Tourist profile trend (2017)

United Kingdom: Third Quarter

Canary Islands — *LATITUDE OF LIFE*

How many are they and how much do they spend?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	809,529	900,701	937,317	1,111,515	1,199,852
Average daily expenditure (€)	114.43	121.74	143.54	131.73	129.12
. in their place of residence	81.24	85.97	106.70	95.37	92.45
. in the Canary Islands	33.19	35.77	36.83	36.37	36.67
Average lenght of stay	9.70	9.50	9.58	9.41	9.09
Turnover per tourist (€)	1,025	1,079	1,270	1,146	1,086
Total turnover (> 16 years old) (€m)	830	971	1,190	1,273	1,303
Share of total turnover	28.0%	29.1%	29.7%	28.1%	--
Share of total tourist	26.4%	26.9%	26.4%	26.3%	--

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

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
**Accommodation (**):	32.20	28.77	41.85	45.96	44.69
- Accommodation	27.47	25.53	34.08	38.61	37.40
- Additional accommodation expenses	4.73	3.24	7.77	7.35	7.29
Transport:	17.43	16.05	20.79	19.37	20.77
- Public transport	3.12	2.75	4.50	4.40	5.02
- Taxi	7.54	8.87	9.89	8.69	8.03
- Car rental	6.77	4.44	6.40	6.28	7.72
Food and drink:	152.50	161.86	162.91	156.30	157.26
- Food purchases at supermarkets	67.35	74.92	76.46	67.97	69.61
- Restaurants	85.15	86.95	86.45	88.33	87.65
Souvenirs:	47.48	56.43	57.28	43.37	42.91
Leisure:	43.11	46.05	40.68	40.87	37.50
- Organized excursions	17.48	18.03	15.83	17.13	16.25
- Leisure, amusement	6.48	7.59	7.25	6.74	6.93
- Trip to other islands	1.46	0.95	0.73	1.73	1.33
- Sporting activities	4.37	5.02	3.68	4.76	4.99
- Cultural activities	1.75	1.92	1.69	2.10	1.05
- Discos and disco-pubs	11.58	12.54	11.50	8.41	6.95
Others:	12.17	11.52	13.37	13.79	10.81
- Wellness	3.14	2.62	2.81	3.11	2.13
- Medical expenses	0.81	1.12	0.82	3.21	0.96
- Other expenses	8.22	7.78	9.75	7.47	7.72

How far in advance do they book their trip?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.8%	0.4%	0.5%	0.6%	0.5%
Between 2 and 7 days	4.5%	5.6%	4.2%	4.1%	4.7%
Between 8 and 15 days	7.8%	6.6%	6.4%	6.5%	6.2%
Between 16 and 30 days	11.8%	10.0%	9.4%	11.5%	9.9%
Between 31 and 90 days	30.2%	27.1%	27.6%	27.1%	28.6%
More than 90 days	45.0%	50.3%	51.9%	50.1%	50.2%

What do they book at their place of residence?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	8.3%	8.4%	6.4%	6.0%	9.1%
Flight and accommodation (room only)	31.7%	30.7%	29.1%	31.9%	33.4%
Flight and accommodation (B&B)	4.4%	4.3%	5.0%	5.6%	6.4%
Flight and accommodation (half board)	13.5%	13.4%	13.5%	15.8%	14.5%
Flight and accommodation (full board)	2.2%	1.7%	2.3%	2.9%	1.6%
Flight and accommodation (all inclusive)	39.9%	41.5%	43.6%	37.8%	35.0%
% Tourists using low-cost airlines	62.0%	58.3%	61.8%	58.8%	64.3%
Other expenses in their place of residence:					
- Car rental	2.8%	2.8%	2.8%	2.9%	4.0%
- Sporting activities	5.0%	5.2%	4.8%	4.3%	4.0%
- Excursions	1.7%	3.1%	2.3%	2.2%	2.9%
- Trip to other islands	0.3%	0.4%	0.3%	0.4%	0.6%

How do they book?

Accommodation booking	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	55.1%	56.6%	56.4%	54.0%	51.7%
- Tour Operator´s website	81.3%	79.6%	82.7%	85.7%	84.6%
Accommodation	15.2%	13.8%	15.7%	16.7%	17.7%
- Accommodation´s website	81.4%	80.3%	81.5%	86.0%	83.2%
Travel agency (High street)	11.7%	12.0%	11.6%	11.3%	10.2%
Online Travel Agency (OTA)	12.5%	11.6%	11.9%	13.2%	13.6%
No need to book accommodation	5.6%	6.0%	4.4%	4.7%	6.8%

