

Tourist profile trend (2017)

Canary Islands: First Quarter



How many are they and how much do they spend?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Tourist arrivals (> 16 years old) | 2,739,879 | 2,942,153 | 3,000,867 | 3,386,316 | 3,539,267 |
| Average daily expenditure (€) | 128.21 | 127.65 | 133.56 | 137.52 | 144.13 |
| . in their place of residence | 89.44 | 89.21 | 95.59 | 99.29 | 104.55 |
| . in the Canary Islands | 38.77 | 38.44 | 37.97 | 38.23 | 39.58 |
| Average length of stay | 10.10 | 10.25 | 10.28 | 10.04 | 9.61 |
| Turnover per tourist (€) | 1,148 | 1,144 | 1,183 | 1,203 | 1,215 |
| Total turnover (> 16 years old) (€m) | 3,146 | 3,366 | 3,549 | 4,073 | 4,299 |
| Share of total turnover | 28.0% | 28.3% | 27.3% | 27.2% | -- |
| Share of total tourist | 26.3% | 26.9% | 26.5% | 25.8% | -- |

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

| | | | | | |
|-------------------------------------|--------|--------|--------|--------|--------|
| Accommodation (**): | 47.25 | 46.87 | 47.52 | 50.89 | 52.94 |
| - Accommodation | 42.70 | 41.79 | 41.65 | 44.35 | 45.31 |
| - Additional accommodation expenses | 4.54 | 5.07 | 5.87 | 6.54 | 7.63 |
| Transport: | 30.74 | 28.43 | 30.20 | 28.79 | 27.53 |
| - Public transport | 6.45 | 5.64 | 5.74 | 5.90 | 5.37 |
| - Taxi | 7.94 | 7.70 | 7.54 | 7.53 | 7.29 |
| - Car rental | 16.35 | 15.09 | 16.92 | 15.36 | 14.86 |
| Food and drink: | 172.98 | 172.54 | 174.31 | 169.39 | 165.45 |
| - Food purchases at supermarkets | 73.66 | 76.87 | 81.61 | 76.33 | 69.11 |
| - Restaurants | 99.32 | 95.67 | 92.70 | 93.06 | 96.33 |
| Souvenirs: | 58.80 | 59.58 | 56.11 | 50.73 | 53.08 |
| Leisure: | 33.15 | 32.16 | 31.98 | 30.74 | 27.18 |
| - Organized excursions | 12.19 | 13.33 | 12.15 | 12.00 | 10.57 |
| - Leisure, amusement | 3.92 | 4.11 | 3.45 | 3.27 | 3.31 |
| - Trip to other islands | 1.76 | 1.41 | 1.51 | 1.64 | 1.80 |
| - Sporting activities | 5.42 | 5.36 | 5.43 | 5.84 | 4.69 |
| - Cultural activities | 1.77 | 1.79 | 2.08 | 2.14 | 1.59 |
| - Discos and disco-pubs | 8.08 | 6.17 | 7.35 | 5.84 | 5.23 |
| Others: | 25.99 | 20.98 | 16.26 | 15.66 | 17.02 |
| - Wellness | 3.65 | 3.59 | 3.13 | 3.35 | 3.10 |
| - Medical expenses | 2.10 | 1.98 | 2.33 | 1.57 | 1.64 |
| - Other expenses | 20.24 | 15.42 | 10.81 | 10.74 | 12.28 |

How far in advance do they book their trip?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.3% | 0.6% | 0.5% | 0.7% | 0.6% |
| Between 2 and 7 days | 8.9% | 7.8% | 7.2% | 6.7% | 6.1% |
| Between 8 and 15 days | 10.8% | 9.8% | 8.7% | 9.8% | 7.4% |
| Between 16 and 30 days | 18.3% | 17.8% | 16.2% | 16.7% | 15.0% |
| Between 31 and 90 days | 33.3% | 33.3% | 34.9% | 35.5% | 36.8% |
| More than 90 days | 28.4% | 30.8% | 32.4% | 30.5% | 34.0% |

