

# Tourist profile trend (2017) SUECIA: Fourth Quarter

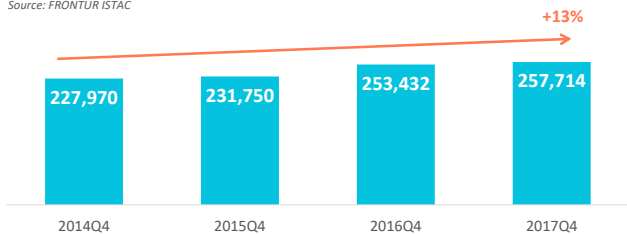
## How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	--	227,970	231,750	253,432	257,714
Tourist arrivals (> 16 years old)	--	193,921	200,240	214,101	207,946
Average daily expenditure (€)	--	135.59	143.36	145.32	157.64
. in their place of residence	--	102.53	106.81	109.39	122.03
. in the Canary Islands	--	33.06	36.55	35.93	35.61
Average length of stay	--	8.47	9.09	8.77	8.41
Turnover per tourist (€)	--	1,066	1,201	1,185	1,258
Total turnover (€m)	--	243	278	300	324
Share of annual tourist	--	39.1%	40.1%	41.8%	39.5%
Share of annual turnover	--	37.4%	40.3%	39.5%	39.3%
<b>% tourists who pay in the Canary Islands:</b>					
<b>Accommodation:</b>					
- Accommodation	--	7.5%	7.6%	10.0%	8.0%
- Additional accommodation expenses	--	3.1%	2.2%	2.3%	2.3%
<b>Transport:</b>					
- Public transport	--	14.2%	15.8%	20.0%	14.1%
- Taxi	--	18.6%	20.9%	24.2%	18.5%
- Car rental	--	8.3%	8.3%	12.3%	10.0%
<b>Food and drink:</b>					
- Food purchases at supermarkets	--	57.1%	59.2%	67.3%	61.2%
- Restaurants	--	55.6%	58.3%	58.6%	63.3%
<b>Souvenirs:</b>	--	50.0%	42.9%	45.0%	42.2%
<b>Leisure:</b>					
- Organized excursions	--	11.9%	9.0%	13.0%	11.5%
- Leisure, amusement	--	7.4%	5.1%	4.6%	5.2%
- Trip to other islands	--	0.4%	0.9%	1.7%	0.8%
- Sporting activities	--	5.3%	4.1%	6.5%	6.4%
- Cultural activities	--	2.2%	1.8%	3.6%	3.1%
- Discos and disco-pubs	--	4.0%	2.0%	1.9%	3.2%
<b>Others:</b>					
- Wellness	--	5.3%	5.6%	4.9%	3.5%
- Medical expenses	--	3.4%	1.9%	4.8%	3.2%
- Other expenses	--	8.1%	9.5%	9.8%	8.6%

### TOURIST ARRIVALS

Source: FRONTUR ISTAT



## What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	--	5.1%	4.2%	5.8%	5.0%
Flight and accommodation (room only)	--	30.2%	28.5%	33.9%	32.7%
Flight and accommodation (B&B)	--	15.4%	20.2%	17.2%	14.7%
Flight and accommodation (half board)	--	11.0%	12.8%	14.1%	13.2%
Flight and accommodation (full board)	--	3.6%	3.2%	2.1%	2.7%
Flight and accommodation (all inclusive)	--	34.8%	31.2%	26.8%	31.7%
<b>% Tourists using low-cost airlines</b>	--	19.1%	12.4%	19.9%	27.5%
<b>Other expenses in their place of residence:</b>					
- Car rental	--	5.6%	4.5%	7.1%	5.5%
- Sporting activities	--	2.7%	2.2%	2.9%	2.5%
- Excursions	--	2.3%	1.2%	1.1%	2.8%
- Trip to other islands	--	0.4%	0.2%	0.0%	0.1%

