

Tourist profile trend (2017)

Fuerteventura: First Quarter



How many are they and how much do they spend?



How do they book?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	366,481	363,967	394,726	473,171	465,858
Average daily expenditure (€)	117.58	115.52	120.13	129.92	132.94
.in their place of residence	90.75	89.61	94.04	99.90	105.30
.in the Canary Islands	26.83	25.91	26.09	30.02	27.64
Average lenght of stay	10.04	9.95	10.05	10.33	9.03
Turnover per tourist (€)	1,092	1,067	1,100	1,191	1,105
Total turnover (> 16 years old) (€m)	400	389	434	563	515
Share of total turnover	24.7%	23.3%	23.5%	25.6%	--
Share of total tourist	24.2%	22.8%	23.7%	24.7%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	24.09	28.20	25.48	38.49	25.75
- Accommodation	19.12	23.75	20.38	34.43	22.11
- Additional accommodation expenses	4.97	4.45	5.10	4.06	3.64
Transport:	31.85	25.72	25.74	27.35	25.30
- Public transport	4.31	4.17	2.68	5.97	3.81
- Taxi	5.33	5.15	5.00	6.46	5.81
- Car rental	22.21	16.40	18.07	14.93	15.68
Food and drink:	94.89	86.02	97.63	118.50	85.85
- Food purchases at supermarkets	42.75	31.03	36.01	42.77	31.12
- Restaurants	52.15	54.99	61.63	75.74	54.73
Souvenirs:	51.29	63.13	52.86	44.44	44.73
Leisure:	28.61	27.10	23.59	38.60	25.79
- Organized excursions	10.10	9.69	8.21	10.17	9.87
- Leisure, amusement	1.87	2.37	2.38	2.92	3.08
- Trip to other islands	3.19	2.55	2.59	4.65	1.47
- Sporting activities	8.21	8.28	6.13	13.46	6.12
- Cultural activities	0.81	1.52	1.78	3.58	1.36
- Discos and disco-pubs	4.43	2.69	2.49	3.81	3.88
Others:	19.47	10.75	14.84	18.02	39.83
- Wellness	6.50	3.10	3.08	3.91	5.06
- Medical expenses	2.06	1.68	4.54	2.19	2.30
- Other expenses	10.91	5.97	7.22	11.92	32.46

How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.2%	0.2%	0.3%	0.3%	0.5%
Between 2 and 7 days	6.3%	8.0%	6.4%	5.7%	5.6%
Between 8 and 15 days	12.6%	11.9%	10.0%	10.1%	9.3%
Between 16 and 30 days	18.7%	22.0%	17.7%	18.3%	16.4%
Between 31 and 90 days	39.8%	30.4%	37.2%	36.4%	38.8%
More than 90 days	22.3%	27.5%	28.4%	29.2%	29.5%

What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	4.7%	4.5%	4.5%	3.7%	3.4%
Flight and accommodation (room only)	18.4%	15.1%	18.0%	17.8%	15.3%
Flight and accommodation (B&B)	3.0%	2.5%	3.6%	7.0%	5.4%
Flight and accommodation (half board)	22.9%	17.1%	17.2%	20.0%	17.7%
Flight and accommodation (full board)	4.9%	4.2%	4.1%	3.7%	5.9%
Flight and accommodation (all inclusive)	46.1%	56.7%	52.7%	47.8%	52.3%
% Tourists using low-cost airlines	36.6%	38.2%	36.2%	47.4%	47.4%
Other expenses in their place of residence:					
- Car rental	14.8%	9.4%	13.7%	11.5%	12.7%
- Sporting activities	10.2%	8.7%	11.9%	11.1%	10.3%
- Excursions	4.1%	4.9%	4.9%	5.8%	4.0%
- Trip to other islands	1.7%	2.1%	1.5%	1.2%	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?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation booking					
Tour Operator	47.8%	51.7%	49.5%	45.2%	49.9%
- Tour Operator's website	73.1%	68.3%	77.9%	75.7%	80.0%
Accommodation	9.6%	8.7%	10.8%	12.3%	11.0%
- Accommodation's website	79.4%	91.1%	82.5%	84.1%	84.7%
Travel agency (High street)	26.9%	25.9%	20.9%	22.0%	19.3%
Online Travel Agency (OTA)	13.2%	11.8%	16.2%	18.0%	17.5%
No need to book accommodation	2.6%	2.0%	2.5%	2.4%	2.3%

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight booking					
Tour Operator	50.2%	52.3%	51.4%	47.8%	50.7%
- Tour Operator's website	70.0%	68.4%	73.9%	72.1%	79.7%
Airline	14.7%	15.8%	16.7%	17.9%	18.0%
- Airline's website	94.4%	90.6%	97.8%	96.7%	97.4%
Travel agency (High street)	25.0%	22.9%	18.7%	19.9%	19.2%
Online Travel Agency (OTA)	10.1%	9.0%	13.2%	14.4%	12.0%

Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	2.8%	2.3%	3.0%	4.2%	3.0%
4* Hotel	51.4%	51.9%	53.0%	49.9%	54.9%
1-2-3* Hotel	17.2%	21.8%	19.4%	19.5%	18.7%
Apartment	26.2%	21.7%	21.6%	23.5%	20.8%
Property (privately-owned, friends, family)	2.2%	1.8%	2.2%	2.2%	1.4%
Others	0.3%	0.6%	0.7%	0.7%	1.1%

Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Gender					
Percentage of men	44.1%	48.8%	49.1%	52.1%	47.7%
Percentage of women	55.9%	51.2%	50.9%	47.9%	52.3%
Age					
Average age (tourists > 16 years old)	47.9	49.7	48.2	47.1	50.0
Standard deviation	14.8	14.7	14.9	14.6	15.1
Age range (> 16 years old)					
16-24 years old	5.2%	5.9%	5.2%	5.3%	4.1%
25-30 years old	9.8%	6.9%	11.5%	10.0%	7.2%
31-45 years old	31.0%	26.1%	26.5%	33.4%	27.9%
46-60 years old	29.7%	34.1%	33.5%	30.8%	34.0%
Over 60 years old	24.3%	27.1%	23.2%	20.5%	26.8%
Occupation					
Business owner or self-employed	24.0%	22.7%	22.0%	20.7%	23.1%
Upper/Middle management employee	35.6%	35.9%	38.8%	40.3%	38.2%
Auxiliary level employee	12.7%	11.1%	12.4%	12.3%	12.2%
Students	3.9%	4.4%	3.1%	5.9%	2.4%
Retired	21.6%	24.1%	21.6%	19.2%	22.3%
Unemployed / unpaid dom. work	2.2%	1.7%	2.0%	1.5%	1.8%
Annual household income level					
€12,000 - €24,000	17.2%	16.7%	16.7%	15.0%	13.0%
€24,001 - €36,000	20.3%	18.9%	18.0%	19.5%	18.0%
€36,001 - €48,000	20.2%	18.7%	18.4%	20.7%	15.7%
€48,001 - €60,000	15.0%	15.6%	16.5%	15.2%	15.7%
€60,001 - €72,000	7.2%	9.6%	8.5%	8.9%	10.0%
€72,001 - €84,000	4.3%	6.1%	5.8%	5.1%	7.3%
More than €84,000	15.9%	14.4%	16.1%	15.6%	20.3%

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Which island do they choose?

Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	429,077	466,498	483,781	560,886	587,352
- Fuerteventura	366,481	363,967	394,726	473,171	465,858
- Gran Canaria	819,171	895,237	871,881	991,937	1,048,751
- Tenerife	1,059,587	1,150,121	1,179,865	1,261,312	1,325,439
- La Palma	48,806	36,356	42,548	61,898	78,022

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	15.8%	16.0%	16.3%	16.7%	16.8%
- Fuerteventura	13.5%	12.5%	13.3%	14.1%	13.3%
- Gran Canaria	30.1%	30.7%	29.3%	29.6%	29.9%
- Tenerife	38.9%	39.5%	39.7%	37.7%	37.8%
- La Palma	1.8%	1.2%	1.4%	1.8%	2.2%

Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	11.4%	8.3%	8.5%	11.4%	7.3%
Only with partner	57.7%	58.6%	59.6%	53.0%	53.2%
Only with children (under the age of 13)	1.0%	0.5%	0.5%	0.7%	1.3%
Partner + children (under the age of 13)	7.3%	9.5%	9.8%	10.7%	12.1%
Other relatives	5.0%	4.0%	5.4%	4.8%	4.0%
Friends	6.4%	6.2%	4.9%	6.6%	5.2%
Work colleagues	0.1%	0.2%	0.3%	0.2%	0.1%
Other combinations ⁽¹⁾	11.2%	12.7%	10.9%	12.6%	16.8%

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

How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	89.9%	91.3%	88.9%	93.5%	93.1%
Average rating (scale 1-10)	8.58	8.66	8.47	8.81	8.73

How many are loyal to the destination?

Repeat tourists of the island	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	50.6%	54.4%	51.4%	53.2%	53.6%
In love (at least 10 previous visits)	6.8%	4.4%	7.4%	7.3%	6.1%

Where are they from?



