

## Tourist profile trend (2017) Canary Islands



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



|  | 2013   | 2014   | 2015   | 2016   | 2017   |
|--|--------|--------|--------|--------|--------|
| Tourist arrivals (FRONTUR) (mill.)               | 12.19  | 12.92  | 13.30  | 14.98  | 15.98  |
| Tourist arrivals (> 16 years old) (mill.)        | 10.43  | 10.93  | 11.31  | 13.11  | 13.85  |
| Average daily expenditure (€)                    | 126.33 | 127.93 | 135.35 | 135.94 | 140.18 |
| - in their place of residence                    | 88.74  | 90.38  | 97.01  | 98.03  | 101.15 |
| - in the Canary Islands                          | 37.59  | 37.54  | 38.35  | 37.90  | 39.03  |
| Average length of stay                           | 9.56   | 9.57   | 9.55   | 9.36   | 9.17   |
| Turnover per tourist (€)                         | 1,076  | 1,090  | 1,149  | 1,141  | 1,155  |
| Total turnover (€m)                              | 13,119 | 14,084 | 15,283 | 17,086 | 18,450 |
| Tourist arrivals: year on year change            | --     | 6.0%   | 2.9%   | 12.6%  | 6.6%   |
| Turnover: year on year change                    | --     | 7.4%   | 8.5%   | 11.8%  | 8.0%   |
| <u>% tourists who pay in the Canary Islands:</u> |        |        |        |        |        |
| <b>Accommodation:</b>                            |        |        |        |        |        |
| - Accommodation                                  | 14.5%  | 13.0%  | 13.5%  | 14.1%  | 13.5%  |
| - Additional accommodation expenses              | 6.5%   | 6.2%   | 6.4%   | 6.4%   | 6.3%   |
| <b>Transport:</b>                                |        |        |        |        |        |
| - Public transport                               | 16.5%  | 15.5%  | 15.8%  | 15.1%  | 14.5%  |
| - Taxi   | 22.9%  | 22.5%  | 22.0%  | 21.8%  | 21.2%  |
| - Car rental                                     | 19.9%  | 18.8%  | 19.4%  | 18.6%  | 19.4%  |
| <b>Food and drink:</b>                           |        |        |        |        |        |
| - Food purchases at supermarkets                 | 58.6%  | 56.1%  | 55.7%  | 55.3%  | 55.0%  |
| - Restaurants                                    | 55.7%  | 54.8%  | 53.9%  | 53.7%  | 57.3%  |
| <b>Souvenirs:</b>                                | 58.0%  | 57.7%  | 54.9%  | 53.5%  | 53.3%  |
| <b>Leisure:</b>                                  |        |        |        |        |        |
| - Organized excursions                           | 19.3%  | 18.9%  | 18.0%  | 18.4%  | 17.7%  |
| - Leisure, amusement                             | 9.5%   | 9.1%   | 8.9%   | 8.6%   | 8.4%   |
| - Trip to other islands                          | 2.5%   | 2.5%   | 2.2%   | 2.4%   | 2.3%   |
| - Sporting activities                            | 6.8%   | 6.8%   | 6.3%   | 6.6%   | 6.1%   |
| - Cultural activities                            | 4.4%   | 4.7%   | 4.8%   | 4.6%   | 4.4%   |
| - Discos and disco-pubs                          | 8.0%   | 7.2%   | 7.8%   | 6.4%   | 6.1%   |
| <b>Others:</b>                                   |        |        |        |        |        |
| - Wellness                                       | 5.9%   | 5.6%   | 5.4%   | 5.5%   | 4.9%   |
| - Medical expenses                               | 4.2%   | 4.0%   | 4.0%   | 4.1%   | 4.0%   |
| - Other expenses                                 | 11.9%  | 10.0%  | 10.2%  | 9.0%   | 9.6%   |

