

Tourist profile trend (2017)

La Palma: First Quarter

How many are they and how much do they spend?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	48,806	36,356	42,548	61,898	78,022
Average daily expenditure (€)	134.10	111.42	124.97	127.44	123.06
. in their place of residence	93.44	75.22	90.13	90.00	88.02
. in the Canary Islands	40.66	36.20	34.84	37.43	35.04
Average length of stay	10.59	12.05	10.83	10.72	10.95
Turnover per tourist (€)	1,274	1,189	1,180	1,225	1,163
Total turnover (> 16 years old) (€m)	62	43	50	76	91
Share of total turnover	37.0%	27.8%	27.6%	30.5%	--
Share of total tourist	34.0%	26.2%	26.0%	27.9%	--

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

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation (**):	48.08	79.15	48.07	46.91	43.30
- Accommodation	44.50	76.72	38.80	38.46	37.22
- Additional accommodation expenses	3.58	2.42	9.27	8.45	6.08
Transport:	42.37	38.63	53.82	62.39	44.32
- Public transport	3.23	4.70	8.37	5.55	4.85
- Taxi	3.10	9.64	5.44	3.58	3.64
- Car rental	36.05	24.30	40.01	53.25	35.83
Food and drink:	264.53	217.53	173.36	195.11	189.73
- Food purchases at supermarkets	128.42	84.71	67.85	88.46	88.46
- Restaurants	136.11	132.82	105.51	106.65	101.27
Souvenirs:	31.20	40.49	34.51	32.40	33.00
Leisure:	21.08	26.71	19.90	22.05	21.83
- Organized excursions	10.42	11.30	11.09	13.20	13.90
- Leisure, amusement	3.75	0.17	1.86	1.40	0.58
- Trip to other islands	1.08	1.68	1.45	0.77	0.58
- Sporting activities	3.30	10.37	3.00	5.48	2.32
- Cultural activities	1.36	1.09	1.44	0.65	1.49
- Discos and disco-pubs	1.17	2.11	1.06	0.56	2.97
Others:	14.16	14.46	21.42	15.04	19.78
- Wellness	2.60	0.98	1.90	1.46	1.53
- Medical expenses	1.37	0.65	0.70	1.26	1.91
- Other expenses	10.20	12.83	18.82	12.32	16.35

How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.1%	0.1%	0.2%	0.6%	0.6%
Between 2 and 7 days	7.2%	6.6%	3.0%	5.9%	2.3%
Between 8 and 15 days	10.9%	8.4%	6.9%	6.4%	7.9%
Between 16 and 30 days	23.2%	24.6%	19.5%	13.7%	10.2%
Between 31 and 90 days	36.5%	33.0%	35.5%	39.8%	41.9%
More than 90 days	22.1%	27.2%	34.9%	33.5%	37.1%

What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	12.7%	19.2%	13.2%	13.4%	15.1%
Flight and accommodation (room only)	41.8%	36.6%	37.3%	37.0%	38.0%
Flight and accommodation (B&B)	6.6%	16.8%	12.6%	16.5%	13.0%
Flight and accommodation (half board)	26.2%	12.3%	25.8%	19.7%	18.6%
Flight and accommodation (full board)	3.9%	3.8%	1.7%	0.7%	2.0%
Flight and accommodation (all inclusive)	8.7%	11.3%	9.4%	12.8%	13.4%
% Tourists using low-cost airlines	18.0%	27.0%	26.8%	38.9%	50.0%
Other expenses in their place of residence:					
- Car rental	45.3%	42.8%	41.3%	42.3%	44.1%
- Sporting activities	3.9%	2.0%	5.2%	4.6%	6.9%
- Excursions	4.1%	5.8%	5.8%	9.7%	11.4%
- Trip to other islands	0.5%	3.7%	1.9%	2.0%	0.7%

How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation booking					
Tour Operator	48.2%	30.4%	41.0%	34.2%	26.7%
- Tour Operator's website	70.9%	63.0%	83.3%	66.5%	71.5%
Accommodation	11.8%	15.6%	19.2%	15.1%	12.6%
- Accommodation's website	69.8%	75.0%	84.5%	89.8%	76.0%
Travel agency (High street)	17.5%	21.4%	16.3%	20.4%	23.1%
Online Travel Agency (OTA)	19.0%	21.7%	18.4%	23.4%	30.8%
No need to book accommodation	3.5%	10.9%	5.1%	6.9%	6.7%

