

# Tourist profile trend (2017)

## Canary Islands: Fourth Quarter



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



|   | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|---|--------|--------|--------|--------|--------|
| Tourist arrivals (FRONTUR) (mill.)        | 3.45   | 3.43   | 3.62   | 4.02   | 4.18   |
| Tourist arrivals (> 16 years old) (mill.) | 2.98   | 2.88   | 3.13   | 3.54   | 3.75   |
| Average daily expenditure (€)             | 133.47 | 134.42 | 139.88 | 143.77 | 147.79 |
| . in their place of residence             | 94.90  | 96.00  | 99.88  | 104.98 | 108.47 |
| . in the Canary Islands                   | 38.58  | 38.42  | 40.00  | 38.79  | 39.31  |
| Average length of stay                    | 8.92   | 9.18   | 9.19   | 8.78   | 8.91   |
| Turnover per tourist (€)                  | 1,065  | 1,092  | 1,157  | 1,154  | 1,197  |
| Total turnover (> 16 years old) (€m)      | 3,672  | 3,746  | 4,187  | 4,636  | 5,001  |
| Share of annual tourist                   | 28.3%  | 26.5%  | 27.2%  | 26.8%  | 26.2%  |
| Share of annual turnover                  | 28.0%  | 26.6%  | 27.4%  | 27.1%  | 27.1%  |

#### % tourists who pay in the Canary Islands:

##### Accommodation:

|                                     |       |       |       |       |       |
|-------------------------------------|-------|-------|-------|-------|-------|
| - Accommodation                     | 14.2% | 12.2% | 13.6% | 14.1% | 12.8% |
| - Additional accommodation expenses | 5.6%  | 6.6%  | 5.9%  | 5.8%  | 5.9%  |

##### Transport:

|                    |       |       |       |       |       |
|--------------------|-------|-------|-------|-------|-------|
| - Public transport | 15.9% | 14.9% | 15.5% | 15.4% | 14.5% |
| - Taxi             | 22.6% | 21.8% | 21.3% | 22.5% | 21.0% |
| - Car rental       | 18.8% | 18.6% | 18.1% | 18.5% | 19.2% |

##### Food and drink:

|                                  |       |       |       |       |       |
|----------------------------------|-------|-------|-------|-------|-------|
| - Food purchases at supermarkets | 59.4% | 55.0% | 55.1% | 56.4% | 54.9% |
| - Restaurants                    | 54.8% | 56.4% | 55.3% | 55.3% | 58.6% |

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| <b>Souvenirs:</b> | 57.4% | 56.8% | 51.8% | 53.1% | 52.0% |
|-------------------|-------|-------|-------|-------|-------|

##### Leisure:

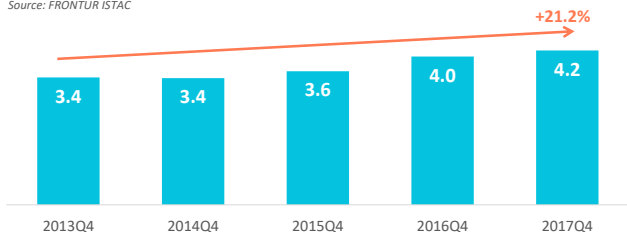
|                         |       |       |       |       |       |
|-------------------------|-------|-------|-------|-------|-------|
| - Organized excursions  | 18.5% | 16.6% | 15.7% | 16.4% | 16.3% |
| - Leisure, amusement    | 8.7%  | 8.7%  | 7.7%  | 7.9%  | 8.0%  |
| - Trip to other islands | 1.9%  | 2.2%  | 2.0%  | 2.1%  | 2.1%  |
| - Sporting activities   | 6.6%  | 6.2%  | 5.6%  | 6.0%  | 6.3%  |
| - Cultural activities   | 4.1%  | 4.2%  | 4.6%  | 4.1%  | 4.8%  |
| - Discos and disco-pubs | 7.0%  | 6.5%  | 6.9%  | 5.9%  | 5.2%  |

