

Tourist profile trend (2017)

SPANISH MAINLAND: Fourth Quarter



How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	319,713	306,026	310,722	337,034	335,630
Tourist arrivals (> 16 years old)	275,386	259,204	267,982	310,568	313,171
Average daily expenditure (€)	123.90	133.68	129.23	136.77	142.50
. in their place of residence	76.30	83.72	80.25	85.65	89.97
. in the Canary Islands	47.60	49.96	48.98	51.12	52.53
Average lenght of stay	6.87	7.13	7.09	6.93	6.52
Turnover per tourist (€)	730	771	763	818	795
Total turnover (€m)	233	236	237	276	267
Share of annual tourist	21.0%	21.3%	20.8%	20.4%	20.2%
Share of annual turnover	19.9%	20.7%	19.6%	20.2%	19.0%

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	18.2%	17.0%	16.4%	19.3%	16.5%
- Additional accommodation expenses	10.0%	9.6%	10.8%	9.4%	9.5%

Transport:

- Public transport	16.6%	15.9%	15.5%	15.5%	17.1%
- Taxi	16.1%	18.4%	14.7%	16.2%	18.2%
- Car rental	33.3%	35.4%	33.9%	35.5%	30.7%

Food and drink:

- Food purchases at supermarkets	50.6%	45.1%	46.8%	48.8%	43.2%
- Restaurants	58.6%	63.2%	61.5%	65.3%	68.2%

Souvenirs:	62.7%	57.3%	57.1%	54.4%	58.6%
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Leisure:

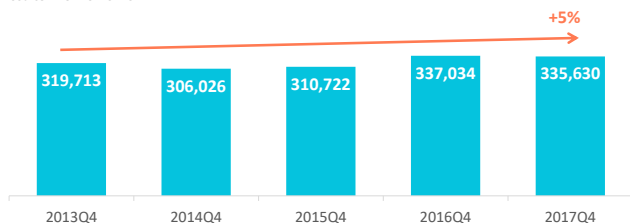
- Organized excursions	17.1%	15.8%	13.5%	17.0%	16.8%
- Leisure, amusement	12.5%	10.5%	8.8%	11.2%	8.4%
- Trip to other islands	3.6%	3.5%	3.1%	2.9%	3.0%
- Sporting activities	4.8%	5.9%	4.3%	4.5%	4.1%
- Cultural activities	6.6%	7.0%	6.7%	6.7%	6.0%
- Discos and disco-pubs	10.8%	10.0%	9.4%	9.7%	11.0%

Others:

- Wellness	5.5%	3.8%	4.3%	4.7%	3.5%
- Medical expenses	4.4%	3.9%	4.4%	4.3%	4.3%
- Other expenses	12.6%	12.3%	12.4%	10.8%	10.8%

TOURIST ARRIVALS

Source: FRONTUR ISTAT



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	19.9%	22.2%	27.1%	24.2%	21.0%
Flight and accommodation (room only)	18.2%	18.4%	17.6%	20.0%	23.5%
Flight and accommodation (B&B)	9.4%	10.6%	10.1%	9.9%	9.9%
Flight and accommodation (half board)	20.4%	19.9%	18.9%	18.8%	18.1%
Flight and accommodation (full board)	9.2%	7.7%	6.7%	8.0%	7.6%
Flight and accommodation (all inclusive)	22.9%	21.2%	19.6%	19.1%	19.9%
% Tourists using low-cost airlines	59.7%	56.7%	60.2%	69.5%	64.0%

Other expenses in their place of residence:

- Car rental	23.6%	21.7%	22.2%	26.7%	23.7%
- Sporting activities	1.4%	1.5%	1.4%	2.4%	2.7%
- Excursions	3.3%	3.7%	4.3%	6.1%	6.5%
- Trip to other islands	1.0%	1.3%	1.3%	1.4%	1.9%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	13.9%	13.2%	11.7%	12.1%	12.6%
- Tour Operator's website	76.2%	77.2%	75.1%	75.2%	74.8%
Accommodation	20.8%	21.9%	19.3%	22.7%	20.4%
- Accommodation's website	84.9%	82.6%	77.9%	81.0%	87.0%
Travel agency (High street)	27.5%	29.0%	27.1%	23.1%	28.4%
Online Travel Agency (OTA)	22.2%	19.2%	20.0%	22.9%	23.0%
No need to book accommodation	15.5%	16.7%	21.9%	19.1%	15.6%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	19.5%	19.0%	18.1%	18.5%	17.4%
- Tour Operator's website	75.7%	76.7%	74.8%	76.8%	78.2%
Airline	39.0%	38.5%	42.3%	43.8%	41.9%
- Airline's website	97.0%	96.5%	98.3%	98.4%	97.8%
Travel agency (High street)	26.9%	27.6%	26.1%	23.9%	26.1%
Online Travel Agency (OTA)	14.6%	14.8%	13.6%	13.9%	14.6%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.9%	0.6%	0.9%	0.5%	0.6%
Between 2 and 7 days	14.4%	16.5%	12.9%	10.0%	10.2%
Between 8 and 15 days	19.1%	14.5%	14.4%	13.0%	12.1%
Between 16 and 30 days	22.6%	24.8%	23.4%	21.9%	21.7%
Between 31 and 90 days	33.4%	30.8%	33.8%	36.8%	36.6%
More than 90 days	9.6%	12.9%	14.6%	17.7%	18.8%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	55.6%	56.4%	55.2%	54.2%	58.2%
Women	44.4%	43.6%	44.8%	45.8%	41.8%

Age

Average age (tourists > 16 years old)	38.9	39.7	41.1	41.4	42.1
Standard deviation	11.2	11.3	12.2	12.5	12.9

Age range (> 16 years old)

16-24 years old	5.9%	5.6%	6.6%	5.7%	7.7%
25-30 years old	18.9%	16.2%	15.5%	15.4%	13.7%
31-45 years old	49.7%	51.1%	44.7%	44.3%	40.8%
46-60 years old	20.4%	21.7%	25.5%	25.5%	27.9%
Over 60 years old	5.0%	5.4%	7.6%	9.2%	9.8%

Occupation

Business owner or self-employed	21.6%	23.0%	20.2%	22.0%	22.0%
Upper/Middle management employee	34.0%	34.3%	35.5%	36.7%	33.1%
Auxiliary level employee	27.5%	27.1%	28.2%	26.6%	28.1%
Students	5.0%	3.7%	4.9%	3.2%	5.1%
Retired	5.1%	5.4%	5.9%	8.3%	6.6%
Unemployed / unpaid dom. work	6.7%	6.5%	5.3%	3.2%	5.1%

Annual household income level

€12,000 - €24,000	33.9%	30.8%	32.6%	31.3%	32.5%
€24,001 - €36,000	27.3%	27.4%	26.0%	27.3%	23.8%
€36,001 - €48,000	15.1%	15.7%	15.3%	15.9%	16.9%
€48,001 - €60,000	11.2%	11.5%	9.9%	11.6%	12.5%
€60,001 - €72,000	4.9%	5.7%	6.7%	4.6%	4.0%
€72,001 - €84,000	2.9%	2.9%	2.4%	3.0%	3.1%
More than €84,000	4.6%	6.0%	7.1%	6.2%	7.1%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	46,619	40,156	38,340	46,378	45,725
- Fuerteventura	21,118	18,773	21,126	22,080	19,458
- Gran Canaria	91,334	82,993	85,601	96,191	103,227
- Tenerife	110,026	109,974	110,177	136,705	135,212
- La Palma	5,738	6,113	10,852	7,358	8,672

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	8.2%	8.6%	6.8%	8.4%	6.7%
4* Hotel	40.5%	38.9%	34.6%	33.7%	38.2%
1-2-3* Hotel	14.9%	16.9%	16.1%	14.4%	17.7%
Apartment	20.5%	18.6%	18.7%	23.7%	21.3%
Property (privately-owned, friends, family)	14.7%	15.4%	21.6%	17.1%	13.8%
Others	1.3%	1.5%	2.2%	2.7%	2.3%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	23.7%	23.8%	22.1%	17.5%	22.0%
Only with partner	46.6%	41.3%	40.8%	41.8%	38.4%
Only with children (under the age of 13)	0.5%	0.7%	0.9%	1.1%	1.4%
Partner + children (under the age of 13)	8.5%	12.4%	11.7%	13.1%	9.7%
Other relatives	3.8%	4.4%	5.5%	5.0%	5.5%
Friends	6.1%	5.7%	4.7%	6.5%	5.2%
Work colleagues	0.9%	1.3%	1.3%	1.3%	1.9%
Other combinations ⁽¹⁾	9.9%	10.5%	13.0%	13.7%	16.1%

