

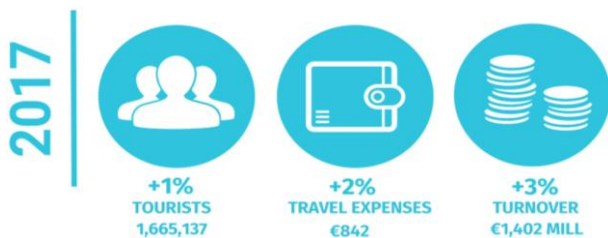
Tourist profile trend (2017)

SPANISH MAINLAND

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR) (mill.)	1.52	1.44	1.49	1.65	1.67
Tourist arrivals (> 16 years old) (mill.)	1.30	1.21	1.26	1.47	1.48
Average daily expenditure (€)	123.38	127.42	131.45	131.48	139.16
. in their place of residence	77.76	81.29	85.73	84.74	90.81
. in the Canary Islands	45.61	46.13	45.72	46.73	48.35
Average length of stay	7.43	7.49	7.41	7.48	7.17
Turnover per tourist (€)	767	795	813	828	842
Total turnover (€m)	1,170	1,143	1,212	1,366	1,402
Tourist arrivals: year on year change	--	-5.7%	3.7%	10.6%	1.0%
Turnover: year on year change	--	-2.3%	6.0%	12.7%	2.7%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	18.4%	16.8%	16.9%	18.5%	16.7%
- Additional accommodation expenses	11.0%	9.9%	11.0%	10.3%	10.8%
Transport:					
- Public transport	17.0%	16.8%	17.3%	15.9%	16.8%
- Taxi	17.4%	17.9%	15.8%	15.9%	17.3%
- Car rental	35.0%	35.4%	34.3%	34.6%	34.4%
Food and drink:					
- Food purchases at supermarkets	50.0%	48.8%	48.3%	47.5%	47.4%
- Restaurants	59.5%	59.5%	59.1%	63.2%	68.6%
Souvenirs:	62.5%	58.8%	56.3%	56.3%	57.2%
Leisure:					
- Organized excursions	20.0%	18.7%	17.5%	19.4%	18.0%
- Leisure, amusement	11.1%	11.0%	12.7%	12.4%	11.4%
- Trip to other islands	4.1%	3.9%	3.7%	3.8%	3.7%
- Sporting activities	5.0%	5.5%	4.9%	5.0%	5.3%
- Cultural activities	6.9%	7.7%	7.1%	6.6%	5.9%
- Discos and disco-pubs	11.1%	10.4%	10.6%	9.9%	11.0%
Others:					
- Wellness	4.9%	4.3%	4.8%	4.3%	3.2%
- Medical expenses	4.6%	4.4%	4.1%	4.1%	4.5%
- Other expenses	11.8%	10.1%	11.5%	10.4%	11.2%



What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	18.7%	19.8%	21.5%	19.8%	19.2%
Flight and accommodation (room only)	18.3%	19.0%	17.9%	20.1%	22.9%
Flight and accommodation (B&B)	8.6%	9.0%	9.0%	8.7%	9.3%
Flight and accommodation (half board)	21.4%	21.2%	20.8%	20.6%	19.7%
Flight and accommodation (full board)	8.1%	7.7%	7.2%	7.6%	7.9%
Flight and accommodation (all inclusive)	24.9%	23.3%	23.7%	23.1%	21.1%
<u>% Tourists using low-cost airlines</u>	56.2%	56.6%	57.2%	62.1%	61.8%
<u>Other expenses in their place of residence:</u>					
- Car rental	22.1%	23.6%	23.7%	26.0%	26.4%
- Sporting activities	2.0%	1.7%	2.1%	2.4%	2.7%
- Excursions	4.6%	5.4%	5.5%	6.3%	7.1%
- Trip to other islands	1.5%	1.6%	1.5%	2.0%	2.1%

How do they book?