2017



**+7%**  
**TOURISTS**  
15,975,507



**+1%**  
**TRAVEL EXPENSES**  
€1,155



**+8%**  
**TURNOVER**  
€18,450 MILL

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



|  | 2013  | 2014  | 2015  | 2016  | 2017  |
|--|-------|-------|-------|-------|-------|
| Flight only  | 10.8% | 10.4% | 10.0% | 8.8%  | 9.3%  |
| Flight and accommodation (room only)               | 26.5% | 25.0% | 25.5% | 25.7% | 26.9% |
| Flight and accommodation (B&B)                     | 7.3%  | 8.0%  | 8.0%  | 8.0%  | 8.3%  |
| Flight and accommodation (half board)              | 20.3% | 19.2% | 18.7% | 20.4% | 19.3% |
| Flight and accommodation (full board)              | 4.2%  | 4.4%  | 4.2%  | 4.3%  | 4.4%  |
| Flight and accommodation (all inclusive)           | 30.9% | 33.0% | 33.5% | 32.8% | 31.9% |
| <u>% Tourists using low-cost airlines</u>          | 42.9% | 43.3% | 46.2% | 48.7% | 50.8% |
| <u>Other expenses in their place of residence:</u> |       |       |       |       |       |
| - Car rental                                       | 11.1% | 10.7% | 11.4% | 11.8% | 12.6% |
| - Sporting activities                              | 5.7%  | 5.2%  | 5.5%  | 5.3%  | 5.1%  |
| - Excursions                                       | 4.9%  | 5.4%  | 5.7%  | 5.7%  | 6.2%  |
| - Trip to other islands                            | 1.7%  | 2.1%  | 2.0%  | 1.6%  | 1.5%  |

### How do they book?



|                                      | 2013  | 2014  | 2015  | 2016  | 2017  |
|--------------------------------------|-------|-------|-------|-------|-------|
| <b>Accommodation booking</b>         |       |       |       |       |       |
| <b>Tour Operator</b>                 | 42.8% | 45.4% | 44.0% | 42.3% | 42.4% |
| - Tour Operator's website            | 77.8% | 77.0% | 78.9% | 78.8% | 80.6% |
| <b>Accommodation</b>                 | 14.1% | 13.5% | 14.0% | 14.7% | 14.6% |
| - Accommodation's website            | 80.4% | 80.8% | 81.5% | 83.5% | 84.0% |
| <b>Travel agency (High street)</b>   | 21.1% | 20.3% | 19.6% | 20.5% | 19.3% |
| <b>Online Travel Agency (OTA)</b>    | 14.8% | 13.9% | 15.5% | 16.5% | 17.3% |
| <b>No need to book accommodation</b> | 7.2%  | 6.9%  | 6.9%  | 6.0%  | 6.4%  |

|                                    | 2013  | 2014  | 2015  | 2016  | 2017  |
|------------------------------------|-------|-------|-------|-------|-------|
| <b>Flight booking</b>              |       |       |       |       |       |
| <b>Tour Operator</b>               | 45.2% | 47.5% | 46.4% | 44.6% | 44.8% |
| - Tour Operator's website          | 75.6% | 75.9% | 77.6% | 76.3% | 78.6% |
| <b>Airline</b>                     | 23.9% | 23.1% | 24.3% | 24.8% | 25.8% |
| - Airline's website                | 95.8% | 96.1% | 95.9% | 96.2% | 97.3% |
| <b>Travel agency (High street)</b> | 19.8% | 19.1% | 18.4% | 19.1% | 18.0% |
| <b>Online Travel Agency (OTA)</b>  | 11.0% | 10.4% | 11.0% | 11.5% | 11.4% |

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



|                         | 2013  | 2014  | 2015  | 2016  | 2017  |
|-------------------------|-------|-------|-------|-------|-------|
| The same day they leave | 0.6%  | 0.6%  | 0.6%  | 0.6%  | 0.5%  |
| Between 2 and 7 days    | 9.1%  | 8.5%  | 7.1%  | 6.3%  | 5.9%  |
| Between 8 and 15 days   | 11.0% | 9.6%  | 8.7%  | 7.9%  | 7.4%  |
| Between 16 and 30 days  | 16.9% | 16.1% | 15.2% | 14.7% | 13.4% |
| Between 31 and 90 days  | 32.1% | 32.1% | 34.0% | 34.3% | 34.6% |
| More than 90 days       | 30.3% | 33.1% | 34.4% | 36.2% | 38.3% |