* 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)	94.1%	94.7%	93.4%	93.9%	93.4%
Average rating (scale 1-10)	8.75	8.83	8.82	8.87	8.93

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	81.0%	77.8%	82.0%	83.4%	81.3%
At least 10 previous visits	15.5%	15.5%	21.5%	19.1%	19.2%

Where does the flight come from?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Spanish Mainland	99.0%	99.6%	99.8%	99.4%	99.6%
United Kingdom	0.2%	0.0%	0.1%	0.1%	0.1%
Germany	0.0%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.1%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	0.1%	0.0%	0.1%	0.0%	0.0%
Norway	0.0%	0.0%	0.1%	0.0%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%
Russia	0.0%	0.0%	0.0%	0.1%	0.0%
Others	0.5%	0.4%	0.0%	0.4%	0.2%

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	17.0%	15.6%	14.4%	15.0%	14.6%
- Fuerteventura	7.7%	7.3%	7.9%	7.2%	6.2%
- Gran Canaria	33.2%	32.2%	32.2%	31.2%	33.1%
- Tenerife	40.0%	42.6%	41.4%	44.3%	43.3%
- La Palma	2.1%	2.4%	4.1%	2.4%	2.8%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	75.6%	70.5%	73.2%	71.9%	71.3%
Tranquillity/rest/relaxation	34.3%	34.5%	34.9%	31.6%	33.2%
Beaches	34.9%	30.8%	32.8%	31.6%	30.9%
Scenery	25.1%	26.0%	26.1%	27.9%	26.5%
Visiting new places	17.9%	15.5%	14.0%	15.8%	18.0%
Quality of the environment	6.1%	7.1%	8.4%	8.0%	7.7%
Price	10.0%	10.7%	8.2%	7.8%	6.9%
Suitable destination for children	3.9%	6.9%	5.7%	5.9%	4.4%
Active tourism	3.8%	3.6%	4.8%	4.1%	4.1%
Theme parks	2.9%	2.4%	2.3%	4.3%	3.8%
Security	2.0%	2.3%	2.9%	2.9%	3.0%
Ease of travel	1.8%	2.9%	2.8%	2.2%	2.5%
Nightlife/fun	3.0%	2.3%	1.6%	2.1%	1.9%
Nautical activities	2.2%	2.5%	2.6%	2.6%	1.9%
Culture	1.6%	1.7%	1.6%	1.2%	1.8%
Shopping	2.7%	3.4%	2.5%	1.9%	1.7%

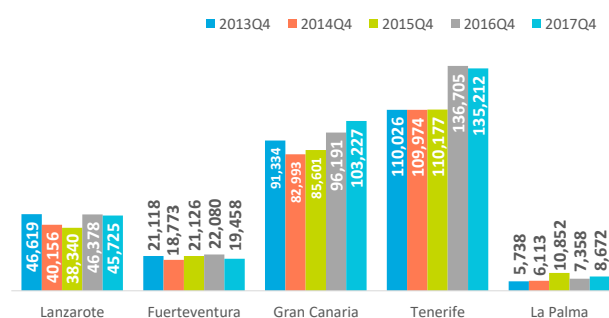
* Multi-choice question

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	60.1%	58.0%	61.2%	60.9%	60.3%
Recommendation by friends/relatives	37.3%	35.5%	36.5%	33.5%	34.3%
The Canary Islands television channel	0.4%	0.3%	0.1%	0.2%	0.3%
Other television or radio channels	0.6%	1.1%	0.6%	0.6%	1.2%
Information in press/magazines/books	4.2%	5.0%	2.6%	2.6%	3.2%
Attendance at a tourism fair	0.5%	0.8%	0.3%	0.4%	1.1%
Tour Operator's brochure or catalogue	1.5%	1.1%	1.5%	1.2%	1.1%
Recommendation by Travel Agency	5.9%	6.4%	5.4%	4.0%	5.7%
Information obtained via the Internet	19.6%	20.4%	19.0%	18.4%	18.1%
Senior Tourism programme	2.1%	1.2%	0.7%	1.4%	1.9%
Others	14.4%	17.5%	16.9%	14.5%	15.7%

* Multi-choice question

Tourist arrivals by islands



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.