

Tourist profile trend (2016)

Canary Islands: Czech 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)	38,213	--	37,825	39,297	58,913
Average daily expenditure (€)	117.03	--	102.18	110.22	123.72
. in their place of residence	87.30	--	75.99	86.07	93.82
. in the Canary Islands	29.73	--	26.20	24.15	29.90
Average length of stay	9.44	--	11.11	10.13	8.94
Turnover per tourist (€)	979	--	985	976	1,038
Total turnover (> 16 years old) (€m)	37	--	37	38	61
Czech turnover: year on year change	--	--	--	3.0%	59.4%
Czech tourist arrivals: year on year change	--	--	--	3.9%	49.9%

	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	38.9%	--	21.2%	28.5%	27.2%
- Tour Operator's website	54.6%	--	45.8%	57.8%	47.8%
Accommodation	7.4%	--	14.3%	14.3%	14.7%
- Accommodation's website	66.9%	--	63.4%	89.0%	88.5%
Travel agency (High street)	45.1%	--	52.3%	45.8%	45.8%
Online Travel Agency (OTA)	4.3%	--	7.3%	8.5%	9.6%
No need to book accommodation	4.3%	--	5.0%	3.1%	2.7%

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

	2012	2013	2014	2015	2016
Accommodation (**):	19.12	--	18.71	30.61	41.32
- Accommodation	17.74	--	17.78	27.34	39.67
- Additional accommodation expenses	1.38	--	0.93	3.27	1.65
Transport:	35.99	--	31.83	22.91	28.57
- Public transport	11.66	--	3.55	5.19	10.20
- Taxi	2.35	--	5.25	3.19	2.41
- Car rental	21.97	--	23.02	14.53	15.96
Food and drink:	114.58	--	100.97	82.21	91.40
- Food purchases at supermarkets	64.26	--	62.61	39.34	42.03
- Restaurants	50.32	--	38.36	42.87	49.36
Souvenirs:	44.19	--	53.12	44.82	42.23
Leisure:	45.00	--	47.16	39.15	38.99
- Organized excursions	22.08	--	29.42	15.40	20.25
- Leisure, amusement	6.69	--	12.15	7.30	6.96
- Trip to other islands	3.17	--	1.08	2.89	0.88
- Sporting activities	8.75	--	1.45	8.07	8.25
- Cultural activities	1.97	--	1.32	2.38	1.08
- Discos and disco-pubs	2.34	--	1.74	3.12	1.56
Others:	12.27	--	7.17	9.60	7.39
- Wellness	1.49	--	1.47	0.33	0.92
- Medical expenses	2.12	--	1.13	2.43	0.37
- Other expenses	8.66	--	4.57	6.83	6.11

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	42.4%	--	33.7%	30.4%	36.8%
- Tour Operator's website	51.7%	--	50.4%	65.4%	67.6%
Airline	10.5%	--	18.7%	17.3%	17.0%
- Airline's website	75.6%	--	72.3%	74.9%	81.7%
Travel agency (High street)	40.5%	--	41.8%	43.7%	39.8%
Online Travel Agency (OTA)	6.5%	--	5.8%	8.6%	6.4%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	5.1%	--	5.0%	4.0%	4.2%
4* Hotel	39.0%	--	39.7%	44.4%	37.6%
1-2-3* Hotel	27.1%	--	22.1%	17.5%	18.3%
Apartment	24.9%	--	24.8%	29.4%	35.3%
Property (privately-owned, friends, family)	3.0%	--	6.5%	3.5%	2.3%
Others	0.9%	--	1.9%	1.1%	2.3%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	59.3%	--	51.4%	49.8%	53.9%
Percentage of women	40.7%	--	48.6%	50.2%	46.1%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	40.4	--	40.0	41.6	40.9
Standard deviation	13.2	--	13.5	14.3	12.3