Flight booking

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	48.8%	32.2%	39.1%	33.4%	33.8%
- Tour Operator's website	68.9%	70.1%	76.3%	67.4%	64.0%
Airline	19.9%	25.7%	31.1%	30.8%	36.9%
- Airline's website	98.2%	99.8%	97.2%	97.8%	99.6%
Travel agency (High street)	18.4%	24.3%	18.3%	22.6%	17.5%
Online Travel Agency (OTA)	12.9%	17.9%	11.5%	13.2%	11.8%

Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
4* Hotel	34.2%	26.8%	33.3%	33.1%	29.7%
1-2-3* Hotel	7.2%	13.7%	8.9%	13.2%	12.1%
Apartment	54.1%	49.9%	50.9%	44.6%	48.2%
Property (privately-owned, friends, family)	3.3%	7.8%	4.8%	6.0%	6.7%
Others	1.1%	1.8%	2.0%	3.1%	3.3%

Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Gender					
Percentage of men	44.3%	49.0%	49.2%	38.6%	54.4%
Percentage of women	55.7%	51.0%	50.8%	61.4%	45.6%

Age

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Average age (tourists > 16 years old)	48.1	49.7	52.8	50.4	51.8
Standard deviation	13.5	14.5	13.1	13.7	14.0

Age range (> 16 years old)

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
16-24 years old	5.2%	2.4%	1.5%	3.6%	2.8%
25-30 years old	8.9%	8.0%	5.6%	7.4%	4.9%
31-45 years old	26.3%	32.7%	19.3%	24.6%	24.0%
46-60 years old	39.7%	30.3%	43.2%	37.9%	36.3%
Over 60 years old	20.0%	26.6%	30.4%	26.6%	32.1%

Occupation

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Business owner or self-employed	17.5%	23.1%	21.0%	20.7%	26.8%
Upper/Middle management employee	44.5%	32.9%	43.1%	42.6%	33.6%
Auxiliary level employee	15.2%	11.9%	6.8%	9.8%	8.8%
Students	2.1%	2.6%	1.5%	2.7%	3.0%
Retired	16.2%	26.4%	27.1%	20.7%	26.6%
Unemployed / unpaid dom. work	4.6%	3.1%	0.4%	3.6%	1.3%

Annual household income level

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
€12,000 - €24,000	12.8%	16.3%	15.5%	15.5%	15.5%
€24,001 - €36,000	24.4%	22.8%	15.6%	14.8%	23.8%
€36,001 - €48,000	15.5%	16.4%	15.1%	18.5%	12.9%
€48,001 - €60,000	11.8%	11.8%	15.8%	14.3%	18.5%
€60,001 - €72,000	8.9%	8.2%	12.0%	7.2%	7.2%
€72,001 - €84,000	7.4%	7.9%	4.9%	9.7%	8.1%
More than €84,000	19.3%	16.6%	21.2%	20.0%	14.1%

(*) 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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La Palma: First Quarter

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	8.3%	16.3%	12.6%	10.5%	10.4%
Only with partner	68.3%	62.2%	63.1%	66.7%	68.4%
Only with children (under the age of 13)	0.0%	0.6%	0.8%	1.2%	0.9%
Partner + children (under the age of 13)	3.2%	4.1%	3.9%	5.8%	3.7%
Other relatives	9.9%	1.0%	4.0%	3.8%	4.2%
Friends	3.4%	6.8%	5.3%	4.1%	4.0%
Work colleagues	1.2%	0.6%	0.4%	0.2%	0.0%
Other combinations ⁽¹⁾	5.6%	8.4%	9.9%	7.7%	8.3%

* 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)	98.0%	95.5%	94.1%	98.5%	94.4%
Average rating (scale 1-10)	8.92	9.09	8.91	9.21	8.93

How many are loyal to the destination?

Repeat tourists of the island	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	44.2%	40.8%	43.3%	44.6%	36.8%
In love (at least 10 previous visits)	2.8%	7.7%	5.3%	5.5%	4.7%

Where are they from?



