

# Tourist profile according to tourist loyalty to the destination (2016)

## Tourists visiting the Canary Islands for the first time



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



|   | First visit | Total      |
|---|-------------|------------|
| Tourist arrivals (> 16 years old)                                     | 2,915,292   | 13,114,359 |
| Average daily expenditure (€)   | 140.30      | 135.94     |
| . in their place of residence   | 101.73      | 98.03      |
| . in the Canary Islands   | 38.57       | 37.90      |
| Average length of stay  | 8.0         | 9.4        |
| Turnover per tourist (€)  | 1,046       | 1,141      |
| Total turnover (> 16 years old) (€m)                                  | 3,049       | 14,957     |
| Share of total turnover   | 20.4%       | 100%       |
| Share of total tourist  | 22.7%       | 100%       |
| <b>Expenditure in the Canary Islands per tourist and trip (€) (*)</b> |             |            |
| <b>Accommodation (**):</b>  | 42.70       | 47.11      |
| - Accommodation   | 37.28       | 40.52      |
| - Additional accommodation expenses                                   | 5.42        | 6.60       |
| <b>Transport:</b>   | 26.76       | 26.01      |
| - Public transport  | 5.66        | 5.14       |
| - Taxi  | 5.46        | 6.94       |
| - Car rental  | 15.65       | 13.93      |
| <b>Food and drink:</b>  | 112.60      | 148.33     |
| - Food purchases at supermarkets                                      | 46.61       | 63.46      |
| - Restaurants   | 66.00       | 84.87      |
| <b>Souvenirs:</b>   | 50.89       | 53.88      |
| <b>Leisure:</b>   | 43.52       | 34.52      |
| - Organized excursions  | 22.13       | 14.95      |
| - Leisure, amusement  | 6.07        | 4.55       |
| - Trip to other islands   | 2.09        | 1.85       |
| - Sporting activities   | 5.59        | 5.11       |
| - Cultural activities   | 2.62        | 2.04       |
| - Discos and disco-pubs   | 5.03        | 6.01       |
| <b>Others:</b>  | 12.06       | 13.91      |
| - Wellness  | 2.79        | 3.23       |
| - Medical expenses  | 0.88        | 1.69       |
| - Other expenses  | 8.40        | 8.99       |

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



|                         | First visit | Total |
|-------------------------|-------------|-------|
| The same day they leave | 0.6%        | 0.6%  |
| Between 2 and 7 days    | 7.8%        | 6.3%  |
| Between 8 and 15 days   | 9.3%        | 7.9%  |
| Between 16 and 30 days  | 17.0%       | 14.7% |
| Between 31 and 90 days  | 34.4%       | 34.3% |
| More than 90 days       | 30.9%       | 36.2% |

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



|  | First visit | Total |
|--|-------------|-------|
| Flight only  | 6.5%        | 8.8%  |
| Flight and accommodation (room only)               | 21.6%       | 25.7% |
| Flight and accommodation (B&B)                     | 9.3%        | 8.0%  |
| Flight and accommodation (half board)              | 20.6%       | 20.4% |
| Flight and accommodation (full board)              | 5.5%        | 4.3%  |
| Flight and accommodation (all inclusive)           | 36.5%       | 32.8% |
| % Tourists using low-cost airlines                 | 54.0%       | 48.7% |
| <b>Other expenses in their place of residence:</b> |             |       |
| - Car rental                                       | 14.8%       | 11.8% |
| - Sporting activities                              | 7.3%        | 5.3%  |
| - Excursions                                       | 8.7%        | 5.7%  |
| - Trip to other islands                            | 2.1%        | 1.6%  |

### How do they book?



| Accommodation booking                | First visit | Total |
|--------------------------------------|-------------|-------|
| <b>Tour Operator</b>                 | 37.7%       | 42.3% |
| - Tour Operator's website            | 75.9%       | 78.8% |
| <b>Accommodation</b>                 | 12.6%       | 14.7% |
| - Accommodation's website            | 88.4%       | 83.5% |
| <b>Travel agency (High street)</b>   | 25.0%       | 20.5% |
| <b>Online Travel Agency (OTA)</b>    | 21.3%       | 16.5% |
| <b>No need to book accommodation</b> | 3.5%        | 6.0%  |