##### Others:

|                    |       |      |       |      |      |
|--------------------|-------|------|-------|------|------|
| - Wellness         | 5.7%  | 5.7% | 5.6%  | 5.8% | 4.8% |
| - Medical expenses | 3.5%  | 3.4% | 3.6%  | 4.2% | 3.9% |
| - Other expenses   | 11.0% | 9.7% | 10.0% | 9.1% | 8.6% |

#### TOURIST ARRIVALS (million)

Source: FRONTUR ISTAC



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



|  | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|--|--------|--------|--------|--------|--------|
| Flight only  | 9.2%   | 10.5%  | 9.8%   | 8.6%   | 8.8%   |
| Flight and accommodation (room only)               | 26.7%  | 25.3%  | 27.0%  | 27.4%  | 28.2%  |
| Flight and accommodation (B&B)                     | 8.8%   | 9.7%   | 8.8%   | 8.7%   | 8.3%   |
| Flight and accommodation (half board)              | 19.2%  | 18.4%  | 18.4%  | 19.5%  | 18.9%  |
| Flight and accommodation (full board)              | 4.4%   | 4.5%   | 4.4%   | 4.2%   | 4.5%   |
| Flight and accommodation (all inclusive)           | 31.7%  | 31.7%  | 31.6%  | 31.6%  | 31.3%  |
| % Tourists using low-cost airlines                 | 42.7%  | 42.1%  | 45.3%  | 47.5%  | 49.9%  |
| <b>Other expenses in their place of residence:</b> |        |        |        |        |        |
| - Car rental                                       | 10.9%  | 11.1%  | 11.1%  | 11.7%  | 12.7%  |
| - Sporting activities                              | 5.8%   | 5.1%   | 5.0%   | 5.2%   | 5.0%   |
| - Excursions                                       | 5.0%   | 5.1%   | 5.5%   | 5.3%   | 5.8%   |
| - Trip to other islands                            | 2.4%   | 2.3%   | 2.5%   | 1.5%   | 1.7%   |

### How do they book?



|                                      | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|--------------------------------------|--------|--------|--------|--------|--------|
| <b>Accommodation booking</b>         |        |        |        |        |        |
| <b>Tour Operator</b>                 | 45.3%  | 46.7%  | 46.4%  | 43.2%  | 43.5%  |
| - Tour Operator's website            | 81.7%  | 77.8%  | 80.2%  | 79.4%  | 80.7%  |
| <b>Accommodation</b>                 | 12.8%  | 14.0%  | 13.2%  | 15.3%  | 14.3%  |
| - Accommodation's website            | 83.2%  | 80.5%  | 82.2%  | 83.5%  | 84.5%  |
| <b>Travel agency (High street)</b>   | 20.6%  | 19.0%  | 18.2%  | 19.2%  | 18.9%  |
| <b>Online Travel Agency (OTA)</b>    | 14.7%  | 13.6%  | 15.3%  | 16.4%  | 17.2%  |
| <b>No need to book accommodation</b> | 6.7%   | 6.7%   | 6.9%   | 5.9%   | 6.1%   |

|                                    | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|------------------------------------|--------|--------|--------|--------|--------|
| <b>Flight booking</b>              |        |        |        |        |        |
| <b>Tour Operator</b>               | 48.1%  | 48.4%  | 48.3%  | 46.5%  | 45.5%  |
| - Tour Operator's website          | 79.5%  | 77.1%  | 79.6%  | 76.4%  | 78.0%  |
| <b>Airline</b>                     | 21.8%  | 23.3%  | 23.9%  | 25.0%  | 26.2%  |
| - Airline's website                | 96.4%  | 96.4%  | 95.3%  | 96.2%  | 97.4%  |
| <b>Travel agency (High street)</b> | 19.3%  | 18.3%  | 17.3%  | 18.0%  | 17.4%  |
| <b>Online Travel Agency (OTA)</b>  | 10.8%  | 10.0%  | 10.4%  | 10.6%  | 10.9%  |