What do they book at their place of residence?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--|--------|--------|--------|--------|--------|
| Flight only | 11.9% | 12.0% | 11.5% | 10.0% | 9.9% |
| Flight and accommodation (room only) | 30.2% | 27.6% | 28.0% | 27.1% | 27.6% |
| Flight and accommodation (B&B) | 7.5% | 9.5% | 9.2% | 9.6% | 10.0% |
| Flight and accommodation (half board) | 20.7% | 18.4% | 18.0% | 20.5% | 18.9% |
| Flight and accommodation (full board) | 4.4% | 4.5% | 4.4% | 4.1% | 4.4% |
| Flight and accommodation (all inclusive) | 25.4% | 28.1% | 29.0% | 28.8% | 29.2% |
| % Tourists using low-cost airlines | 37.1% | 40.3% | 41.3% | 46.6% | 48.0% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 11.6% | 10.4% | 12.0% | 11.3% | 12.6% |
| - Sporting activities | 5.9% | 4.8% | 5.3% | 5.2% | 5.0% |
| - Excursions | 4.1% | 4.9% | 5.3% | 5.3% | 5.2% |
| - Trip to other islands | 1.7% | 3.2% | 2.7% | 2.2% | 1.8% |

How do they book?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Accommodation booking | | | | | |
| Tour Operator | 46.8% | 49.0% | 46.8% | 45.6% | 44.9% |
| - Tour Operator's website | 77.0% | 78.2% | 78.2% | 78.0% | 80.5% |
| Accommodation | 14.1% | 13.4% | 14.4% | 14.6% | 14.5% |
| - Accommodation's website | 76.9% | 80.2% | 80.8% | 81.3% | 83.0% |
| Travel agency (High street) | 18.3% | 16.9% | 16.7% | 17.1% | 16.5% |
| Online Travel Agency (OTA) | 13.6% | 12.8% | 14.8% | 16.0% | 17.6% |
| No need to book accommodation | 7.2% | 7.8% | 7.2% | 6.8% | 6.5% |

| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|------------------------------------|--------|--------|--------|--------|--------|
| Flight booking | | | | | |
| Tour Operator | 49.0% | 51.6% | 48.7% | 47.2% | 47.3% |
| - Tour Operator's website | 75.8% | 77.7% | 77.3% | 76.0% | 78.9% |
| Airline | 23.3% | 23.2% | 24.7% | 25.0% | 26.3% |
| - Airline's website | 95.0% | 96.0% | 96.6% | 96.6% | 97.8% |
| Travel agency (High street) | 17.7% | 15.8% | 16.0% | 16.2% | 15.4% |
| Online Travel Agency (OTA) | 10.0% | 9.3% | 10.7% | 11.6% | 11.0% |

Where do they stay?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--|--------|--------|--------|--------|--------|
| 5* Hotel | 6.6% | 7.0% | 6.1% | 7.0% | 6.1% |
| 4* Hotel | 35.6% | 34.5% | 35.3% | 37.2% | 37.6% |
| 1-2-3* Hotel | 15.1% | 15.7% | 15.4% | 15.4% | 14.0% |
| Apartment | 34.1% | 31.9% | 32.5% | 32.1% | 32.6% |
| Property (privately-owned, friends, family) | 5.8% | 6.6% | 6.4% | 5.2% | 5.3% |
| Others | 2.7% | 4.3% | 4.3% | 3.1% | 4.4% |

