

Tourist profile trend (2016)

Canary Islands: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	2,692,655	2,975,943	2,884,556	3,133,921	3,535,847
Average daily expenditure (€)	131.71	133.47	134.42	139.88	143.77
. in their place of residence	93.33	94.90	96.00	99.88	104.98
. in the Canary Islands	38.38	38.58	38.42	40.00	38.79
Average length of stay	9.13	8.92	9.18	9.19	8.78
Turnover per tourist (€)	1,110	1,065	1,092	1,157	1,154
Total turnover (> 16 years old) (€m)	2,988	3,168	3,150	3,627	4,080
Share of total turnover	27.4%	28.2%	26.4%	27.9%	27.3%
Share of total tourist	26.8%	28.5%	26.4%	27.7%	27.0%

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

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation (**):	34.71	37.36	39.36	47.57	46.99
- Accommodation	30.18	33.30	33.26	40.76	41.05
- Additional accommodation expenses	4.53	4.06	6.09	6.81	5.95
Transport:	26.61	25.81	25.35	26.28	26.32
- Public transport	4.77	5.78	4.78	4.89	5.29
- Taxi	7.87	6.57	6.82	7.36	7.40
- Car rental	13.96	13.46	13.75	14.03	13.63
Food and drink:	154.12	140.33	156.55	159.71	145.35
- Food purchases at supermarkets	61.85	61.52	66.54	67.32	61.45
- Restaurants	92.27	78.81	90.02	92.40	83.90
Souvenirs:	56.19	57.24	58.86	54.05	51.99
Leisure:	35.38	34.96	33.75	32.17	31.41
- Organized excursions	13.89	16.01	13.81	13.15	13.68
- Leisure, amusement	4.82	4.56	4.73	4.45	4.26
- Trip to other islands	1.80	1.15	1.40	1.28	1.53
- Sporting activities	4.27	5.11	5.27	5.05	4.40
- Cultural activities	2.14	1.81	1.81	2.01	1.69
- Discos and disco-pubs	8.46	6.32	6.72	6.22	5.85
Others:	21.39	17.62	21.09	15.91	13.96
- Wellness	4.50	2.92	3.15	3.20	3.48
- Medical expenses	1.72	1.22	1.16	1.27	1.65
- Other expenses	15.18	13.48	16.78	11.44	8.82

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.5%	0.9%	0.5%	0.6%	0.5%
Between 2 and 7 days	8.0%	10.2%	8.8%	7.2%	6.2%
Between 8 and 15 days	10.0%	10.7%	9.4%	8.4%	6.6%
Between 16 and 30 days	16.9%	15.4%	15.5%	15.1%	14.6%
Between 31 and 90 days	34.3%	33.1%	33.5%	35.6%	35.7%
More than 90 days	30.3%	29.7%	32.4%	33.2%	36.5%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	10.1%	9.2%	10.5%	9.8%	8.6%
Flight and accommodation (room only)	27.0%	26.7%	25.3%	27.0%	27.4%
Flight and accommodation (B&B)	8.4%	8.8%	9.7%	8.8%	8.7%
Flight and accommodation (half board)	20.5%	19.2%	18.4%	18.4%	19.5%
Flight and accommodation (full board)	4.6%	4.4%	4.5%	4.4%	4.2%
Flight and accommodation (all inclusive)	29.5%	31.7%	31.7%	31.6%	31.6%
% Tourists using low-cost airlines	34.3%	42.7%	42.1%	45.3%	47.5%
Other expenses in their place of residence:					
- Car rental	9.7%	10.9%	11.1%	11.1%	11.7%
- Sporting activities	5.0%	5.8%	5.1%	5.0%	5.2%
- Excursions	4.3%	5.0%	5.1%	5.5%	5.3%
- Trip to other islands	1.5%	2.4%	2.3%	2.5%	1.5%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	46.6%	45.3%	46.7%	46.4%	43.2%
- Tour Operator's website	75.5%	81.7%	77.8%	80.2%	79.4%
Accommodation	13.2%	12.8%	14.0%	13.2%	15.3%
- Accommodation's website	81.5%	83.2%	80.5%	82.2%	83.5%
Travel agency (High street)	21.4%	20.6%	19.0%	18.2%	19.2%
Online Travel Agency (OTA)	12.7%	14.7%	13.6%	15.3%	16.4%
No need to book accommodation	6.1%	6.7%	6.7%	6.9%	5.9%

