

Tourist profile trend (2017)

Canary Islands: Third Quarter



How many are they and how much do they spend?



How do they book?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	2,512,640	2,660,041	2,711,186	3,190,171	3,363,476
Average daily expenditure (€)	121.22	123.92	135.96	132.88	134.21
.in their place of residence	85.74	88.11	98.85	96.12	96.88
.in the Canary Islands	35.48	35.81	37.11	36.76	37.33
Average lenght of stay	9.86	9.74	9.77	9.71	9.46
Turnover per tourist (€)	1,086	1,098	1,200	1,174	1,151
Total turnover (> 16 years old) (€m)	2,727	2,921	3,254	3,744	3,872
Share of total turnover	24.3%	24.5%	25.0%	25.0%	--
Share of total tourist	24.1%	24.3%	24.0%	24.3%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	41.64	35.76	44.64	48.83	45.62
- Accommodation	35.95	30.39	37.39	40.99	37.23
- Additional accommodation expenses	5.69	5.37	7.25	7.83	8.39
Transport:	26.51	24.36	27.46	25.92	26.25
- Public transport	4.87	4.37	5.07	5.28	4.82
- Taxi	6.79	6.90	7.19	6.55	6.45
- Car rental	14.85	13.09	15.19	14.09	14.98
Food and drink:	132.06	138.73	142.26	142.03	146.04
- Food purchases at supermarkets	57.93	64.56	65.06	56.89	59.65
- Restaurants	74.13	74.17	77.21	85.14	86.39
Souvenirs:	66.93	63.61	59.95	58.51	53.36
Leisure:	46.32	47.38	46.86	44.13	43.65
- Organized excursions	20.88	21.44	20.74	20.08	20.37
- Leisure, amusement	6.80	7.16	7.65	6.56	6.93
- Trip to other islands	2.23	1.93	1.83	2.40	2.01
- Sporting activities	5.75	5.68	5.48	5.71	6.03
- Cultural activities	2.24	2.24	2.42	2.52	1.69
- Discos and disco-pubs	8.41	8.92	8.74	6.86	6.62
Others:	18.76	13.67	14.24	13.24	13.10
- Wellness	2.97	2.57	3.06	3.16	2.40
- Medical expenses	1.15	1.10	1.31	1.88	1.13
- Other expenses	14.64	9.99	9.88	8.20	9.57

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.6%	0.5%	0.6%	0.6%	0.5%
Between 2 and 7 days	7.8%	9.0%	6.2%	5.5%	6.2%
Between 8 and 15 days	11.2%	9.8%	9.4%	7.8%	8.3%
Between 16 and 30 days	15.8%	14.7%	14.5%	12.7%	12.2%
Between 31 and 90 days	29.1%	27.5%	28.9%	29.2%	28.9%
More than 90 days	35.5%	38.6%	40.5%	44.1%	43.9%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	10.0%	9.4%	9.3%	8.3%	9.6%
Flight and accommodation (room only)	23.8%	22.8%	22.5%	24.0%	25.3%
Flight and accommodation (B&B)	5.4%	5.5%	6.0%	6.5%	6.9%
Flight and accommodation (half board)	20.4%	19.3%	18.9%	20.7%	18.7%
Flight and accommodation (full board)	3.7%	4.0%	3.9%	4.4%	4.0%
Flight and accommodation (all inclusive)	36.7%	39.1%	39.4%	36.2%	35.5%
% Tourists using low-cost airlines	46.9%	46.4%	49.3%	49.3%	52.7%
Other expenses in their place of residence:					
- Car rental	10.8%	10.4%	10.9%	12.0%	12.3%
- Sporting activities	6.1%	5.8%	5.8%	5.6%	5.5%
- Excursions	5.9%	6.3%	6.5%	6.4%	7.3%
- Trip to other islands	1.3%	1.2%	0.9%	1.2%	1.2%

