	48.5%	45.5%	48.4%	41.7%	45.7%
The Canary Islands television channel	0.6%	0.8%	0.7%	0.5%	0.2%
Other television or radio channels	2.8%	3.0%	2.1%	2.6%	2.1%
Information in the press/magazines/books	5.6%	9.4%	7.1%	4.0%	5.8%
Attendance at a tourism fair	3.0%	3.1%	0.9%	4.7%	1.1%
Tour Operator's brochure or catalogue	7.2%	11.3%	4.8%	5.6%	5.1%
Recommendation by Travel Agency	20.4%	9.7%	12.5%	6.5%	10.2%
Information obtained via the Internet	45.4%	56.1%	42.3%	39.6%	42.3%
Senior Tourism programme	0.0%	0.0%	0.8%	0.4%	0.0%
Others	4.0%	2.9%	4.0%	5.8%	3.0%

* Multi-choice question