Flight booking

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tour Operator	49.3%	48.1%	48.4%	48.3%	46.5%
- Tour Operator's website	74.4%	79.5%	77.1%	79.6%	76.4%
Airline	21.3%	21.8%	23.3%	23.9%	25.0%
- Airline's website	94.5%	96.4%	96.4%	95.3%	96.2%
Travel agency (High street)	20.6%	19.3%	18.3%	17.3%	18.0%
Online Travel Agency (OTA)	8.8%	10.8%	10.0%	10.4%	10.6%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	7.6%	7.3%	7.3%	7.4%	6.4%
4* Hotel	37.1%	36.4%	37.8%	36.8%	38.7%
1-2-3* Hotel	16.1%	16.4%	15.7%	14.8%	13.9%
Apartment	31.2%	30.1%	29.7%	31.3%	33.6%
Property (privately-owned, friends, family)	4.9%	5.8%	5.9%	6.1%	4.4%
Others	3.0%	4.0%	3.6%	3.7%	2.9%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	49.7%	49.5%	50.0%	50.0%	49.4%
Percentage of women	50.3%	50.5%	50.0%	50.0%	50.6%
Age					
Average age (tourists > 16 years old)	46.1	44.0	46.0	47.0	47.3
Standard deviation	14.3	13.6	13.9	14.8	14.8
Age range (> 16 years old)					
16-24 years old	6.6%	6.9%	6.2%	6.6%	6.3%
25-30 years old	11.2%	12.9%	10.3%	11.0%	9.5%
31-45 years old	29.3%	35.1%	32.0%	28.1%	30.1%
46-60 years old	35.4%	32.3%	35.3%	34.0%	32.5%
Over 60 years old	17.6%	12.7%	16.2%	20.4%	21.6%
Occupation					
Business owner or self-employed	22.8%	24.0%	24.4%	23.3%	23.7%
Upper/Middle management employee	38.0%	40.3%	39.3%	36.6%	37.2%
Auxiliary level employee	17.6%	17.6%	15.4%	16.0%	14.7%
Students	3.4%	3.7%	3.7%	3.9%	4.0%
Retired	15.7%	11.4%	14.7%	17.8%	18.3%
Unemployed / unpaid dom. work	2.5%	2.9%	2.5%	2.4%	2.0%
Annual household income level					
€12,000 - €24,000	17.3%	16.4%	16.2%	16.7%	16.4%
€24,001 - €36,000	19.9%	18.7%	17.6%	18.7%	18.4%
€36,001 - €48,000	17.7%	17.1%	16.3%	16.8%	16.6%
€48,001 - €60,000	14.0%	14.4%	15.7%	14.5%	14.7%
€60,001 - €72,000	8.9%	10.5%	9.3%	9.6%	9.7%
€72,001 - €84,000	6.3%	6.6%	6.3%	6.1%	6.6%
More than €84,000	15.8%	16.5%	18.5%	17.7%	17.7%

(*) 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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Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4	Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	445,569	482,417	467,397	527,062	600,909	- Lanzarote	16.7%	16.3%	16.3%	17.0%	17.1%
- Fuerteventura	371,091	407,337	398,938	437,284	495,222	- Fuerteventura	13.9%	13.8%	14.0%	14.1%	14.1%
- Gran Canaria	788,308	901,778	863,399	951,656	1,064,140	- Gran Canaria	29.5%	30.6%	30.2%	30.6%	30.3%
- Tenerife	1,026,851	1,123,476	1,092,650	1,144,231	1,280,669	- Tenerife	38.5%	38.1%	38.2%	36.8%	36.5%
- La Palma	37,879	35,785	37,346	45,080	65,961	- La Palma	1.4%	1.2%	1.3%	1.5%	1.9%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	9.4%	12.1%	10.6%	10.6%	9.1%
Only with partner	53.1%	47.7%	47.2%	51.3%	44.4%
Only with children (under the age of 13)	1.0%	1.3%	1.3%	1.1%	1.6%
Partner + children (under the age of 13)	8.3%	9.5%	12.4%	9.1%	12.5%
Other relatives	6.3%	5.9%	6.0%	6.4%	7.3%
Friends	6.0%	5.7%	5.4%	5.4%	5.3%
Work colleagues	0.6%	0.3%	0.5%	0.4%	0.4%
Other combinations ⁽¹⁾	15.3%	17.5%	16.6%	15.5%	19.5%

* 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)	93.5%	93.6%	94.4%	94.0%	92.8%
Average rating (scale 1-10)	8.77	8.79	8.86	8.90	8.81

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	79.0%	77.1%	79.2%	79.4%	79.3%
In love (at least 10 previous visits)	18.6%	16.8%	17.4%	18.9%	17.8%

Where are they from?