(*) 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?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	39.1%	41.8%	40.7%	38.6%	39.1%
- Tour Operator's website	75.9%	76.4%	77.8%	79.8%	79.6%
Accommodation	13.7%	12.3%	13.5%	14.2%	14.4%
- Accommodation's website	82.3%	80.4%	81.4%	84.6%	83.5%
Travel agency (High street)	24.7%	24.3%	23.6%	24.5%	22.7%
Online Travel Agency (OTA)	15.5%	14.9%	15.3%	16.5%	16.6%
No need to book accommodation	7.0%	6.8%	6.9%	6.2%	7.1%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	41.3%	44.5%	43.3%	40.4%	41.6%
- Tour Operator's website	73.2%	74.3%	75.7%	76.9%	78.8%
Airline	24.7%	21.6%	22.8%	25.0%	24.7%
- Airline's website	95.6%	95.1%	95.8%	95.7%	96.6%
Travel agency (High street)	22.4%	22.3%	22.0%	22.8%	21.6%
Online Travel Agency (OTA)	11.6%	11.6%	11.9%	11.8%	12.1%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	7.2%	7.6%	7.8%	7.6%	7.4%
4* Hotel	39.0%	39.5%	41.3%	41.2%	39.1%
1-2-3* Hotel	15.7%	16.9%	15.7%	13.8%	14.4%
Apartment	30.5%	28.3%	27.9%	30.7%	32.1%
Property (privately-owned, friends, family)	6.4%	6.4%	6.2%	5.0%	5.4%
Others	1.2%	1.4%	1.1%	1.8%	1.7%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	48.8%	48.9%	49.2%	47.5%	47.4%
Percentage of women	51.2%	51.1%	50.8%	52.5%	52.6%
Age					
Average age (tourists > 16 years old)	38.0	38.2	39.3	41.8	41.6
Standard deviation	12.4	12.7	12.6	14.4	14.4
Age range (> 16 years old)					
16-24 years old	16.3%	17.1%	14.9%	13.6%	14.6%
25-30 years old	17.7%	17.0%	14.9%	13.4%	13.1%
31-45 years old	36.6%	35.6%	38.0%	32.8%	32.2%
46-60 years old	25.9%	25.9%	27.3%	29.0%	29.3%
Over 60 years old	3.5%	4.3%	4.9%	11.1%	10.8%
Occupation					
Business owner or self-employed	23.7%	23.8%	23.9%	23.2%	24.4%
Upper/Middle management employee	39.2%	40.2%	40.3%	39.0%	38.1%
Auxiliary level employee	20.0%	20.4%	20.2%	18.3%	18.2%
Students	10.3%	9.2%	8.5%	7.9%	8.6%
Retired	3.3%	3.6%	4.1%	9.3%	8.7%
Unemployed / unpaid dom. work	3.5%	2.9%	2.9%	2.4%	2.1%
Annual household income level					
€12,000 - €24,000	21.5%	22.6%	20.8%	20.7%	21.2%
€24,001 - €36,000	21.6%	22.3%	19.5%	20.4%	21.2%
€36,001 - €48,000	16.5%	15.9%	16.5%	16.1%	15.7%
€48,001 - €60,000	14.9%	13.6%	14.2%	14.7%	14.4%
€60,001 - €72,000	7.9%	7.7%	9.2%	9.3%	8.5%
€72,001 - €84,000	5.2%	4.7%	5.4%	5.0%	5.4%
More than €84,000	12.4%	13.0%	14.3%	13.9%	13.7%

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Which island do they choose?

Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	491,243	508,699	544,296	604,857	645,448
- Fuerteventura	411,931	440,855	447,593	484,107	493,948
- Gran Canaria	625,351	656,504	675,982	847,744	910,485
- Tenerife	933,438	997,622	987,323	1,184,832	1,237,883
- La Palma	33,517	35,685	38,837	46,789	57,969

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	19.7%	19.3%	20.2%	19.1%	19.3%
- Fuerteventura	16.5%	16.7%	16.6%	15.3%	14.8%
- Gran Canaria	25.1%	24.9%	25.1%	26.8%	27.2%
- Tenerife	37.4%	37.8%	36.6%	37.4%	37.0%
- La Palma	1.3%	1.4%	1.4%	1.5%	1.7%

Who do they come with?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	8.1%	7.7%	7.5%	6.6%	7.4%
Only with partner	41.7%	41.1%	40.1%	40.3%	38.6%
Only with children (under the age of 13)	2.0%	2.2%	2.1%	2.4%	2.6%
Partner + children (under the age of 13)	15.0%	15.9%	17.8%	16.9%	16.9%
Other relatives	6.4%	5.9%	6.6%	6.4%	6.6%
Friends	6.5%	6.5%	5.1%	5.4%	5.7%
Work colleagues	0.3%	0.3%	0.2%	0.1%	0.2%
Other combinations ⁽¹⁾	20.0%	20.4%	20.6%	21.8%	22.0%

* Multi-choice 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)	93.2%	93.7%	93.6%	94.5%	93.6%
Average rating (scale 1-10)	8.82	8.85	8.89	8.93	8.91

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	69.1%	68.5%	69.3%	70.3%	69.3%
In love (at least 10 previous visits)	11.2%	10.3%	10.9%	10.9%	11.9%

Where are they from?