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	7.3%	--	10.0%	5.7%	8.6%
25-30 years old	20.7%	--	13.9%	24.0%	12.0%
31-45 years old	40.1%	--	48.4%	36.6%	46.9%
46-60 years old	23.1%	--	18.0%	22.1%	23.4%
Over 60 years old	8.9%	--	9.7%	11.5%	9.2%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	28.1%	--	32.7%	27.3%	27.6%
Upper/Middle management employee	45.5%	--	56.2%	48.2%	46.4%
Auxiliary level employee	8.6%	--	0.6%	9.9%	8.6%
Students	7.5%	--	4.4%	3.9%	5.2%
Retired	6.5%	--	4.3%	8.4%	8.0%
Unemployed / unpaid dom. work	3.7%	--	1.8%	2.2%	4.2%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	39.8%	--	35.3%	37.9%	30.6%
€24,001 - €36,000	22.5%	--	21.4%	20.8%	31.5%
€36,001 - €48,000	15.2%	--	13.9%	16.3%	20.2%
€48,001 - €60,000	6.1%	--	14.3%	9.6%	12.5%
€60,001 - €72,000	5.8%	--	5.4%	2.2%	0.6%
€72,001 - €84,000	1.7%	--	2.7%	2.9%	3.0%
More than €84,000	8.8%	--	7.0%	10.4%	1.7%

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.0%	--	0.0%	0.0%	1.5%
Between 2 and 7 days	18.2%	--	14.9%	10.1%	10.1%
Between 8 and 15 days	17.5%	--	8.6%	13.0%	4.9%
Between 16 and 30 days	16.8%	--	18.0%	24.6%	18.2%
Between 31 and 90 days	27.1%	--	20.8%	28.1%	33.8%
More than 90 days	20.4%	--	37.8%	24.2%	31.5%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	7.3%	--	7.5%	8.5%	11.3%
Flight and accommodation (room only)	5.9%	--	18.6%	16.4%	14.1%
Flight and accommodation (B&B)	9.2%	--	3.9%	2.1%	3.4%
Flight and accommodation (half board)	29.6%	--	21.0%	20.8%	21.1%
Flight and accommodation (full board)	7.4%	--	4.7%	7.6%	6.7%
Flight and accommodation (all inclusive)	40.6%	--	44.4%	44.6%	43.5%
% Tourists using low-cost airlines	43.3%	--	38.7%	44.0%	46.4%
Other expenses in their place of residence:					
- Car rental	17.7%	--	22.6%	17.4%	19.7%
- Sporting activities	5.6%	--	1.6%	7.7%	7.1%
- Excursions	16.2%	--	18.3%	13.4%	21.6%
- Trip to other islands	0.5%	--	2.2%	0.0%	1.9%

(*) 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)	2012	2013	2014	2015	2016
- Lanzarote	6,321	--	7,301	6,640	8,642
- Fuerteventura	7,226	--	5,110	7,746	7,385
- Gran Canaria	11,952	--	8,404	10,043	13,781
- Tenerife	12,125	--	15,047	13,717	24,714
- La Palma	588	--	1,339	1,152	4,391

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	16.5%	--	19.6%	16.9%	14.7%
- Fuerteventura	18.9%	--	13.7%	19.7%	12.5%
- Gran Canaria	31.3%	--	22.6%	25.6%	23.4%
- Tenerife	31.7%	--	40.4%	34.9%	42.0%
- La Palma	1.5%	--	3.6%	2.9%	7.5%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	10.1%	--	9.4%	5.2%	6.9%
Only with partner	37.3%	--	30.5%	37.5%	37.0%
Only with children (under the age of 13)	1.3%	--	2.2%	2.8%	2.5%
Partner + children (under the age of 13)	17.7%	--	22.5%	11.7%	14.2%
Other relatives	12.2%	--	11.5%	17.6%	13.8%
Friends	4.2%	--	8.0%	5.9%	5.5%
Work colleagues	0.4%	--	1.3%	0.0%	0.5%
Other combinations ⁽¹⁾	16.9%	--	14.6%	19.4%	19.7%

* 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)	95.2%	--	96.6%	94.6%	97.9%
Average rating (scale 1-10)	9.13	--	9.39	9.25	9.44