### Who are they?



|               | 2013  | 2014  | 2015  | 2016  | 2017  |
|---------------|-------|-------|-------|-------|-------|
| <b>Gender</b> |       |       |       |       |       |
| Men           | 49.4% | 49.6% | 49.5% | 48.5% | 48.1% |
| Women         | 50.6% | 50.4% | 50.5% | 51.5% | 51.9% |

#### Age

|                                       |      |      |      |      |      |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 43.3 | 44.4 | 45.0 | 46.3 | 46.9 |
| Standard deviation                    | 14.3 | 14.5 | 14.8 | 15.3 | 15.5 |

#### Age range (> 16 years old)

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| 16-24 years old   | 9.6%  | 9.3%  | 9.1%  | 8.2%  | 8.4%  |
| 25-30 years old   | 13.4% | 12.2% | 11.9% | 11.1% | 10.2% |
| 31-45 years old   | 33.8% | 31.4% | 30.4% | 29.1% | 27.9% |
| 46-60 years old   | 29.6% | 31.8% | 31.9% | 30.9% | 31.7% |
| Over 60 years old | 13.5% | 15.3% | 16.7% | 20.7% | 21.8% |

#### Occupation

|                                  |       |       |       |       |       |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed  | 23.4% | 24.0% | 23.6% | 23.1% | 23.8% |
| Upper/Middle management employee | 37.5% | 38.1% | 37.4% | 36.1% | 35.2% |
| Auxiliary level employee         | 17.9% | 16.4% | 16.7% | 15.5% | 15.3% |
| Students                         | 6.2%  | 5.3%  | 5.5%  | 5.1%  | 5.0%  |
| Retired                          | 12.2% | 13.6% | 14.3% | 18.0% | 18.6% |
| Unemployed / unpaid dom. work    | 2.8%  | 2.5%  | 2.4%  | 2.2%  | 2.1%  |

#### Annual household income level

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 18.8% | 18.3% | 18.0% | 17.8% | 17.9% |
| €24,001 - €36,000 | 20.1% | 19.5% | 18.7% | 19.4% | 19.3% |
| €36,001 - €48,000 | 16.4% | 16.7% | 17.0% | 16.9% | 16.1% |
| €48,001 - €60,000 | 14.6% | 14.9% | 14.7% | 14.6% | 15.1% |
| €60,001 - €72,000 | 9.0%  | 9.0%  | 9.2%  | 9.5%  | 9.3%  |
| €72,001 - €84,000 | 6.0%  | 5.8%  | 6.1%  | 6.0%  | 6.3%  |
| More than €84,000 | 15.0% | 15.7% | 16.2% | 15.8% | 16.0% |

## Tourist profile trend (2017)

### Canary Islands



#### Which island do they choose?



| Tourists (> 16 years old) | 2013      | 2014      | 2015      | 2016      | 2017      |
|---------------------------|-----------|-----------|-----------|-----------|-----------|
| - Lanzarote               | 1,820,148 | 1,911,659 | 2,033,971 | 2,328,674 | 2,488,213 |
| - Fuerteventura           | 1,514,524 | 1,595,143 | 1,668,484 | 1,914,107 | 1,938,908 |
| - Gran Canaria            | 2,876,750 | 3,001,310 | 3,104,724 | 3,654,806 | 3,900,824 |
| - Tenerife                | 3,996,638 | 4,193,228 | 4,249,936 | 4,885,901 | 5,144,415 |
| - La Palma                | 143,472   | 138,916   | 163,425   | 221,541   | 277,952   |

#### Where do they stay?



|   | 2013  | 2014  | 2015  | 2016  | 2017  |
|---|-------|-------|-------|-------|-------|
| 5* Hotel                                    | 7.3%  | 7.3%  | 7.3%  | 7.1%  | 6.8%  |
| 4* Hotel                                    | 37.3% | 37.9% | 38.1% | 39.6% | 38.4% |
| 1-2-3* Hotel                                | 15.5% | 16.0% | 15.3% | 14.6% | 14.4% |
| Apartment                                   | 31.1% | 29.7% | 30.3% | 31.5% | 32.4% |
| Property (privately-owned, friends, family) | 6.2%  | 6.2%  | 6.0%  | 4.6%  | 4.8%  |
| Others                                      | 2.6%  | 3.0%  | 2.9%  | 2.6%  | 3.2%  |