### Flight booking

|                                    | First visit | Total |
|------------------------------------|-------------|-------|
| <b>Tour Operator</b>               | 39.3%       | 44.6% |
| - Tour Operator's website          | 72.4%       | 76.3% |
| <b>Airline</b>                     | 23.3%       | 24.8% |
| - Airline's website                | 95.4%       | 96.2% |
| <b>Travel agency (High street)</b> | 23.1%       | 19.1% |
| <b>Online Travel Agency (OTA)</b>  | 14.2%       | 11.5% |

### Where do they stay?



|  | First visit | Total |
|--|-------------|-------|
| <b>5* Hotel</b>                                    | 6.7%        | 7.1%  |
| <b>4* Hotel</b>                                    | 40.7%       | 39.6% |
| <b>1-2-3* Hotel</b>                                | 17.9%       | 14.6% |
| <b>Apartment</b>                                   | 29.2%       | 31.5% |
| <b>Property (privately-owned, friends, family)</b> | 2.4%        | 4.6%  |
| <b>Others</b>                                      | 3.1%        | 2.6%  |

### Who are they?



| Gender                                | First visit | Total |
|---------------------------------------|-------------|-------|
| Percentage of men                     | 49.1%       | 48.5% |
| Percentage of women                   | 50.9%       | 51.5% |
| <b>Age</b>                            |             |       |
| Average age (tourists > 16 years old) | 38.7        | 46.3  |
| Standard deviation                    | 14.0        | 15.3  |
| <b>Age range (&gt; 16 years old)</b>  |             |       |
| 16-24 years old                       | 15.5%       | 8.2%  |
| 25-30 years old                       | 20.3%       | 11.1% |
| 31-45 years old                       | 33.9%       | 29.1% |
| 46-60 years old                       | 21.7%       | 30.9% |
| Over 60 years old                     | 8.6%        | 20.7% |
| <b>Occupation</b>                     |             |       |
| Business owner or self-employed       | 21.1%       | 23.1% |
| Upper/Middle management employee      | 40.6%       | 36.1% |
| Auxiliary level employee              | 18.8%       | 15.5% |
| Students                              | 9.3%        | 5.1%  |
| Retired                               | 7.5%        | 18.0% |
| Unemployed / unpaid dom. work         | 2.6%        | 2.2%  |
| <b>Annual household income level</b>  |             |       |
| €12,000 - €24,000                     | 24.9%       | 17.8% |
| €24,001 - €36,000                     | 20.6%       | 19.4% |
| €36,001 - €48,000                     | 15.0%       | 16.9% |
| €48,001 - €60,000                     | 13.3%       | 14.6% |
| €60,001 - €72,000                     | 8.0%        | 9.5%  |
| €72,001 - €84,000                     | 4.6%        | 6.0%  |
| More than €84,000                     | 13.6%       | 15.8% |

(\*) 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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## Tourists visiting the Canary Islands for the first time



### Which island do they choose?



| Tourists (> 16 years old)       | Canary Islands | Lanzarote | Fuerteventura | Gran Canaria | Tenerife  | La Palma |
|---------------------------------|----------------|-----------|---------------|--------------|-----------|----------|
| Tourists in their first visit   | 2,915,292      | 404,818   | 434,600       | 756,166      | 1,250,966 | 47,705   |
| - Share by islands              | 100%           | 13.9%     | 14.9%         | 25.9%        | 42.9%     | 1.6%     |
| Total tourists                  | 13,114,359     | 2,328,674 | 1,914,107     | 3,654,806    | 4,885,901 | 221,541  |
| - Share by islands              | 100%           | 17.8%     | 14.6%         | 27.9%        | 37.3%     | 1.7%     |
| % Tourists in their first visit | 22.7%          | 17.6%     | 23.0%         | 21.1%        | 26.5%     | 21.9%    |

### Who do they come with?



|  | First visit | Total |
|--|-------------|-------|
| Unaccompanied                            | 8.0%        | 9.1%  |
| Only with partner                        | 46.2%       | 47.6% |
| Only with children (under the age of 13) | 1.6%        | 1.5%  |
| Partner + children (under the age of 13) | 12.5%       | 11.8% |
| Other relatives                          | 6.7%        | 6.0%  |
| Friends                                  | 8.7%        | 6.1%  |
| Work colleagues                          | 0.3%        | 0.3%  |
| Other combinations <sup>(1)</sup>        | 16.0%       | 17.5% |

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

### How do they rate the destination?



| Impression of their stay       | First visit | Total |
|--------------------------------|-------------|-------|
| Good or very good (% tourists) | 93.1%       | 94.1% |
| Average rating (scale 1-10)    | 8.79        | 8.90  |