## How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
<b>Accommodation booking</b>					
<b>Tour Operator</b>	--	74.3%	83.2%	69.9%	64.5%
- Tour Operator's website	--	87.0%	84.1%	83.7%	91.2%
<b>Accommodation</b>	--	9.1%	3.9%	13.4%	12.1%
- Accommodation's website	--	86.4%	88.3%	75.0%	86.8%
<b>Travel agency (High street)</b>	--	7.7%	5.8%	3.9%	5.8%
<b>Online Travel Agency (OTA)</b>	--	7.1%	4.7%	8.4%	14.2%
<b>No need to book accommodation</b>	--	1.7%	2.3%	4.4%	3.3%
<b>Flight booking</b>					
<b>Tour Operator</b>	--	74.0%	84.3%	77.1%	69.3%
- Tour Operator's website	--	85.2%	84.0%	78.3%	90.3%
<b>Airline</b>	--	13.5%	5.7%	13.7%	16.6%
- Airline's website	--	96.3%	85.7%	92.4%	99.2%
<b>Travel agency (High street)</b>	--	7.6%	5.9%	3.6%	5.6%
<b>Online Travel Agency (OTA)</b>	--	4.9%	4.1%	5.6%	8.5%

## How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	--	0.0%	0.3%	0.0%	0.3%
Between 2 and 7 days	--	7.8%	6.9%	8.9%	5.5%
Between 8 and 15 days	--	8.5%	4.6%	6.0%	6.2%
Between 16 and 30 days	--	12.0%	11.9%	12.1%	12.3%
Between 31 and 90 days	--	31.0%	39.5%	37.4%	41.1%
More than 90 days	--	40.7%	36.8%	35.6%	34.6%

## Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
<b>Gender</b>					
Men	--	46.3%	46.4%	49.6%	45.0%
Women	--	53.7%	53.6%	50.4%	55.0%
<b>Age</b>					
Average age (tourists > 16 years old)	--	49.0	52.0	52.6	52.2
Standard deviation	--	14.3	15.4	15.1	14.4
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	--	6.1%	5.7%	4.7%	4.3%
25-30 years old	--	5.6%	4.6%	5.0%	4.4%
31-45 years old	--	29.4%	24.7%	24.0%	25.2%
46-60 years old	--	33.8%	30.2%	28.0%	34.9%
Over 60 years old	--	25.2%	34.8%	38.2%	31.3%
<b>Occupation</b>					
Business owner or self-employed	--	12.0%	9.4%	15.2%	15.4%
Upper/Middle management employee	--	44.0%	35.7%	34.1%	36.6%
Auxiliary level employee	--	19.0%	23.5%	17.3%	18.8%
Students	--	3.5%	3.2%	4.3%	2.2%
Retired	--	20.2%	27.2%	28.9%	26.3%
Unemployed / unpaid dom. work	--	1.3%	1.0%	0.3%	0.7%
<b>Annual household income level</b>					
€12,000 - €24,000	--	8.6%	10.0%	10.2%	8.0%
€24,001 - €36,000	--	15.3%	19.0%	16.1%	15.6%
€36,001 - €48,000	--	18.5%	17.5%	20.7%	16.1%
€48,001 - €60,000	--	14.6%	16.7%	19.1%	18.0%
€60,001 - €72,000	--	13.2%	13.3%	12.8%	13.8%
€72,001 - €84,000	--	11.2%	10.3%	5.2%	8.8%
More than €84,000	--	18.6%	13.3%	16.0%	19.7%

# Tourist profile trend (2017)

## SUECIA: Fourth Quarter

### Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	11,765	9,742	12,640	8,431
- Fuerteventura	--	15,383	16,495	14,417	15,162
- Gran Canaria	--	112,178	122,024	146,729	127,103
- Tenerife	--	54,179	51,511	40,068	52,857
- La Palma	--	0	133	246	2,716

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	--	6.1%	4.9%	5.9%	4.1%
- Fuerteventura	--	7.9%	8.3%	6.7%	7.4%
- Gran Canaria	--	58.0%	61.0%	68.5%	61.6%
- Tenerife	--	28.0%	25.8%	18.7%	25.6%
- La Palma	--	0.0%	0.1%	0.1%	1.3%

### Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	--	3.9%	6.6%	3.0%	5.2%
4* Hotel	--	35.8%	32.7%	30.8%	30.2%
1-2-3* Hotel	--	19.3%	20.8%	12.4%	20.1%
Apartment	--	38.7%	36.6%	49.6%	40.1%
Property (privately-owned, friends, family)	--	1.6%	1.7%	2.8%	1.8%
Others	--	0.7%	1.6%	1.5%	2.7%

### Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	--	95.1%	96.0%	95.7%	95.2%
Tranquillity/rest/relaxation	--	50.5%	58.4%	51.5%	54.1%
Beaches	--	44.3%	37.8%	42.0%	45.3%
Price	--	14.0%	11.6%	10.1%	11.7%
Scenery	--	9.1%	6.7%	8.2%	9.9%
Security	--	4.6%	8.7%	13.0%	9.8%
Suitable destination for children	--	17.7%	11.4%	7.9%	9.5%
Visiting new places	--	8.9%	9.6%	7.4%	8.4%
Ease of travel	--	4.6%	4.3%	7.4%	6.2%
Quality of the environment	--	3.7%	5.0%	3.2%	4.7%
Active tourism	--	3.0%	4.3%	2.8%	4.7%
Shopping	--	3.9%	3.6%	3.4%	1.9%
Nightlife/fun	--	2.7%	2.4%	3.5%	1.8%
Nautical activities	--	0.4%	1.3%	0.9%	1.6%
Culture	--	1.8%	1.1%	1.4%	1.4%
Golf	--	1.8%	2.3%	2.1%	1.2%

### Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	--	4.5%	5.7%	6.6%	3.9%
Only with partner	--	38.7%	50.0%	38.8%	35.7%
Only with children (under the age of 13)	--	2.3%	0.6%	1.8%	2.5%
Partner + children (under the age of 13)	--	17.7%	11.3%	13.3%	13.3%
Other relatives	--	6.1%	8.4%	9.1%	8.3%
Friends	--	4.6%	4.7%	4.0%	5.0%
Work colleagues	--	0.3%	0.6%	0.3%	0.2%
Other combinations <sup>(1)</sup>	--	25.8%	18.9%	26.2%	31.2%

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

\* Multi-choice question

### How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	--	91.5%	93.7%	92.2%	93.9%
Average rating (scale 1-10)	--	8.76	8.95	8.76	8.96

### How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	--	85.0%	85.0%	80.8%	85.7%
At least 10 previous visits	--	16.5%	17.3%	19.0%	18.7%

### Where does the flight come from?

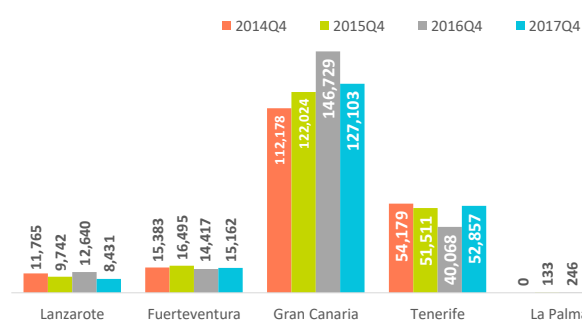
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Sweden	--	86.1%	92.5%	82.0%	82.8%
Denmark	--	10.6%	4.9%	6.7%	9.6%
Norway	--	3.1%	0.9%	5.8%	3.4%
United Kingdom	--	0.0%	0.4%	1.1%	1.4%
Spanish Mainland	--	0.1%	0.5%	2.4%	1.1%
Finland	--	0.1%	0.0%	0.0%	1.1%
Netherlands	--	0.0%	0.2%	0.0%	0.2%
Italy	--	0.0%	0.0%	0.3%	0.1%
Germany	--	0.0%	0.1%	0.9%	0.1%
Others	--	0.0%	0.5%	0.9%	0.0%

### What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	--	75.4%	77.5%	70.2%	76.0%
Recommendation by friends/relatives	--	29.1%	28.7%	30.5%	33.2%
The Canary Islands television channel	--	0.5%	0.0%	0.0%	0.2%
Other television or radio channels	--	0.1%	0.2%	0.2%	0.2%
Information in press/magazines/books	--	3.6%	3.5%	3.6%	4.6%
Attendance at a tourism fair	--	0.3%	0.2%	0.2%	0.2%
Tour Operator's brochure or catalogue	--	9.6%	11.8%	8.5%	7.4%
Recommendation by Travel Agency	--	6.2%	7.4%	7.9%	3.7%
Information obtained via the Internet	--	28.9%	24.7%	30.0%	30.4%
Senior Tourism programme	--	0.1%	0.0%	0.0%	0.7%
Others	--	5.0%	3.7%	3.4%	5.4%

\* 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. The information of 2013 is not shown due to sample failure.

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