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



|                         | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.9%   | 0.5%   | 0.6%   | 0.5%   | 0.4%   |
| Between 2 and 7 days    | 10.2%  | 8.8%   | 7.2%   | 6.2%   | 4.9%   |
| Between 8 and 15 days   | 10.7%  | 9.4%   | 8.4%   | 6.6%   | 6.9%   |
| Between 16 and 30 days  | 15.4%  | 15.5%  | 15.1%  | 14.6%  | 12.9%  |
| Between 31 and 90 days  | 33.1%  | 33.5%  | 35.6%  | 35.7%  | 35.4%  |
| More than 90 days       | 29.7%  | 32.4%  | 33.2%  | 36.5%  | 39.6%  |

### Who are they?



|               | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|---------------|--------|--------|--------|--------|--------|
| <b>Gender</b> |        |        |        |        |        |
| Men           | 49.5%  | 50.0%  | 50.0%  | 49.4%  | 49.3%  |
| Women         | 50.5%  | 50.0%  | 50.0%  | 50.6%  | 50.7%  |

#### Age

|                                       |      |      |      |      |      |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 44.0 | 46.0 | 47.0 | 47.3 | 49.1 |
| Standard deviation                    | 13.6 | 13.9 | 14.8 | 14.8 | 15.0 |

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

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| 16-24 years old   | 6.9%  | 6.2%  | 6.6%  | 6.3%  | 5.7%  |
| 25-30 years old   | 12.9% | 10.3% | 11.0% | 9.5%  | 8.3%  |
| 31-45 years old   | 35.1% | 32.0% | 28.1% | 30.1% | 26.8% |
| 46-60 years old   | 32.3% | 35.3% | 34.0% | 32.5% | 33.5% |
| Over 60 years old | 12.7% | 16.2% | 20.4% | 21.6% | 25.7% |

#### Occupation

|                                  |       |       |       |       |       |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed  | 24.0% | 24.4% | 23.3% | 23.7% | 23.2% |
| Upper/Middle management employee | 40.3% | 39.3% | 36.6% | 37.2% | 34.5% |
| Auxiliary level employee         | 17.6% | 15.4% | 16.0% | 14.7% | 15.0% |
| Students                         | 3.7%  | 3.7%  | 3.9%  | 4.0%  | 3.5%  |
| Retired                          | 11.4% | 14.7% | 17.8% | 18.3% | 21.8% |
| Unemployed / unpaid dom. work    | 2.9%  | 2.5%  | 2.4%  | 2.0%  | 2.1%  |

#### Annual household income level

|                   |       |       |       |       |       |
|-------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 16.4% | 16.2% | 16.7% | 16.4% | 16.2% |
| €24,001 - €36,000 | 18.7% | 17.6% | 18.7% | 18.4% | 18.1% |
| €36,001 - €48,000 | 17.1% | 16.3% | 16.8% | 16.6% | 16.0% |
| €48,001 - €60,000 | 14.4% | 15.7% | 14.5% | 14.7% | 15.6% |
| €60,001 - €72,000 | 10.5% | 9.3%  | 9.6%  | 9.7%  | 10.0% |
| €72,001 - €84,000 | 6.6%  | 6.3%  | 6.1%  | 6.6%  | 6.6%  |
| More than €84,000 | 16.5% | 18.5% | 17.7% | 17.7% | 17.4% |

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### Canary Islands: Fourth Quarter



#### Which island do they choose?



| Tourists (> 16 years old) | 2013Q4    | 2014Q4    | 2015Q4    | 2016Q4    | 2017Q4    |
|---------------------------|-----------|-----------|-----------|-----------|-----------|
| - Lanzarote               | 482,417   | 467,397   | 527,062   | 600,909   | 658,457   |
| - Fuerteventura           | 407,337   | 398,938   | 437,284   | 495,222   | 513,386   |
| - Gran Canaria            | 901,778   | 863,399   | 951,656   | 1,064,140 | 1,108,297 |
| - Tenerife                | 1,123,476 | 1,092,650 | 1,144,231 | 1,280,669 | 1,357,305 |
| - La Palma                | 35,785    | 37,346    | 45,080    | 65,961    | 86,566    |