	2013	2014	2015	2016	2017
<u>Accommodation booking</u>					
Tour Operator	13.7%	13.7%	12.5%	12.3%	11.9%
- Tour Operator's website	77.2%	76.8%	74.8%	78.7%	78.7%
Accommodation	21.1%	20.7%	19.8%	21.0%	21.1%
- Accommodation's website	80.2%	80.7%	82.5%	81.9%	82.9%
Travel agency (High street)	29.6%	29.8%	29.7%	28.2%	28.0%
Online Travel Agency (OTA)	22.0%	20.9%	20.6%	22.5%	24.1%
No need to book accommodation	13.6%	15.0%	17.4%	16.0%	14.9%
<u>Flight booking</u>					
Tour Operator	19.1%	18.6%	18.1%	17.5%	17.2%
- Tour Operator's website	75.6%	76.9%	75.0%	77.8%	77.2%
Airline	35.8%	36.5%	38.7%	40.0%	41.1%
- Airline's website	97.4%	97.6%	98.0%	97.9%	98.4%
Travel agency (High street)	28.9%	29.0%	28.7%	28.0%	26.7%
Online Travel Agency (OTA)	16.2%	15.8%	14.4%	14.6%	14.9%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.9%	1.0%	0.8%	0.8%	0.9%
Between 2 and 7 days	14.7%	14.0%	11.8%	10.0%	8.9%
Between 8 and 15 days	17.1%	14.3%	12.1%	11.8%	10.4%
Between 16 and 30 days	24.0%	23.5%	22.5%	20.1%	19.2%
Between 31 and 90 days	31.5%	34.2%	36.9%	37.4%	37.2%
More than 90 days	11.7%	12.9%	15.9%	20.0%	23.5%

Who are they?



	2013	2014	2015	2016	2017
<u>Gender</u>					
Men	52.5%	55.4%	53.1%	53.0%	52.4%
Women	47.5%	44.6%	46.9%	47.0%	47.6%
<u>Age</u>					
Average age (tourists > 16 years old)	38.1	39.1	39.6	41.2	41.0
Standard deviation	11.5	11.6	12.0	12.9	12.9
<u>Age range (> 16 years old)</u>					
16-24 years old	9.2%	9.0%	9.7%	7.9%	9.3%
25-30 years old	19.2%	17.5%	16.2%	14.6%	15.0%
31-45 years old	48.8%	46.9%	44.9%	44.1%	41.8%
46-60 years old	17.9%	21.4%	23.7%	24.2%	25.6%
Over 60 years old	5.0%	5.2%	5.5%	9.2%	8.4%
<u>Occupation</u>					
Business owner or self-employed	19.5%	21.8%	21.0%	20.0%	20.4%
Upper/Middle management employee	34.8%	35.4%	36.1%	36.3%	34.9%
Auxiliary level employee	27.7%	25.0%	25.9%	26.2%	26.9%
Students	7.9%	7.1%	7.5%	6.0%	7.2%
Retired	4.5%	5.0%	4.7%	7.8%	6.7%
Unemployed / unpaid dom. work	5.5%	5.7%	4.8%	3.7%	3.8%
<u>Annual household income level</u>					
€12,000 - €24,000	32.8%	31.3%	31.2%	29.1%	31.2%
€24,001 - €36,000	27.1%	27.4%	25.8%	27.1%	26.1%
€36,001 - €48,000	15.2%	15.3%	16.6%	16.6%	16.9%
€48,001 - €60,000	10.5%	11.1%	10.4%	11.4%	11.0%
€60,001 - €72,000	5.1%	5.7%	5.5%	6.2%	5.2%
€72,001 - €84,000	3.4%	3.1%	3.2%	3.2%	3.3%
More than €84,000	5.9%	6.1%	7.3%	6.4%	6.4%

Tourist profile trend (2017)

SPANISH MAINLAND

Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	231,724	206,912	191,537	218,286	195,772
- Fuerteventura	110,663	95,696	109,376	111,928	102,480
- Gran Canaria	399,994	383,540	398,534	484,482	491,254
- Tenerife	509,437	480,387	506,292	606,002	637,828
- La Palma	38,141	36,612	39,886	40,972	42,284

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	18.0%	17.2%	15.4%	14.9%	13.3%
- Fuerteventura	8.6%	8.0%	8.8%	7.7%	7.0%
- Gran Canaria	31.0%	31.9%	32.0%	33.1%	33.4%
- Tenerife	39.5%	39.9%	40.6%	41.5%	43.4%
- La Palma	3.0%	3.0%	3.2%	2.8%	2.9%