Flight booking	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	55.9%	59.0%	57.9%	54.2%	52.6%
- Tour Operator´s website	80.4%	78.2%	83.1%	83.5%	85.7%
Airline	27.6%	22.3%	23.2%	27.2%	28.4%
- Airline´s website	96.4%	95.7%	95.8%	97.0%	96.7%
Travel agency (High street)	9.1%	9.9%	10.2%	9.5%	9.6%
Online Travel Agency (OTA)	7.4%	8.8%	8.7%	9.1%	9.4%

Where do they stay?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	8.1%	7.6%	9.0%	9.0%	9.2%
4* Hotel	32.3%	33.5%	38.0%	39.4%	34.0%
1-2-3* Hotel	13.2%	16.1%	14.3%	10.3%	12.0%
Apartment	39.6%	35.5%	34.1%	36.9%	39.3%
Property (privately-owned,friends,family)	5.5%	5.8%	3.6%	3.0%	4.1%
Others	1.2%	1.4%	1.0%	1.5%	1.4%

Who are they?

Gender	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Percentage of men	46.5%	44.4%	46.8%	41.8%	44.1%
Percentage of women	53.5%	55.6%	53.2%	58.2%	55.9%
Age					
Average age (tourists > 16 years old)	39.5	39.4	40.7	43.4	43.3
Standard deviation	12.7	13.1	12.4	14.3	14.2
Age range (> 16 years old)					
16-24 years old	15.8%	17.8%	12.8%	11.9%	11.9%
25-30 years old	13.6%	12.5%	11.4%	10.1%	9.9%
31-45 years old	35.4%	35.8%	40.1%	33.5%	33.0%
46-60 years old	30.6%	28.6%	30.5%	31.3%	33.1%
Over 60 years old	4.7%	5.2%	5.2%	13.2%	12.0%
Occupation					
Business owner or self-employed	33.5%	32.7%	35.6%	33.7%	34.5%
Upper/Middle management employee	29.8%	30.5%	30.0%	28.9%	29.8%
Auxiliary level employee	21.6%	22.7%	21.4%	17.4%	17.3%
Students	8.1%	7.2%	5.5%	5.2%	5.7%
Retired	4.4%	4.6%	5.0%	12.8%	10.9%
Unemployed / unpaid dom. work	2.6%	2.3%	2.5%	2.0%	1.8%
Annual household income level					
€12,000 - €24,000	15.8%	17.2%	14.7%	16.6%	16.1%
€24,001 - €36,000	20.9%	22.0%	16.6%	19.9%	20.0%
€36,001 - €48,000	17.8%	17.1%	16.9%	16.3%	16.0%
€48,001 - €60,000	17.9%	14.7%	15.4%	15.8%	16.4%
€60,001 - €72,000	9.5%	8.9%	11.0%	9.5%	10.0%
€72,001 - €84,000	6.0%	5.5%	6.9%	5.8%	6.0%
More than €84,000	12.1%	14.8%	18.4%	16.0%	15.4%

(*) 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.

Which island do they choose?

Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	222,476	234,088	269,333	297,765	325,356
- Fuerteventura	80,026	102,458	106,816	110,909	119,089
- Gran Canaria	130,777	141,559	151,003	198,264	225,128
- Tenerife	370,134	416,933	401,703	493,770	521,209
- La Palma	2,169	2,323	4,946	3,450	6,196

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	27.6%	26.1%	28.8%	27.0%	27.2%
- Fuerteventura	9.9%	11.4%	11.4%	10.0%	9.9%
- Gran Canaria	16.2%	15.8%	16.2%	18.0%	18.8%
- Tenerife	45.9%	46.5%	43.0%	44.7%	43.5%
- La Palma	0.3%	0.3%	0.5%	0.3%	0.5%

Who do they come with?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	4.6%	4.3%	4.0%	4.1%	5.4%
Only with partner	38.4%	36.7%	33.8%	36.2%	30.7%
Only with children (under the age of 13)	2.0%	1.8%	2.5%	3.0%	3.2%
Partner + children (under the age of 13)	18.1%	17.9%	21.5%	19.3%	21.2%
Other relatives	7.3%	8.3%	8.9%	7.7%	8.1%
Friends	5.9%	6.0%	4.1%	5.2%	4.7%
Work colleagues	0.3%	0.1%	0.0%	0.0%	0.0%
Other combinations [1]	23.3%	25.0%	25.2%	24.5%	26.7%

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

How do they rate the destination?

Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	93.6%	94.6%	94.7%	95.2%	93.6%
Average rating (scale 1-10)	8.96	9.02	9.10	9.15	9.03

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	79.3%	78.9%	80.3%	80.5%	78.6%
In love (at least 10 previous visits)	13.9%	13.6%	14.0%	12.8%	14.1%

Where does the flight come from?

Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
United Kingdom	97.3%	98.5%	97.7%	97.2%	97.8%
Spanish Mainland	1.4%	0.5%	0.8%	1.4%	1.1%
Ireland	0.9%	0.9%	1.1%	1.3%	0.6%
Norway	0.0%	0.0%	0.2%	0.1%	0.4%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
Sweden	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.1%	0.0%	0.0%	0.0%
Germany	0.2%	0.0%	0.0%	0.0%	0.0%
Belgium	0.1%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	91.6%	91.0%	90.6%	92.2%	89.9%
Beaches	29.9%	29.8%	30.3%	31.0%	31.6%
Tranquillity/rest/relaxation	34.4%	30.3%	30.6%	30.5%	29.7%
Price	21.1%	24.3%	21.8%	18.3%	18.5%
Visiting new places	15.6%	17.1%	14.5%	15.4%	16.4%
Suitable destination for children	14.7%	16.6%	17.5%	17.0%	16.2%
Scenery	13.0%	13.3%	14.2%	13.9%	14.9%
Ease of travel	11.4%	11.4%	11.3%	14.9%	13.4%
Quality of the environment	7.7%	8.5%	8.5%	7.7%	8.7%
Theme parks	5.9%	7.5%	6.9%	6.3%	7.4%
Nightlife/fun	9.5%	8.8%	8.1%	6.0%	6.9%
Security	2.9%	3.2%	7.7%	9.3%	6.4%
Culture	3.8%	2.9%	3.9%	3.8%	3.4%
Shopping	2.0%	3.1%	3.2%	1.9%	3.0%
Active tourism	1.9%	1.7%	2.0%	1.9%	2.0%
Nautical activities	0.9%	1.0%	0.9%	1.3%	1.1%

* Multi-choise question

What did motivate them to come?

Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	64.2%	63.7%	65.4%	65.9%	65.2%
Recommendation by friends or relatives	38.8%	41.1%	39.1%	38.5%	38.9%
The Canary Islands television channel	0.3%	0.5%	0.2%	0.2%	0.3%
Other television or radio channels	0.2%	0.2%	0.3%	0.4%	0.5%
Information in the press/magazines/books	2.8%	2.3%	2.2%	2.9%	2.3%
Attendance at a tourism fair	0.3%	0.4%	0.2%	0.4%	0.4%
Tour Operator's brochure or catalogue	12.4%	13.1%	12.5%	10.4%	9.5%
Recommendation by Travel Agency	6.4%	7.3%	6.8%	6.1%	7.0%
Information obtained via the Internet	27.5%	27.7%	27.5%	27.4%	26.0%
Senior Tourism programme	0.1%	0.0%	0.0%	0.1%	0.1%
Others	6.0%	4.8%	4.7%	4.8%	5.1%

* Multi-choise question

Tourist arrivals trend (> 16 years old) (Third Quarter)
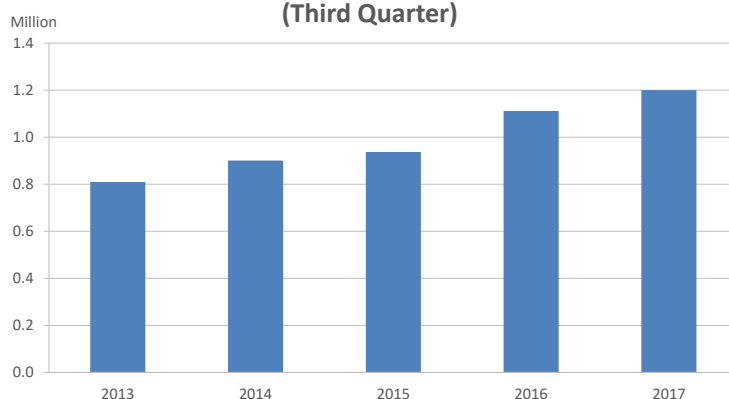
Share of tourists (> 16 years old) (Third Quarter)
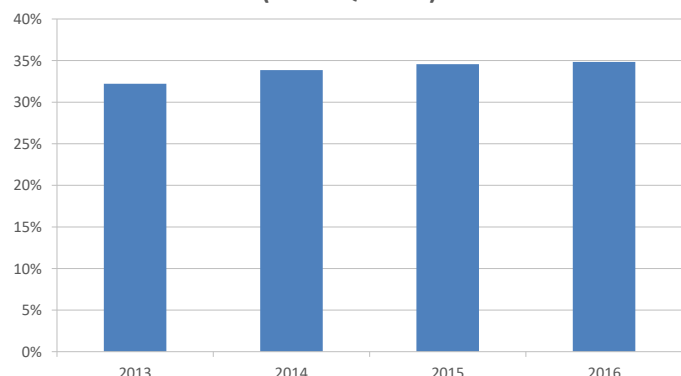
Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable " and " No answer " have been excluded.