#### Who do they come with?



|  | 2013  | 2014  | 2015  | 2016  | 2017  |
|--|-------|-------|-------|-------|-------|
| Unaccompanied                            | 10.8% | 9.9%  | 9.4%  | 9.1%  | 8.7%  |
| Only with partner                        | 47.7% | 47.9% | 49.3% | 47.6% | 46.8% |
| Only with children (under the age of 13) | 1.4%  | 1.5%  | 1.3%  | 1.5%  | 1.7%  |
| Partner + children (under the age of 13) | 11.1% | 11.8% | 11.3% | 11.8% | 11.9% |
| Other relatives                          | 6.0%  | 5.7%  | 6.2%  | 6.0%  | 6.0%  |
| Friends                                  | 6.3%  | 6.2%  | 6.0%  | 6.1%  | 6.1%  |
| Work colleagues                          | 0.4%  | 0.4%  | 0.4%  | 0.3%  | 0.3%  |
| Other combinations <sup>(1)</sup>        | 16.2% | 16.7% | 16.2% | 17.5% | 18.5% |

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

#### How do they rate the Canary Islands?



| Opinion on their stay          | 2013  | 2014  | 2015  | 2016  | 2017  |
|--------------------------------|-------|-------|-------|-------|-------|
| Good or very good (% tourists) | 93.1% | 94.0% | 93.2% | 94.1% | 94.0% |
| Average rating (scale 1-10)    | 8.79  | 8.85  | 8.83  | 8.90  | 8.92  |

#### How many are loyal to the Canary Islands?



| Repeat tourists             | 2013  | 2014  | 2015  | 2016  | 2017  |
|-----------------------------|-------|-------|-------|-------|-------|
| At least 1 previous visit   | 76.5% | 76.7% | 76.8% | 77.3% | 77.3% |
| At least 10 previous visits | 16.4% | 15.8% | 16.9% | 16.1% | 16.9% |

#### Where are they from?



| Tourists (> 16 years old) | 2013  | 2014  | 2015  | 2016  | 2017  |
|---------------------------|-------|-------|-------|-------|-------|
| United Kingdom            | 29.4% | 30.6% | 31.4% | 32.2% | 32.7% |
| Germany                   | 20.9% | 21.4% | 20.7% | 20.8% | 20.3% |
| Spanish Mainland          | 12.4% | 11.1% | 11.1% | 11.2% | 10.7% |
| Netherlands               | 3.9%  | 3.7%  | 3.8%  | 4.1%  | 4.1%  |
| Sweden                    | 4.8%  | 4.6%  | 4.4%  | 3.9%  | 3.8%  |
| France                    | 3.0%  | 3.5%  | 4.0%  | 3.8%  | 3.5%  |
| Italy                     | 2.2%  | 2.5%  | 3.0%  | 3.3%  | 3.5%  |
| Ireland                   | 3.3%  | 3.2%  | 3.3%  | 3.1%  | 3.2%  |
| Norway                    | 4.4%  | 4.0%  | 3.4%  | 2.9%  | 2.9%  |
| Others                    | 15.8% | 15.5% | 14.8% | 14.7% | 15.4% |

| Share (%)       | 2013  | 2014  | 2015  | 2016  | 2017  |
|-----------------|-------|-------|-------|-------|-------|
| - Lanzarote     | 17.6% | 17.6% | 18.1% | 17.9% | 18.1% |
| - Fuerteventura | 14.6% | 14.7% | 14.9% | 14.7% | 14.1% |
| - Gran Canaria  | 27.8% | 27.7% | 27.7% | 28.1% | 28.4% |
| - Tenerife      | 38.6% | 38.7% | 37.9% | 37.6% | 37.4% |
| - La Palma      | 1.4%  | 1.3%  | 1.5%  | 1.7%  | 2.0%  |