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	9.0%	9.4%	8.8%	8.6%	7.7%
4* Hotel	41.5%	39.6%	39.4%	38.0%	37.6%
1-2-3* Hotel	14.1%	15.1%	14.0%	14.2%	15.0%
Apartment	21.5%	21.0%	19.9%	22.8%	24.0%
Property (privately-owned, friends, family)	12.7%	13.5%	16.5%	14.0%	13.4%
Others	1.1%	1.5%	1.4%	2.4%	2.4%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	74.1%	71.1%	71.2%	69.7%	68.9%
Beaches	37.9%	36.6%	35.6%	36.3%	35.8%
Tranquillity/rest/relaxation	35.4%	35.1%	34.6%	32.6%	33.7%
Scenery	25.8%	27.5%	28.8%	29.2%	30.0%
Visiting new places	17.9%	19.3%	19.3%	19.3%	20.3%
Price	11.6%	10.6%	9.8%	8.7%	7.9%
Quality of the environment	6.7%	6.6%	7.5%	8.1%	7.3%
Suitable destination for children	6.5%	6.8%	7.3%	7.6%	6.5%
Theme parks	3.0%	2.9%	3.4%	4.8%	4.6%
Active tourism	3.6%	3.5%	4.4%	4.5%	4.4%
Nightlife/fun	2.9%	2.7%	2.8%	2.9%	3.1%
Security	1.7%	1.8%	2.6%	2.3%	3.0%
Culture	1.8%	2.1%	2.2%	1.8%	2.3%
Nautical activities	2.0%	2.6%	2.6%	2.5%	2.0%
Theme parks	2.4%	2.4%	2.3%	2.0%	2.0%
Shopping	2.9%	2.8%	2.2%	1.6%	1.7%

* Multi-choice question

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	19.1%	20.0%	18.2%	16.6%	17.6%
Only with partner	44.6%	42.2%	40.2%	39.8%	37.9%
Only with children (under the age of 13)	1.0%	1.1%	1.4%	1.7%	1.7%
Partner + children (under the age of 13)	12.2%	13.4%	15.1%	16.5%	14.1%
Other relatives	4.5%	3.9%	4.7%	4.3%	4.9%
Friends	6.9%	6.5%	6.5%	6.8%	7.6%
Work colleagues	1.0%	1.1%	1.1%	0.9%	1.2%
Other combinations ⁽¹⁾	10.6%	11.7%	12.7%	13.5%	14.9%

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

How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	93.4%	93.8%	93.1%	94.4%	94.2%
Average rating (scale 1-10)	8.76	8.80	8.83	8.89	8.92

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	78.2%	78.7%	78.6%	79.8%	79.4%
At least 10 previous visits	13.8%	14.6%	16.1%	16.1%	16.4%

Where does the flight come from?

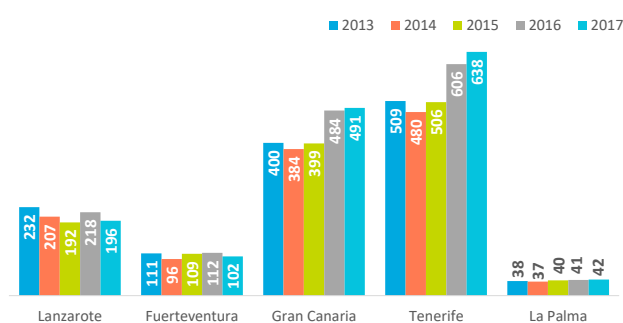
Tourists (> 16 years old)	2013	2014	2015	2016	2017
Spanish Mainland	99.4%	99.3%	99.6%	99.6%	99.6%
United Kingdom	0.0%	0.1%	0.0%	0.1%	0.1%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Germany	0.0%	0.0%	0.1%	0.0%	0.0%
Belgium	0.0%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Sweden	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.0%
Others	0.5%	0.5%	0.3%	0.3%	0.2%

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	58.0%	58.7%	59.0%	59.2%	58.8%
Recommendation by friends/relatives	38.6%	38.4%	38.9%	36.3%	37.4%
The Canary Islands television channel	0.4%	0.3%	0.3%	0.2%	0.3%
Other television or radio channels	0.9%	1.0%	1.0%	0.7%	1.1%
Information in press/magazines/books	3.8%	4.0%	3.6%	3.4%	3.4%
Attendance at a tourism fair	0.7%	0.6%	0.7%	0.3%	0.8%
Tour Operator's brochure or catalogue	2.4%	2.2%	2.3%	1.2%	1.4%
Recommendation by Travel Agency	7.6%	7.3%	7.6%	6.2%	5.8%
Information obtained via the Internet	22.6%	23.2%	22.6%	20.8%	21.2%
Senior Tourism programme	1.8%	1.3%	0.9%	1.4%	1.5%
Others	13.1%	14.3%	13.5%	13.2%	12.6%

* Multi-choice question

Tourist arrivals by islands (thousands)



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.