#### Where do they stay?



|   | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|---|--------|--------|--------|--------|--------|
| 5* Hotel                                    | 7.3%   | 7.3%   | 7.4%   | 6.4%   | 6.5%   |
| 4* Hotel                                    | 36.4%  | 37.8%  | 36.8%  | 38.7%  | 36.5%  |
| 1-2-3* Hotel                                | 16.4%  | 15.7%  | 14.8%  | 13.9%  | 15.3%  |
| Apartment                                   | 30.1%  | 29.7%  | 31.3%  | 33.6%  | 33.7%  |
| Property (privately-owned, friends, family) | 5.8%   | 5.9%   | 6.1%   | 4.4%   | 4.1%   |
| Others                                      | 4.0%   | 3.6%   | 3.7%   | 2.9%   | 3.9%   |

#### Who do they come with?



|  | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied                            | 12.1%  | 10.6%  | 10.6%  | 9.1%   | 9.0%   |
| Only with partner                        | 47.7%  | 47.2%  | 51.3%  | 44.4%  | 46.4%  |
| Only with children (under the age of 13) | 1.3%   | 1.3%   | 1.1%   | 1.6%   | 1.4%   |
| Partner + children (under the age of 13) | 9.5%   | 12.4%  | 9.1%   | 12.5%  | 10.8%  |
| Other relatives                          | 5.9%   | 6.0%   | 6.4%   | 7.3%   | 6.4%   |
| Friends                                  | 5.7%   | 5.4%   | 5.4%   | 5.3%   | 5.6%   |
| Work colleagues                          | 0.3%   | 0.5%   | 0.4%   | 0.4%   | 0.3%   |
| Other combinations <sup>(1)</sup>        | 17.5%  | 16.6%  | 15.5%  | 19.5%  | 20.0%  |

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

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



| Impression of their stay       | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 93.6%  | 94.4%  | 94.0%  | 92.8%  | 94.0%  |
| Average rating (scale 1-10)    | 8.79   | 8.86   | 8.90   | 8.81   | 8.94   |

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



| Repeat tourists             | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|-----------------------------|--------|--------|--------|--------|--------|
| At least 1 previous visit   | 77.1%  | 79.2%  | 79.4%  | 79.3%  | 79.6%  |
| At least 10 previous visits | 16.8%  | 17.4%  | 18.9%  | 17.8%  | 18.6%  |

#### Where are they from?



|                  | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|------------------|--------|--------|--------|--------|--------|
| United Kingdom   | 26.9%  | 28.4%  | 30.1%  | 30.8%  | 30.1%  |
| Germany          | 22.8%  | 22.5%  | 21.5%  | 21.7%  | 22.0%  |
| Spanish Mainland | 9.3%   | 9.0%   | 8.6%   | 8.8%   | 8.4%   |
| Sweden           | 7.3%   | 6.7%   | 6.4%   | 6.1%   | 5.5%   |
| Norway           | 6.1%   | 5.3%   | 4.8%   | 4.2%   | 4.1%   |
| Netherlands      | 3.6%   | 3.6%   | 3.7%   | 3.8%   | 4.0%   |
| Ireland          | 2.5%   | 2.5%   | 2.8%   | 2.8%   | 3.0%   |
| Italy            | 1.9%   | 2.4%   | 2.6%   | 3.0%   | 2.9%   |
| France           | 2.4%   | 2.7%   | 3.1%   | 2.7%   | 2.7%   |
| Others           | 17.2%  | 16.9%  | 16.4%  | 16.1%  | 17.4%  |

| Share (%)       | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote     | 16.3%  | 16.3%  | 17.0%  | 17.1%  | 17.7%  |
| - Fuerteventura | 13.8%  | 14.0%  | 14.1%  | 14.1%  | 13.8%  |
| - Gran Canaria  | 30.6%  | 30.2%  | 30.6%  | 30.3%  | 29.8%  |
| - Tenerife      | 38.1%  | 38.2%  | 36.8%  | 36.5%  | 36.4%  |
| - La Palma      | 1.2%   | 1.3%   | 1.5%   | 1.9%   | 2.3%   |