### How many are loyal to the destination?

| Repeat tourists of the Canary Islands | First visit | Total |
|---------------------------------------|-------------|-------|
| Repeat tourists                       | 0.0%        | 77.3% |
| In love (at least 10 previous visits) | 0.0%        | 16.1% |

### Where are they from?



| Ten main source markets | Share | Absolute |
|-------------------------|-------|----------|
| United Kingdom          | 23.3% | 678,619  |
| Germany                 | 20.6% | 599,247  |
| Spanish Mainland        | 10.1% | 293,759  |
| France                  | 8.3%  | 241,640  |
| Italy                   | 6.6%  | 191,697  |
| Netherlands             | 5.3%  | 155,772  |
| Belgium                 | 2.9%  | 85,280   |
| Sweden                  | 2.7%  | 79,524   |
| Switzerland             | 2.4%  | 69,416   |
| Poland                  | 2.1%  | 60,891   |

### Why do they choose the Canary Islands?



| Aspects influencing the choice    | First visit | Total |
|-----------------------------------|-------------|-------|
| Climate/sun                       | 86.1%       | 89.8% |
| Beaches                           | 36.3%       | 34.5% |
| Tranquillity/rest/relaxation      | 31.4%       | 36.6% |
| Visiting new places               | 27.9%       | 14.6% |
| Scenery                           | 26.0%       | 21.9% |
| Price                             | 13.2%       | 12.7% |
| Security                          | 9.1%        | 11.1% |
| Active tourism                    | 7.0%        | 5.1%  |
| Suitable destination for children | 6.3%        | 7.5%  |
| Ease of travel                    | 5.2%        | 8.9%  |
| Quality of the environment        | 4.5%        | 6.5%  |
| Theme parks                       | 4.4%        | 3.0%  |
| Nightlife/fun                     | 3.4%        | 3.8%  |
| Nautical activities               | 3.0%        | 2.2%  |
| Culture                           | 3.0%        | 2.6%  |
| Shopping                          | 1.3%        | 2.6%  |

\* Multi-choice question

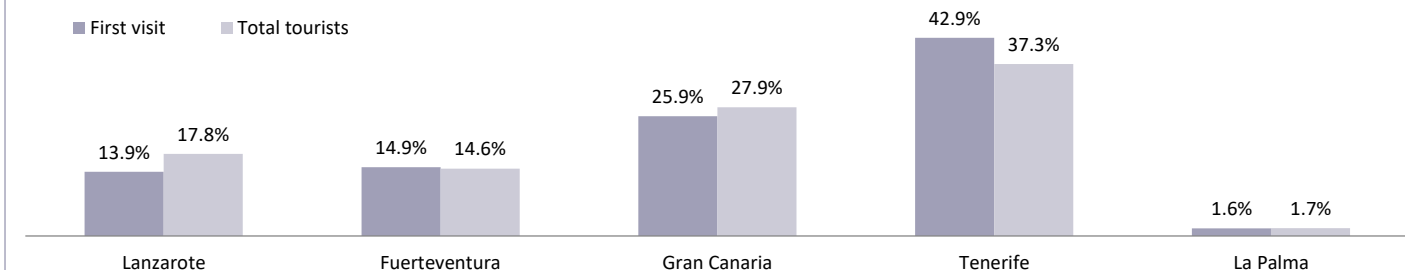
### What did motivate them to come?



| Aspects motivating the choice            | First visit | Total |
|--|-------------|-------|
| Previous visits to the Canary Islands    | 0.0%        | 64.1% |
| Recommendation by friends or relatives   | 59.2%       | 34.5% |
| The Canary Islands television channel    | 0.6%        | 0.3%  |
| Other television or radio channels       | 2.1%        | 0.8%  |
| Information in the press/magazines/books | 8.1%        | 3.8%  |
| Attendance at a tourism fair             | 0.9%        | 0.5%  |
| Tour Operator's brochure or catalogue    | 11.6%       | 8.0%  |
| Recommendation by Travel Agency          | 18.5%       | 9.7%  |
| Information obtained via the Internet    | 43.4%       | 25.8% |
| Senior Tourism programme                 | 0.2%        | 0.2%  |
| Others                                   | 7.0%        | 6.1%  |

\* Multi-choice question

### Distribution of tourist arrivals by island (2016)



Source: Encuesta sobre el Gasto Turístico (ISTAC). Profile of tourist visiting the Canary Islands for the first time. (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.