Ten main source markets	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
United Kingdom	762,130	800,912	819,317	943,624	1,087,933
Germany	595,046	679,237	648,721	674,020	768,719
Spanish Mainland	260,645	275,386	259,204	267,982	310,568
Sweden	180,847	216,066	193,921	200,240	214,101
Norway	167,010	181,097	151,943	148,990	150,047
Netherlands	100,626	107,740	104,058	116,537	133,898
Italy	43,899	57,901	69,604	82,952	106,992
Ireland	77,664	74,169	71,828	89,269	97,821
France	55,363	70,909	78,961	96,457	95,343
Belgium	68,072	72,034	74,073	85,016	93,957

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	92.3%	91.7%	91.2%	91.7%	91.7%
Tranquillity/rest/relaxation	41.9%	40.3%	39.8%	38.9%	37.4%
Beaches	34.1%	34.5%	33.3%	34.4%	34.3%
Scenery	19.6%	19.9%	20.7%	22.5%	20.8%
Visiting new places	13.2%	14.0%	12.4%	12.1%	13.5%
Price	14.0%	12.9%	13.6%	12.4%	11.4%
Security	5.3%	5.9%	5.8%	9.5%	10.7%
Ease of travel	9.6%	9.2%	9.3%	8.8%	9.3%
Suitable destination for children	5.9%	7.6%	8.1%	6.1%	7.9%
Quality of the environment	6.1%	5.5%	6.0%	6.2%	6.0%
Active tourism	4.4%	4.8%	5.3%	5.4%	5.0%
Nightlife/fun	4.8%	4.4%	3.9%	3.7%	3.5%
Shopping	3.2%	2.6%	3.0%	2.9%	3.0%
Theme parks	1.9%	2.2%	2.3%	2.3%	2.4%
Culture	1.9%	2.3%	2.4%	2.4%	2.4%
Nautical activities	2.1%	2.4%	2.0%	2.0%	2.2%

* Multi-choice question

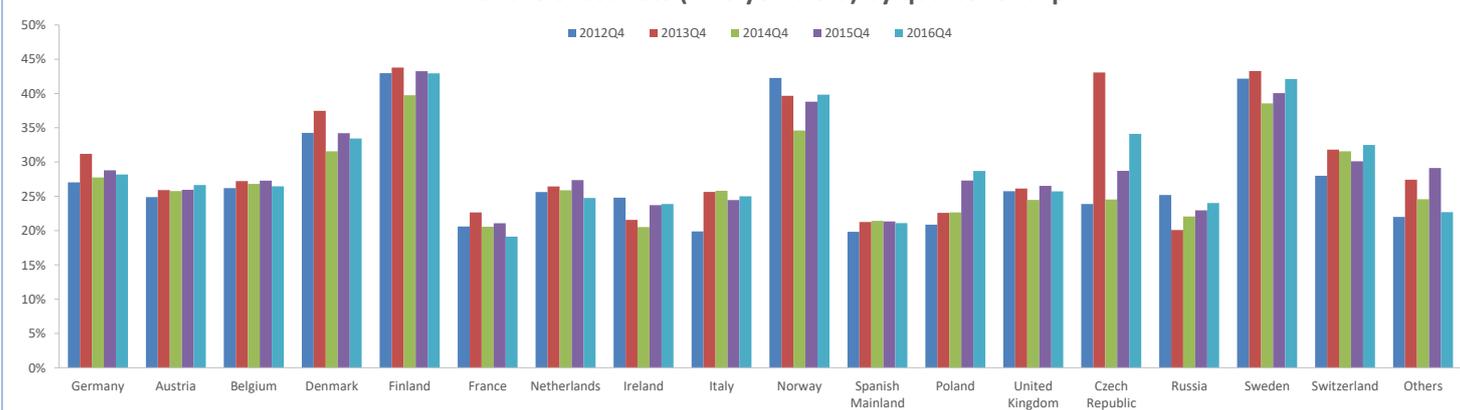
What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	67.7%	64.8%	67.3%	68.2%	66.9%
Recommendation by friends or relatives	33.1%	32.7%	32.8%	32.8%	33.3%
The Canary Islands television channel	0.3%	0.3%	0.3%	0.3%	0.3%
Other television or radio channels	0.6%	0.7%	0.8%	0.7%	0.6%
Information in the press/magazines/books	4.1%	4.0%	3.7%	3.5%	3.8%
Attendance at a tourism fair	0.7%	0.4%	0.5%	0.4%	0.4%
Tour Operator's brochure or catalogue	9.6%	8.3%	7.4%	7.3%	7.2%
Recommendation by Travel Agency	9.9%	9.1%	9.0%	8.5%	9.2%
Information obtained via the Internet	24.8%	26.6%	24.6%	24.2%	25.1%
Senior Tourism programme	0.2%	0.2%	0.2%	0.2%	0.2%
Others	7.7%	7.7%	7.3%	6.9%	6.0%

* 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.