

Tourist profile trend (2017)

Canary Islands: Second Quarter



How many are they and how much do they spend?



How do they book?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	2,196,684	2,445,421	2,468,665	3,002,026	3,199,535
Average daily expenditure (€)	120.15	124.96	131.12	128.17	133.19
.in their place of residence	82.96	87.65	93.05	90.47	93.31
.in the Canary Islands	37.19	37.31	38.07	37.70	39.87
Average lenght of stay	9.39	9.02	8.88	8.88	8.68
Turnover per tourist (€)	992	1,013	1,041	1,019	1,044
Total turnover (> 16 years old) (€m)	2,180	2,476	2,570	3,060	3,341
Share of total turnover	19.4%	20.8%	19.8%	20.5%	--
Share of total tourist	21.1%	22.4%	21.8%	22.9%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	43.95	40.36	42.33	41.18	48.89
- Accommodation	38.07	34.72	35.85	35.07	42.26
- Additional accommodation expenses	5.89	5.65	6.48	6.11	6.63
Transport:	26.01	24.61	25.74	22.58	24.07
- Public transport	5.91	4.68	4.85	3.95	3.99
- Taxi	6.84	6.50	7.10	6.13	6.46
- Car rental	13.25	13.42	13.79	12.51	13.62
Food and drink:	143.65	137.06	141.03	134.77	145.18
- Food purchases at supermarkets	65.71	61.34	63.11	58.29	57.97
- Restaurants	77.93	75.72	77.92	76.49	87.20
Souvenirs:	55.51	56.75	53.01	54.72	48.27
Leisure:	34.68	34.04	36.58	32.23	31.89
- Organized excursions	15.21	13.93	13.90	14.35	14.79
- Leisure, amusement	4.62	4.20	5.10	4.21	4.33
- Trip to other islands	2.62	1.74	3.28	1.88	1.05
- Sporting activities	3.82	5.31	6.13	4.47	4.64
- Cultural activities	1.87	2.23	1.95	1.84	1.80
- Discos and disco-pubs	6.54	6.63	6.22	5.49	5.28
Others:	15.50	15.43	17.45	12.59	15.37
- Wellness	3.53	3.90	2.95	2.85	2.73
- Medical expenses	1.81	1.55	3.91	1.68	1.31
- Other expenses	10.16	9.98	10.59	8.06	11.32

How far in advance do they book their trip?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.7%	0.6%	0.7%	0.6%	0.6%
Between 2 and 7 days	9.2%	8.5%	7.7%	6.7%	6.4%
Between 8 and 15 days	11.4%	9.4%	8.4%	7.4%	7.1%
Between 16 and 30 days	18.4%	16.5%	14.9%	14.8%	13.3%
Between 31 and 90 days	32.7%	34.0%	36.6%	36.5%	37.0%
More than 90 days	27.5%	31.0%	31.7%	34.1%	35.4%

What do they book at their place of residence?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	12.7%	9.5%	9.5%	8.2%	8.6%
Flight and accommodation (room only)	24.4%	24.2%	24.0%	24.2%	26.4%
Flight and accommodation (B&B)	7.2%	6.9%	7.7%	7.1%	7.9%
Flight and accommodation (half board)	21.3%	21.2%	19.7%	20.9%	20.8%
Flight and accommodation (full board)	4.3%	4.6%	4.2%	4.5%	4.7%
Flight and accommodation (all inclusive)	30.1%	33.7%	34.8%	35.1%	31.7%
% Tourists using low-cost airlines	45.9%	44.8%	49.6%	51.9%	52.8%
Other expenses in their place of residence:					
- Car rental	11.1%	10.7%	11.9%	12.3%	12.7%
- Sporting activities	5.0%	5.2%	5.9%	5.2%	4.9%
- Excursions	4.9%	5.3%	5.6%	5.7%	6.4%
- Trip to other islands	1.1%	1.4%	1.6%	1.7%	1.3%

(*) 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.

How do they book?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation booking					
Tour Operator	38.6%	43.4%	41.3%	41.6%	41.8%
- Tour Operator's website	74.9%	75.2%	79.4%	78.0%	81.7%
Accommodation	16.5%	14.3%	15.2%	14.8%	15.3%
- Accommodation's website	79.6%	82.3%	81.8%	84.5%	85.2%
Travel agency (High street)	21.3%	21.4%	20.5%	21.4%	19.5%
Online Travel Agency (OTA)	15.5%	14.6%	16.7%	17.2%	17.7%
No need to book accommodation	8.2%	6.3%	6.3%	5.1%	5.7%

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight booking					
Tour Operator	41.2%	44.6%	44.4%	43.8%	44.4%
- Tour Operator's website	71.9%	73.6%	77.3%	76.0%	78.6%
Airline	26.7%	24.2%	26.0%	24.0%	25.9%
- Airline's website	96.2%	97.0%	96.0%	96.3%	97.2%
Travel agency (High street)	20.3%	20.3%	18.8%	19.9%	17.9%
Online Travel Agency (OTA)	11.8%	10.9%	10.9%	12.3%	11.8%

Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	8.5%	7.3%	8.0%	7.7%	7.4%
4* Hotel	38.6%	40.2%	40.0%	41.6%	40.6%
1-2-3* Hotel	14.4%	15.8%	15.5%	15.4%	13.8%
Apartment	29.5%	28.5%	28.9%	29.1%	31.2%
Property (privately-owned, friends, family)	6.9%	5.7%	5.2%	3.8%	4.4%
Others	2.1%	2.4%	2.4%	2.5%	2.6%

Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Gender					
Percentage of men	48.3%	49.0%	47.6%	47.5%	47.0%
Percentage of women	51.7%	51.0%	52.4%	52.5%	53.0%
Age					
Average age (tourists > 16 years old)	43.4	44.5	44.0	46.7	46.6
Standard deviation	14.5	14.5	14.8	15.5	15.6
Age range (> 16 years old)					
16-24 years old	9.3%	8.2%	10.0%	7.1%	8.2%
25-30 years old	14.0%	13.4%	13.3%	12.6%	11.5%
31-45 years old	33.9%	31.5%	30.5%	27.6%	27.5%
46-60 years old	28.1%	30.9%	30.9%	31.0%	30.8%
Over 60 years old	14.7%	15.9%	15.4%	21.7%	21.9%
Occupation					
Business owner or self-employed	22.6%	23.1%	23.9%	22.0%	23.4%
Upper/Middle management employee	37.4%	38.4%	37.6%	35.2%	35.6%
Auxiliary level employee	18.2%	16.8%	16.1%	16.0%	15.5%
Students	5.9%	4.4%	6.0%	4.1%	4.1%
Retired	13.1%	14.3%	13.6%	20.2%	19.1%
Unemployed / unpaid dom. work	2.8%	3.0%	2.8%	2.5%	2.3%
Annual household income level					
€12,000 - €24,000	20.7%	18.8%	18.5%	19.3%	18.2%
€24,001 - €36,000	20.5%	20.5%	18.9%	20.5%	20.2%
€36,001 - €48,000	16.1%	17.1%	16.7%	17.1%	16.7%
€48,001 - €60,000	14.4%	14.7%	14.5%	14.9%	15.3%
€60,001 - €72,000	8.7%	9.3%	8.8%	9.1%	8.7%
€72,001 - €84,000	5.6%	5.9%	6.9%	5.5%	6.3%
More than €84,000	13.9%	13.7%	15.7%	13.6%	14.6%

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Which island do they choose?

Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	417,411	469,065	478,832	562,021	596,941
- Fuerteventura	328,775	391,383	388,881	461,607	465,702
- Gran Canaria	530,449	586,170	605,205	750,985	833,264
- Tenerife	880,137	952,834	938,517	1,159,088	1,223,753
- La Palma	25,365	29,530	36,959	46,894	55,390

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	19.1%	19.3%	19.6%	18.9%	18.8%
- Fuerteventura	15.1%	16.1%	15.9%	15.5%	14.7%
- Gran Canaria	24.3%	24.1%	24.7%	25.2%	26.2%
- Tenerife	40.3%	39.2%	38.3%	38.9%	38.5%
- La Palma	1.2%	1.2%	1.5%	1.6%	1.7%

Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	11.8%	10.8%	9.1%	10.0%	8.6%
Only with partner	47.9%	49.7%	50.2%	52.6%	52.4%
Only with children (under the age of 13)	1.3%	1.2%	1.3%	1.1%	1.2%
Partner + children (under the age of 13)	11.7%	10.7%	11.1%	9.1%	10.1%
Other relatives	6.1%	5.9%	6.1%	5.4%	5.5%
Friends	6.7%	6.5%	6.7%	7.0%	6.7%
Work colleagues	0.5%	0.5%	0.5%	0.4%	0.4%
Other combinations ⁽¹⁾	14.1%	14.8%	15.1%	14.4%	14.9%

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

How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	92.8%	94.1%	94.6%	94.9%	94.8%
Average rating (scale 1-10)	8.76	8.90	8.92	8.97	8.99

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	76.8%	76.0%	75.1%	76.3%	76.9%
In love (at least 10 previous visits)	16.8%	15.6%	16.4%	16.4%	17.3%

Where are they from?