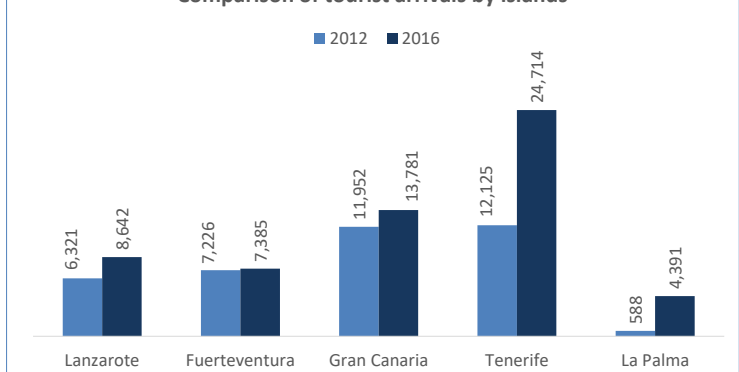
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	57.3%	--	58.6%	57.7%	50.6%
In love (at least 10 previous visits)	5.2%	--	8.4%	9.5%	7.4%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
Czech Republic	31,559	--	31,257	33,747	48,529
Germany	3,217	--	2,505	3,859	8,114
Spanish Mainland	753	--	722	763	1,236
United Kingdom	735	--	521	212	744
Italy	0	--	0	0	291
Austria	1,008	--	2,482	174	0
Poland	602	--	144	0	0
Russia	0	--	0	246	0
Switzerland	0	--	193	296	0
Belgium	0	--	0	0	0

Comparison of tourist arrivals by islands



Why do they choose the Canary Islands?

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	85.7%	--	86.0%	87.1%	86.2%
Security	10.9%	--	8.2%	10.7%	34.6%
Scenery	27.1%	--	35.7%	29.9%	29.9%
Tranquillity/rest/relaxation	36.5%	--	32.2%	30.4%	28.5%
Visiting new places	28.0%	--	20.3%	24.1%	27.2%
Beaches	31.7%	--	33.0%	39.6%	24.2%
Active tourism	10.3%	--	13.3%	13.8%	12.2%
Suitable destination for children	7.1%	--	15.0%	5.8%	6.9%
Price	6.8%	--	3.2%	3.6%	6.3%
Quality of the environment	0.6%	--	2.4%	4.1%	5.6%
Nightlife/fun	2.5%	--	2.0%	1.5%	5.3%
Nautical activities	2.6%	--	1.3%	2.8%	3.6%
Theme parks	6.3%	--	5.4%	3.8%	2.5%
Rural tourism	0.5%	--	0.9%	0.8%	1.7%
Ease of travel	1.9%	--	4.3%	1.5%	1.5%
Culture	4.1%	--	0.6%	0.7%	1.4%

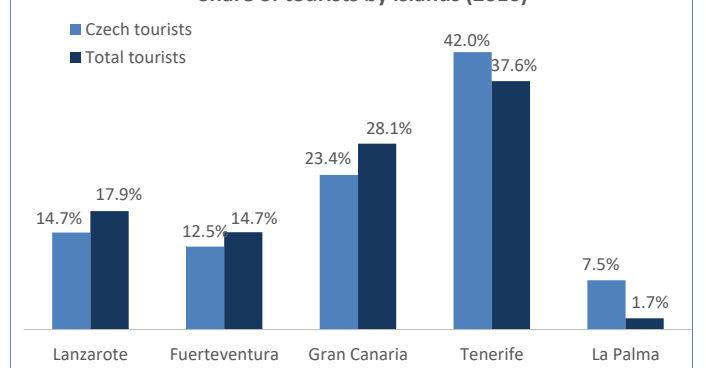
* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	52.3%	--	49.8%	48.4%	44.6%
Recommendation by friends or relatives	36.2%	--	36.3%	31.1%	42.1%
The Canary Islands television channel	0.5%	--	1.1%	0.0%	1.2%
Other television or radio channels	0.8%	--	1.5%	0.0%	1.5%
Information in the press/magazines/books	5.7%	--	9.4%	9.7%	6.7%
Attendance at a tourism fair	0.6%	--	2.6%	1.2%	2.7%
Tour Operator's brochure or catalogue	3.4%	--	4.2%	4.8%	1.5%
Recommendation by Travel Agency	17.8%	--	2.9%	11.1%	14.1%
Information obtained via the Internet	33.1%	--	34.3%	38.8%	40.3%
Senior Tourism programme	0.9%	--	2.6%	2.2%	1.3%
Others	6.2%	--	4.9%	6.1%	3.6%

* Multi-choice question

Share of tourists by islands (2016)



Source: Encuesta sobre el Gasto Turístico (ISTAC). The information of 2013 is not shown due to sample failure. (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.