Ten main source markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
United Kingdom	809,529	900,701	937,317	1,111,515	1,199,852
Germany	472,311	526,595	493,995	591,310	620,012
Spanish Mainland	442,146	426,386	446,585	496,792	484,756
Netherlands	106,389	102,452	114,586	150,406	149,052
France	87,817	105,482	127,370	139,687	135,221
Italy	74,711	75,782	93,488	122,775	132,053
Ireland	100,483	104,588	100,012	109,738	117,495
Belgium	64,902	68,680	79,051	92,959	96,870
Poland	5,579	41,847	41,942	33,839	76,135
Switzerland	55,911	55,235	52,483	64,929	74,020

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	86.1%	86.5%	85.9%	86.5%	86.2%
Beaches	41.1%	41.5%	40.3%	40.3%	41.3%
Tranquillidad/descanso/relax	37.3%	36.0%	35.8%	34.8%	35.2%
Tranquillity/rest/relaxation	19.2%	21.7%	22.0%	21.2%	22.6%
Scenery	17.3%	18.4%	17.8%	18.2%	18.7%
Visiting new places	15.8%	16.7%	15.4%	13.3%	13.5%
Price	9.4%	10.9%	10.9%	10.4%	10.1%
Suitable destination for children	4.0%	3.7%	7.7%	11.2%	8.8%
Ease of travel	5.6%	5.5%	5.7%	7.2%	6.4%
Quality of the environment	6.0%	5.9%	6.6%	6.0%	6.3%
Theme parks	4.5%	5.3%	5.0%	5.0%	5.3%
Nightlife/fun	5.9%	5.5%	4.9%	3.9%	4.3%
Active tourism	4.3%	3.6%	3.9%	3.6%	3.9%
Culture	2.5%	2.5%	2.9%	2.8%	3.1%
Shopping	2.5%	3.0%	3.1%	2.3%	2.8%
Nautical activities	3.2%	2.8%	2.6%	2.7%	2.3%

* Multi-choice question

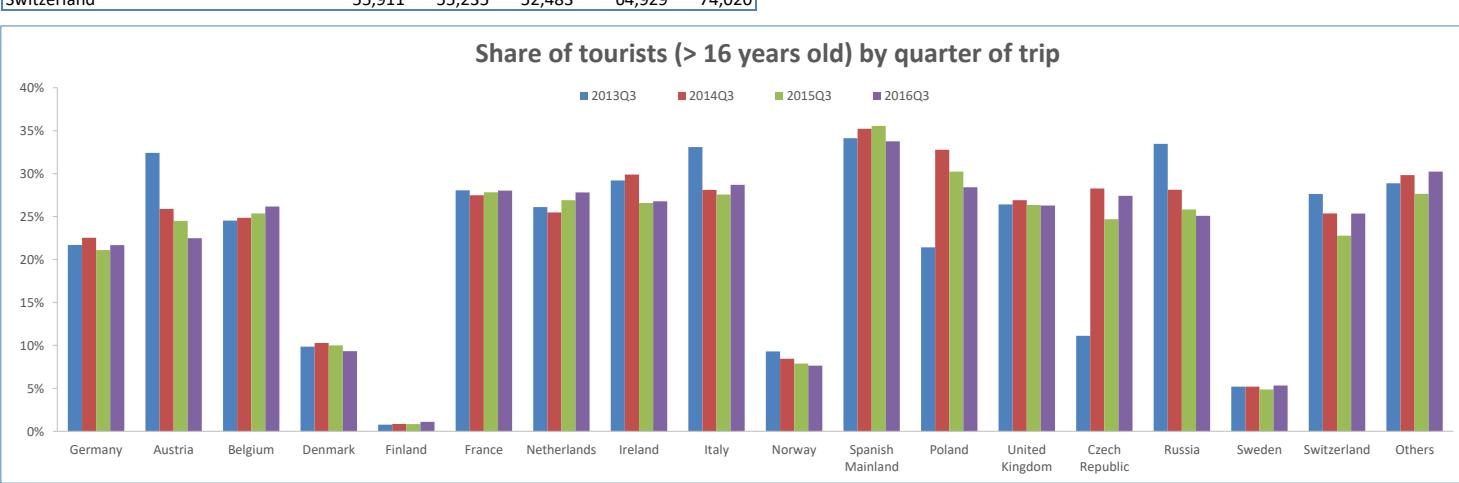
What did motivate them to come?

Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	55.3%	54.8%	55.9%	56.0%	56.7%
Recommendation by friends or relatives	38.2%	38.6%	38.1%	38.2%	39.0%
The Canary Islands television channel	0.5%	0.5%	0.4%	0.3%	0.4%
Other television or radio channels	1.0%	0.8%	1.0%	1.0%	1.0%
Information in the press/magazines/books	4.1%	4.1%	3.9%	4.1%	3.9%
Attendance at a tourism fair	0.6%	0.6%	0.5%	0.5%	0.6%
Tour Operator's brochure or catalogue	10.9%	11.4%	11.0%	9.4%	8.2%
Recommendation by Travel Agency	13.2%	12.6%	12.6%	12.5%	12.5%
Information obtained via the Internet	28.0%	29.5%	29.4%	28.7%	28.8%
Senior Tourism programme	0.1%	0.1%	0.1%	0.2%	0.1%
Others	6.9%	6.4%	5.4%	5.4%	5.0%

* Multi-choice question

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

■ 2013Q3 ■ 2014Q3 ■ 2015Q3 ■ 2016Q3



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.