Ten main source markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Germany	159,836	165,972	175,214	195,204	187,805
United Kingdom	73,274	80,215	89,558	111,806	118,257
France	25,076	21,132	25,719	24,628	22,006
Italy	9,337	10,290	12,700	18,011	19,437
Sweden	2,718	21,020	16,070	12,937	19,233
Netherlands	15,881	10,152	11,204	14,439	17,580
Spanish Mainland	16,810	9,762	14,119	19,760	16,038
Poland	1,961	7,599	11,877	7,626	14,125
Switzerland	10,703	5,362	5,594	8,408	10,093
Denmark	0	10,403	7,994	5,208	8,294

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	94.7%	96.3%	94.5%	95.3%	95.5%
Beaches	54.2%	52.5%	52.9%	49.5%	50.3%
Tranquillity/rest/relaxation	49.1%	48.4%	47.6%	45.0%	45.5%
Scenery	11.3%	14.1%	17.2%	15.1%	14.9%
Security	6.7%	4.7%	6.8%	12.6%	13.0%
Price	11.4%	14.9%	14.4%	15.5%	12.9%
Visiting new places	14.1%	12.4%	11.5%	10.0%	12.7%
Ease of travel	9.8%	9.9%	9.1%	8.4%	11.0%
Suitable destination for children	3.8%	4.6%	5.0%	5.7%	6.5%
Quality of the environment	3.6%	4.3%	3.4%	5.8%	4.2%
Nautical activities	3.5%	3.5%	3.6%	5.3%	3.6%
Active tourism	3.3%	3.5%	3.6%	5.4%	3.1%
Golf	0.7%	1.0%	0.9%	1.1%	1.6%
Shopping	1.2%	1.2%	1.4%	0.7%	1.1%
Security against natural catastrophes	0.2%	0.4%	0.7%	0.6%	0.9%
Health-related tourism	1.4%	0.3%	0.7%	0.5%	0.9%

* Multi-choice question

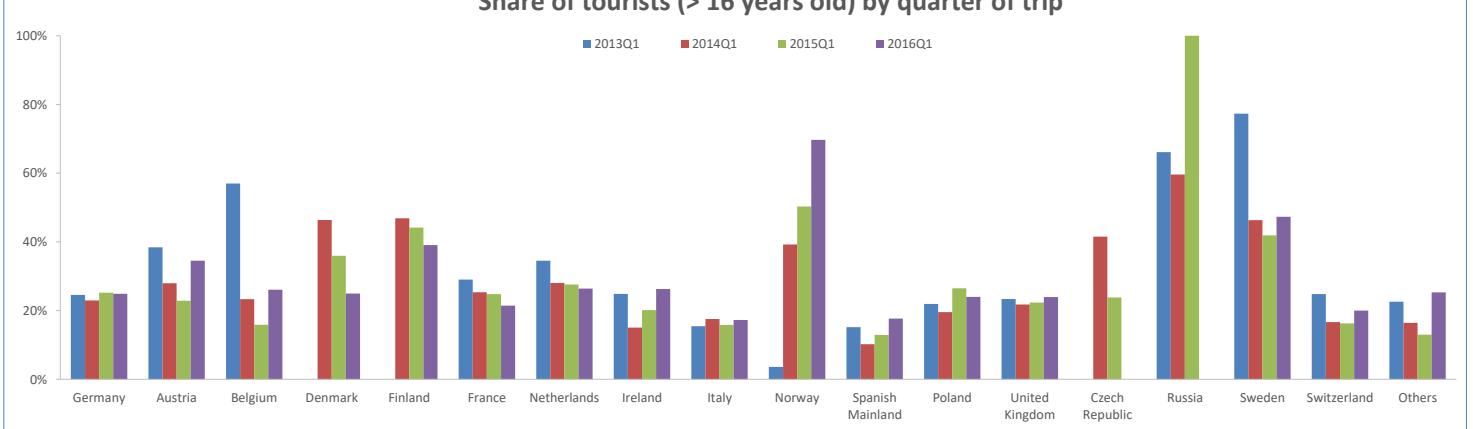
What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	67.3%	72.6%	71.7%	68.0%	71.7%
Recommendation by friends or relatives	29.6%	26.4%	26.9%	30.7%	29.3%
The Canary Islands television channel	0.2%	0.2%	0.4%	0.3%	0.3%
Other television or radio channels	0.6%	0.9%	0.9%	0.9%	0.9%
Information in the press/magazines/books	3.0%	5.3%	4.0%	4.0%	4.8%
Attendance at a tourism fair	0.4%	0.5%	0.6%	0.3%	0.8%
Tour Operator's brochure or catalogue	10.2%	9.5%	10.7%	6.9%	7.8%
Recommendation by Travel Agency	9.6%	11.7%	10.8%	12.7%	10.0%
Information obtained via the Internet	29.8%	26.8%	28.5%	32.5%	30.0%
Senior Tourism programme	0.1%	0.1%	0.2%	0.1%	0.2%
Others	3.4%	4.3%	4.1%	4.1%	5.6%

* Multi-choice question

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



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.