Who are they?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Gender | | | | | |
| Percentage of men | 50.5% | 50.4% | 50.6% | 49.2% | 48.5% |
| Percentage of women | 49.5% | 49.6% | 49.4% | 50.8% | 51.5% |
| Age | | | | | |
| Average age (tourists > 16 years old) | 47.3 | 48.4 | 48.8 | 49.3 | 49.9 |
| Standard deviation | 14.8 | 14.9 | 15.0 | 15.7 | 15.4 |
| Age range (> 16 years old) | | | | | |
| 16-24 years old | 6.7% | 6.2% | 5.9% | 6.2% | 5.4% |
| 25-30 years old | 9.5% | 8.8% | 8.9% | 9.0% | 8.2% |
| 31-45 years old | 29.7% | 26.8% | 25.8% | 25.9% | 25.5% |
| 46-60 years old | 31.4% | 34.4% | 34.8% | 31.0% | 32.8% |
| Over 60 years old | 22.7% | 23.8% | 24.6% | 28.0% | 28.1% |
| Occupation | | | | | |
| Business owner or self-employed | 23.1% | 24.7% | 23.4% | 23.3% | 24.1% |
| Upper/Middle management employee | 32.9% | 34.9% | 35.1% | 32.9% | 32.9% |
| Auxiliary level employee | 16.3% | 13.5% | 14.8% | 13.2% | 12.7% |
| Students | 5.3% | 4.1% | 4.0% | 4.8% | 4.1% |
| Retired | 20.2% | 20.9% | 20.9% | 23.9% | 24.3% |
| Unemployed / unpaid dom. work | 2.1% | 1.9% | 1.8% | 1.9% | 2.0% |
| Annual household income level | | | | | |
| €12,000 - €24,000 | 17.4% | 15.9% | 16.2% | 15.2% | 16.1% |
| €24,001 - €36,000 | 20.0% | 17.8% | 17.8% | 18.6% | 18.1% |
| €36,001 - €48,000 | 15.9% | 17.5% | 18.0% | 18.0% | 15.8% |
| €48,001 - €60,000 | 14.8% | 15.5% | 15.8% | 14.2% | 14.9% |
| €60,001 - €72,000 | 8.7% | 9.7% | 9.1% | 9.8% | 9.8% |
| €72,001 - €84,000 | 6.4% | 6.3% | 6.3% | 6.8% | 7.1% |
| More than €84,000 | 16.8% | 17.2% | 16.8% | 17.5% | 18.2% |

(*) 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) | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|---------------------------|-----------|-----------|-----------|-----------|-----------|
| - Lanzarote | 429,077 | 466,498 | 483,781 | 560,886 | 587,352 |
| - Fuerteventura | 366,481 | 363,967 | 394,726 | 473,171 | 465,858 |
| - Gran Canaria | 819,171 | 895,237 | 871,881 | 991,937 | 1,048,751 |
| - Tenerife | 1,059,587 | 1,150,121 | 1,179,865 | 1,261,312 | 1,325,439 |
| - La Palma | 48,806 | 36,356 | 42,548 | 61,898 | 78,022 |

| Share (%) | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote | 15.8% | 16.0% | 16.3% | 16.7% | 16.8% |
| - Fuerteventura | 13.5% | 12.5% | 13.3% | 14.1% | 13.3% |
| - Gran Canaria | 30.1% | 30.7% | 29.3% | 29.6% | 29.9% |
| - Tenerife | 38.9% | 39.5% | 39.7% | 37.7% | 37.8% |
| - La Palma | 1.8% | 1.2% | 1.4% | 1.8% | 2.2% |

Who do they come with?



| | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied | 11.1% | 10.5% | 10.2% | 10.5% | 9.7% |
| Only with partner | 53.0% | 53.2% | 54.7% | 53.4% | 49.8% |
| Only with children (under the age of 13) | 1.0% | 1.2% | 0.8% | 1.0% | 1.6% |
| Partner + children (under the age of 13) | 8.9% | 8.2% | 8.1% | 8.8% | 9.8% |
| Other relatives | 5.8% | 4.9% | 5.5% | 5.1% | 5.6% |
| Friends | 6.6% | 6.6% | 6.7% | 6.9% | 6.4% |
| Work colleagues | 0.6% | 0.3% | 0.4% | 0.3% | 0.3% |
| Other combinations ⁽¹⁾ | 13.0% | 15.0% | 13.7% | 14.1% | 16.8% |

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

How do they rate the destination?



| Impression of their stay | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 92.7% | 93.9% | 90.8% | 94.3% | 93.6% |
| Average rating (scale 1-10) | 8.77 | 8.80 | 8.62 | 8.92 | 8.86 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists | 82.3% | 82.4% | 82.4% | 82.5% | 82.7% |
| In love (at least 10 previous visits) | 20.6% | 19.2% | 20.7% | 19.1% | 19.4% |