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



| Aspects influencing the choice    | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun                       | 91.7%  | 91.2%  | 91.7%  | 91.7%  | 92.2%  |
| Tranquillity/rest/relaxation      | 40.3%  | 39.8%  | 38.9%  | 37.4%  | 39.3%  |
| Beaches                           | 34.5%  | 33.3%  | 34.4%  | 34.3%  | 35.4%  |
| Scenery                           | 19.9%  | 20.7%  | 22.5%  | 20.8%  | 22.6%  |
| Visiting new places               | 14.0%  | 12.4%  | 12.1%  | 13.5%  | 12.9%  |
| Price                             | 12.9%  | 13.6%  | 12.4%  | 11.4%  | 9.6%   |
| Security                          | 5.9%   | 5.8%   | 9.5%   | 10.7%  | 9.4%   |
| Ease of travel                    | 9.2%   | 9.3%   | 8.8%   | 9.3%   | 9.2%   |
| Suitable destination for children | 7.6%   | 8.1%   | 6.1%   | 7.9%   | 7.1%   |
| Quality of the environment        | 5.5%   | 6.0%   | 6.2%   | 6.0%   | 6.1%   |
| Active tourism                    | 4.8%   | 5.3%   | 5.4%   | 5.0%   | 6.0%   |
| Nightlife/fun                     | 4.4%   | 3.9%   | 3.7%   | 3.5%   | 3.0%   |
| Theme parks                       | 2.2%   | 2.3%   | 2.3%   | 2.4%   | 2.3%   |
| Shopping                          | 2.6%   | 3.0%   | 2.9%   | 3.0%   | 2.3%   |
| Culture                           | 2.3%   | 2.4%   | 2.4%   | 2.4%   | 2.2%   |
| Nautical activities               | 2.4%   | 2.0%   | 2.0%   | 2.2%   | 2.1%   |

\* Multi-choice question

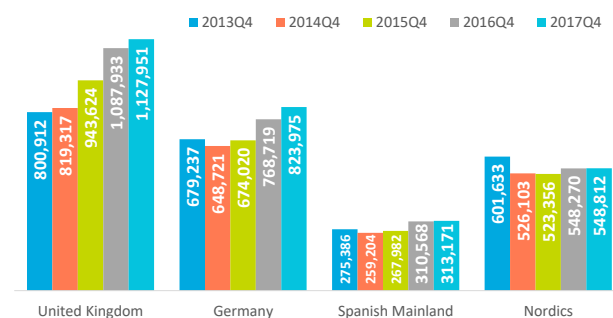
#### What did motivate them to come?



| Prescription sources                  | 2013Q4 | 2014Q4 | 2015Q4 | 2016Q4 | 2017Q4 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 64.8%  | 67.3%  | 68.2%  | 66.9%  | 67.3%  |
| Recommendation by friends/relatives   | 32.7%  | 32.8%  | 32.8%  | 33.3%  | 33.8%  |
| The Canary Islands television channel | 0.3%   | 0.3%   | 0.3%   | 0.3%   | 0.2%   |
| Other television or radio channels    | 0.7%   | 0.8%   | 0.7%   | 0.6%   | 0.9%   |
| Information in press/magazines/books  | 4.0%   | 3.7%   | 3.5%   | 3.8%   | 3.6%   |
| Attendance at a tourism fair          | 0.4%   | 0.5%   | 0.4%   | 0.4%   | 0.4%   |
| Tour Operator's brochure or catalogue | 8.3%   | 7.4%   | 7.3%   | 7.2%   | 6.7%   |
| Recommendation by Travel Agency       | 9.1%   | 9.0%   | 8.5%   | 9.2%   | 8.5%   |
| Information obtained via the Internet | 26.6%  | 24.6%  | 24.2%  | 25.1%  | 24.5%  |
| Senior Tourism programme              | 0.2%   | 0.2%   | 0.2%   | 0.2%   | 0.3%   |
| Others                                | 7.7%   | 7.3%   | 6.9%   | 6.0%   | 6.2%   |

\* Multi-choice question

#### Main markets: tourist arrivals



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.