Ten main source markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
United Kingdom	763,008	858,319	859,956	1,065,205	1,163,234
Germany	433,937	503,938	499,429	630,853	645,674
Spanish Mainland	315,948	308,348	309,983	372,102	386,734
France	78,580	106,016	127,217	144,095	135,704
Netherlands	83,148	80,854	89,526	124,827	126,792
Italy	43,034	60,575	79,260	99,475	120,259
Ireland	93,729	100,925	105,775	107,983	114,929
Belgium	55,668	61,345	72,479	83,624	83,131
Switzerland	42,262	46,571	53,038	56,494	63,159
Poland	10,119	34,779	28,470	23,110	57,604

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	89.7%	89.4%	89.1%	88.5%	88.7%
Tranquillity/rest/relaxation	39.3%	39.9%	38.1%	36.1%	37.3%
Beaches	33.6%	33.5%	32.9%	33.7%	35.2%
Scenery	20.7%	21.3%	21.7%	22.5%	23.3%
Visiting new places	13.8%	15.4%	15.1%	14.8%	15.1%
Price	15.9%	15.8%	15.8%	14.1%	14.3%
Security	4.3%	5.0%	6.0%	11.4%	9.6%
Ease of travel	9.7%	8.6%	9.7%	8.9%	9.2%
Quality of the environment	6.5%	6.3%	7.1%	7.0%	7.0%
Suitable destination for children	7.7%	7.5%	7.7%	6.1%	6.5%
Active tourism	4.1%	4.6%	5.3%	4.9%	4.9%
Nightlife/fun	5.0%	4.2%	4.2%	3.8%	4.2%
Theme parks	2.9%	2.5%	3.4%	3.2%	3.4%
Culture	3.0%	2.4%	2.6%	2.8%	2.6%
Shopping	3.3%	3.0%	2.6%	2.6%	2.5%
Nautical activities	2.0%	2.2%	2.0%	2.1%	2.1%

* Multi-choice question

What did motivate them to come?

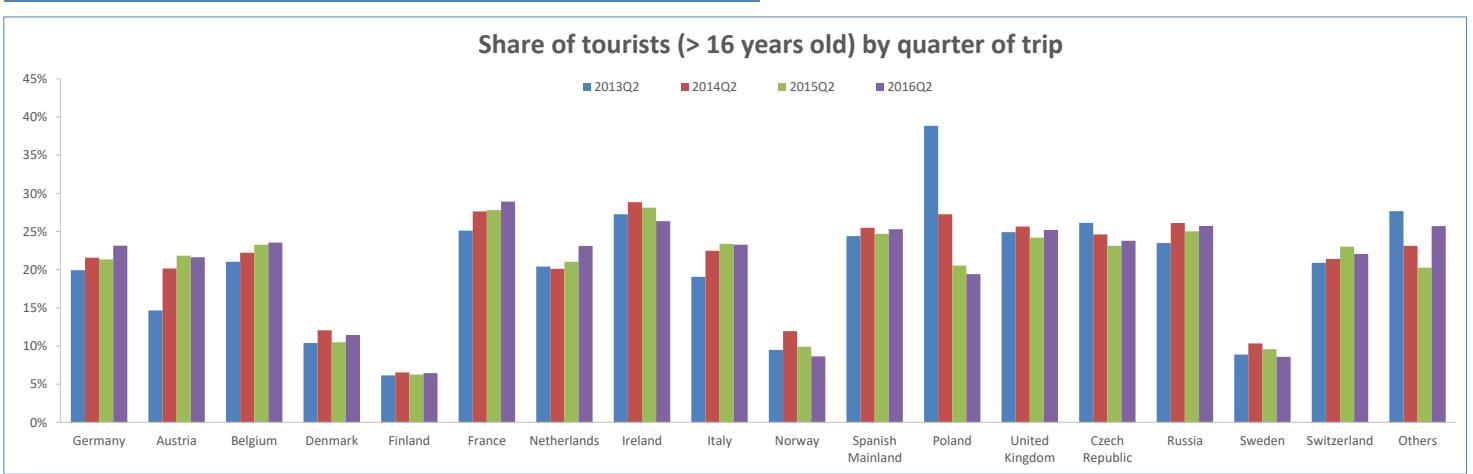


Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	63.7%	62.7%	62.0%	63.1%	64.3%
Recommendation by friends or relatives	35.9%	35.0%	35.3%	35.4%	35.4%
The Canary Islands television channel	0.4%	0.3%	0.5%	0.3%	0.4%
Other television or radio channels	0.5%	0.8%	0.6%	1.0%	1.1%
Information in the press/magazines/books	4.1%	3.7%	3.9%	3.8%	3.9%
Attendance at a tourism fair	0.6%	0.4%	0.5%	0.6%	0.5%
Tour Operator's brochure or catalogue	8.7%	9.7%	8.2%	8.3%	7.6%
Recommendation by Travel Agency	9.9%	9.9%	9.9%	9.4%	8.9%
Information obtained via the Internet	26.8%	25.9%	26.5%	25.2%	25.7%
Senior Tourism programme	0.5%	0.4%	0.3%	0.5%	0.4%
Others	7.7%	6.9%	6.7%	6.3%	5.7%

* Multi-choice question

Share of tourists (> 16 years old) by quarter of trip

■ 2013Q2 ■ 2014Q2 ■ 2015Q2 ■ 2016Q2



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.