#### Why do they choose the Canary Islands?



| Aspects influencing the choice    | 2013  | 2014  | 2015  | 2016  | 2017  |
|-----------------------------------|-------|-------|-------|-------|-------|
| Climate/sun                       | 90.3% | 90.1% | 89.6% | 89.8% | 89.8% |
| Tranquillity/rest/relaxation      | 39.2% | 38.9% | 38.3% | 36.6% | 37.2% |
| Beaches                           | 34.7% | 34.2% | 33.8% | 34.5% | 35.1% |
| Scenery                           | 20.2% | 21.6% | 22.7% | 21.9% | 22.9% |
| Visiting new places               | 14.2% | 14.6% | 14.2% | 14.6% | 14.7% |
| Price                             | 14.3% | 14.8% | 14.0% | 12.7% | 12.2% |
| Security                          | 5.2%  | 5.1%  | 7.6%  | 11.1% | 9.7%  |
| Ease of travel                    | 9.0%  | 8.5%  | 8.5%  | 8.9%  | 8.9%  |
| Suitable destination for children | 7.6%  | 8.0%  | 7.3%  | 7.5%  | 7.6%  |
| Quality of the environment        | 6.1%  | 6.1%  | 6.6%  | 6.5%  | 6.5%  |
| Active tourism                    | 4.8%  | 5.0%  | 5.2%  | 5.1%  | 5.4%  |
| Nightlife/fun                     | 5.2%  | 4.4%  | 4.2%  | 3.8%  | 3.8%  |
| Theme parks                       | 2.6%  | 2.8%  | 3.0%  | 3.0%  | 3.1%  |
| Culture                           | 2.6%  | 2.5%  | 2.7%  | 2.6%  | 2.7%  |
| Shopping                          | 2.7%  | 2.9%  | 3.0%  | 2.6%  | 2.5%  |
| Nautical activities               | 2.3%  | 2.3%  | 2.1%  | 2.2%  | 2.0%  |

\* Multi-choice question

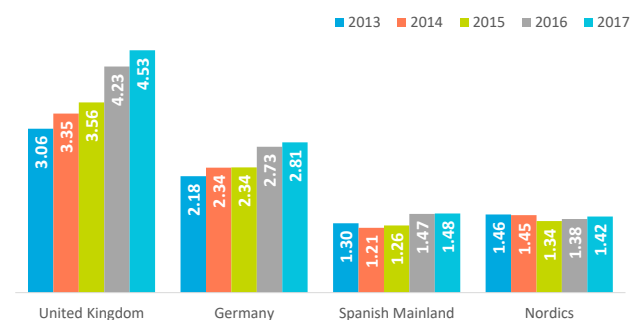
#### What did motivate them to come?



| Prescription sources                  | 2013  | 2014  | 2015  | 2016  | 2017  |
|---------------------------------------|-------|-------|-------|-------|-------|
| Previous visits to the Canary Islands | 64.0% | 64.2% | 64.5% | 64.1% | 64.9% |
| Recommendation by friends/relatives   | 34.5% | 34.1% | 34.2% | 34.5% | 35.0% |
| The Canary Islands television channel | 0.3%  | 0.4%  | 0.4%  | 0.3%  | 0.4%  |
| Other television or radio channels    | 0.7%  | 0.8%  | 0.7%  | 0.8%  | 1.0%  |
| Information in press/magazines/books  | 4.0%  | 4.0%  | 3.8%  | 3.8%  | 3.8%  |
| Attendance at a tourism fair          | 0.5%  | 0.5%  | 0.5%  | 0.5%  | 0.5%  |
| Tour Operator's brochure or catalogue | 9.0%  | 9.0%  | 8.4%  | 8.0%  | 7.2%  |
| Recommendation by Travel Agency       | 9.9%  | 9.6%  | 9.5%  | 9.7%  | 9.3%  |
| Information obtained via the Internet | 26.6% | 26.1% | 25.7% | 25.8% | 25.5% |
| Senior Tourism programme              | 0.3%  | 0.3%  | 0.2%  | 0.2%  | 0.2%  |
| Others                                | 7.2%  | 6.9%  | 6.5%  | 6.1%  | 5.9%  |

\* Multi-choice question

#### Main markets: tourist arrivals (million)



Tourists over 16 years old.

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.