Ten main source markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Germany	15,336	17,279	17,834	26,559	29,511
United Kingdom	4,208	5,694	7,607	8,816	13,407
Poland	0	0	0	0	11,614
Spanish Mainland	8,630	3,864	5,131	8,907	7,998
Netherlands	4,000	3,784	4,087	5,370	5,422
France	1,144	571	847	1,663	2,667
Austria	412	308	3,195	3,700	2,159
Belgium	1,988	1,272	1,158	3,214	1,294
Switzerland	29	478	755	528	734
Denmark	400	123	200	0	411

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	85.8%	87.1%	83.2%	85.0%	87.0%
Scenery	61.9%	61.1%	68.0%	64.4%	56.4%
Tranquillity/rest/relaxation	41.9%	37.0%	37.9%	40.2%	35.6%
Active tourism	37.4%	27.0%	39.9%	35.5%	30.1%
Visiting new places	7.3%	9.5%	16.2%	10.8%	18.8%
Quality of the environment	11.1%	10.4%	12.4%	15.3%	15.4%
Security	7.2%	1.6%	2.9%	4.1%	7.8%
Price	2.9%	5.8%	4.7%	4.8%	7.7%
Beaches	5.8%	7.5%	3.6%	7.9%	6.1%
Ease of travel	3.8%	1.6%	5.0%	4.3%	3.8%
Rural tourism	1.8%	5.8%	3.6%	3.4%	1.9%
Culture	3.6%	2.2%	1.1%	3.0%	1.6%
Nightlife/fun	0.8%	0.0%	0.6%	0.4%	1.1%
Suitable destination for children	1.4%	1.6%	1.1%	1.6%	0.8%
Nautical activities	0.7%	2.7%	1.1%	0.9%	0.6%
Golf	0.0%	0.0%	0.1%	0.0%	0.6%

* Multi-choice question

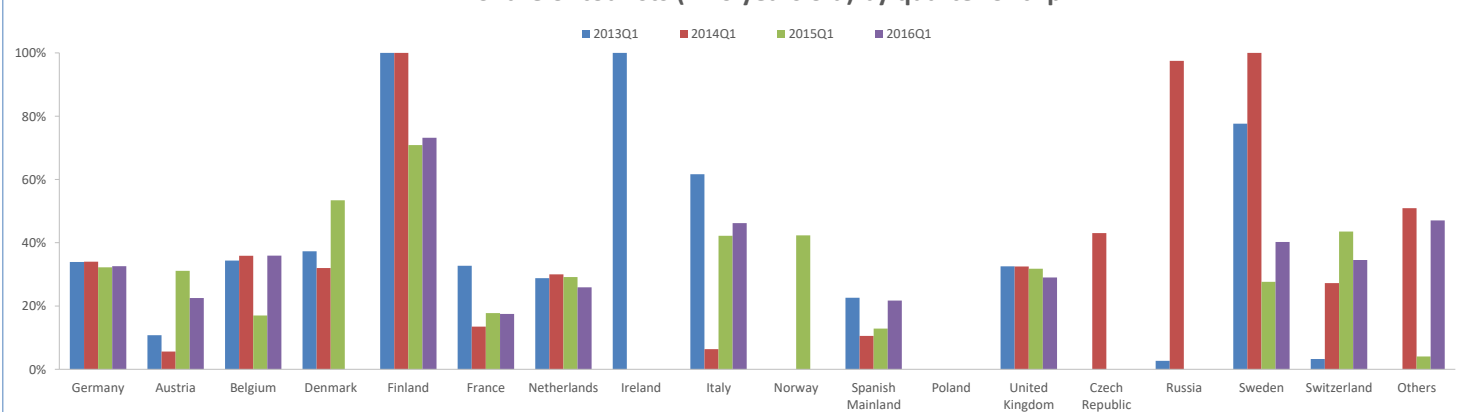
What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	71.6%	66.0%	74.5%	69.0%	70.1%
Recommendation by friends or relatives	35.3%	31.7%	27.8%	35.7%	28.7%
The Canary Islands television channel	0.0%	0.0%	0.2%	0.0%	0.3%
Other television or radio channels	0.8%	0.7%	3.6%	3.0%	2.9%
Information in the press/magazines/books	13.1%	5.0%	10.8%	6.1%	8.1%
Attendance at a tourism fair	0.2%	1.3%	0.3%	0.5%	0.5%
Tour Operator's brochure or catalogue	5.5%	6.8%	7.3%	3.9%	8.4%
Recommendation by Travel Agency	5.4%	7.8%	3.1%	6.7%	5.2%
Information obtained via the Internet	31.3%	14.2%	25.7%	18.1%	25.0%
Senior Tourism programme	0.0%	0.5%	0.0%	0.2%	0.6%
Others	4.9%	6.9%	5.1%	8.0%	5.3%

* 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.