Where are they from?



| Ten main source markets | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|-------------------------|---------|---------|---------|---------|-----------|
| United Kingdom | 690,679 | 769,727 | 815,450 | 963,328 | 1,039,959 |
| Germany | 591,643 | 657,319 | 672,698 | 736,792 | 720,709 |
| Spanish Mainland | 262,053 | 216,709 | 231,514 | 292,274 | 295,321 |
| Sweden | 212,971 | 230,953 | 227,528 | 223,664 | 227,377 |
| Norway | 189,678 | 197,583 | 166,737 | 165,346 | 170,603 |
| Netherlands | 110,281 | 114,725 | 105,210 | 131,526 | 142,610 |
| Denmark | 111,667 | 120,562 | 110,410 | 127,254 | 123,295 |
| France | 75,626 | 93,412 | 106,672 | 119,336 | 118,665 |
| Italy | 50,145 | 63,672 | 83,424 | 98,504 | 116,441 |
| Finland | 118,762 | 129,896 | 104,231 | 105,197 | 105,492 |

Why do they choose the Canary Islands?



| Aspects influencing the choice | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun | 93.1% | 92.8% | 91.2% | 92.3% | 91.6% |
| Tranquillity/rest/relaxation | 39.8% | 39.7% | 40.2% | 37.9% | 36.9% |
| Beaches | 30.0% | 29.0% | 28.0% | 29.8% | 28.6% |
| Scenery | 21.1% | 22.5% | 24.3% | 23.0% | 23.3% |
| Visiting new places | 11.9% | 12.6% | 12.4% | 12.1% | 12.4% |
| Price | 13.4% | 13.5% | 12.9% | 12.2% | 11.7% |
| Security | 6.1% | 5.8% | 6.7% | 11.1% | 11.0% |
| Ease of travel | 11.2% | 10.4% | 9.8% | 9.9% | 10.6% |
| Quality of the environment | 6.4% | 6.2% | 6.4% | 7.0% | 6.7% |
| Suitable destination for children | 6.0% | 5.6% | 5.1% | 5.5% | 6.6% |
| Active tourism | 5.6% | 6.2% | 6.3% | 6.9% | 6.5% |
| Nightlife/fun | 5.5% | 3.9% | 4.1% | 4.0% | 3.6% |
| Culture | 2.8% | 2.5% | 2.9% | 2.6% | 2.8% |
| Shopping | 2.7% | 2.7% | 3.4% | 2.4% | 2.5% |
| Nautical activities | 1.7% | 2.0% | 1.7% | 2.0% | 1.7% |
| Theme parks | 1.1% | 1.1% | 1.6% | 1.6% | 1.7% |

* Multi-choice question

What did motivate them to come?



| Aspects motivating the choice | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 | 2017Q1 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 71.4% | 70.8% | 70.5% | 69.7% | 70.8% |
| Recommendation by friends or relatives | 32.1% | 30.7% | 31.3% | 31.6% | 32.3% |
| The Canary Islands television channel | 0.2% | 0.3% | 0.3% | 0.4% | 0.4% |
| Other television or radio channels | 0.8% | 0.7% | 0.7% | 0.8% | 0.8% |
| Information in the press/magazines/books | 3.9% | 4.4% | 4.0% | 3.6% | 4.0% |
| Attendance at a tourism fair | 0.6% | 0.6% | 0.6% | 0.5% | 0.4% |
| Tour Operator's brochure or catalogue | 8.1% | 7.8% | 7.3% | 7.2% | 6.4% |
| Recommendation by Travel Agency | 7.5% | 7.0% | 7.4% | 8.0% | 7.3% |
| Information obtained via the Internet | 25.0% | 24.6% | 23.3% | 24.1% | 23.4% |
| Senior Tourism programme | 0.4% | 0.4% | 0.3% | 0.1% | 0.2% |
| Others | 6.5% | 6.8% | 6.7% | 6.7% | 6.7% |

* 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.