

Tourist profile trend (2017)

Spanish Mainland: 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)	442,146	426,386	446,585	496,792	484,756
Average daily expenditure (€)	118.35	119.52	129.08	129.46	134.34
.in their place of residence	77.75	80.02	86.97	87.70	90.70
.in the Canary Islands	40.60	39.50	42.11	41.76	43.64
Average lenght of stay	8.20	8.37	8.48	8.86	8.47
Turnover per tourist (€)	848	859	921	967	962
Total turnover (> 16 years old) (€m)	375	366	411	480	466
Share of total turnover	37.7%	38.1%	40.3%	39.4%	--
Share of total tourist	34.1%	35.2%	35.6%	33.8%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	51.62	42.97	47.37	55.69	53.96
- Accommodation	44.25	35.09	39.28	46.57	45.38
- Additional accommodation expenses	7.37	7.89	8.09	9.12	8.58
Transport:	37.60	36.16	37.32	37.29	37.00
- Public transport	6.23	5.61	6.02	6.19	5.63
- Taxi	4.71	4.99	4.64	4.98	4.79
- Car rental	26.65	25.55	26.66	26.11	26.59
Food and drink:	102.75	111.33	114.96	130.01	126.24
- Food purchases at supermarkets	38.71	46.33	46.91	41.10	39.04
- Restaurants	64.04	65.00	68.04	88.91	87.20
Souvenirs:	56.42	50.72	47.13	54.72	48.03
Leisure:	37.64	42.04	48.14	43.11	38.66
- Organized excursions	15.38	17.49	18.71	17.20	13.78
- Leisure, amusement	6.42	6.77	10.42	7.92	7.53
- Trip to other islands	2.50	2.68	3.05	4.14	2.96
- Sporting activities	3.68	4.13	4.03	4.19	4.83
- Cultural activities	2.56	3.18	3.53	2.88	2.02
- Discos and disco-pubs	7.10	7.79	8.40	6.78	7.53
Others:	9.33	11.36	14.02	13.50	10.61
- Wellness	1.62	1.95	3.22	1.77	1.74
- Medical expenses	0.56	0.71	0.70	0.86	0.88
- Other expenses	7.15	8.70	10.09	10.86	7.99

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.7%	0.4%	0.9%	0.6%	0.6%
Between 2 and 7 days	11.6%	10.9%	9.6%	7.7%	7.0%
Between 8 and 15 days	15.1%	12.8%	11.8%	10.1%	8.9%
Between 16 and 30 days	22.0%	22.5%	21.7%	16.9%	17.1%
Between 31 and 90 days	33.5%	37.1%	37.1%	37.8%	36.2%
More than 90 days	17.1%	16.2%	18.8%	26.8%	30.2%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	16.3%	14.9%	18.8%	16.9%	15.2%
Flight and accommodation (room only)	19.6%	19.1%	16.4%	18.5%	22.2%
Flight and accommodation (B&B)	6.3%	6.7%	7.0%	7.0%	7.4%
Flight and accommodation (half board)	21.5%	21.8%	22.6%	23.9%	21.7%
Flight and accommodation (full board)	5.8%	6.7%	6.4%	6.3%	8.0%
Flight and accommodation (all inclusive)	30.5%	30.8%	28.8%	27.4%	25.5%
% Tourists using low-cost airlines	55.7%	52.5%	55.0%	55.9%	58.9%
Other expenses in their place of residence:					
- Car rental	22.7%	26.5%	24.7%	26.6%	28.7%
- Sporting activities	2.5%	2.0%	2.6%	2.9%	2.6%
- Excursions	5.7%	7.1%	7.4%	7.5%	8.2%
- Trip to other islands	2.0%	2.3%	1.6%	1.9%	2.1%

(*) 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	13.8%	15.0%	13.3%	12.3%	12.0%
- Tour Operator's website	77.3%	82.9%	73.9%	77.6%	76.6%
Accommodation	18.6%	18.5%	17.7%	19.3%	20.0%
- Accommodation's website	81.8%	84.2%	82.1%	83.1%	81.3%
Travel agency (High street)	32.3%	32.2%	32.7%	33.4%	30.5%
Online Travel Agency (OTA)	22.3%	22.5%	20.4%	20.7%	25.5%
No need to book accommodation	13.1%	11.7%	15.8%	14.3%	12.1%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	19.1%	19.0%	19.3%	16.8%	17.4%
- Tour Operator's website	74.7%	76.9%	72.6%	74.9%	75.2%
Airline	33.4%	33.5%	33.4%	36.1%	36.0%
- Airline's website	97.7%	98.3%	97.8%	97.5%	98.5%
Travel agency (High street)	30.5%	31.1%	31.4%	32.7%	29.8%
Online Travel Agency (OTA)	17.0%	16.4%	16.0%	14.4%	16.7%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	7.4%	10.1%	9.4%	8.4%	8.3%
4* Hotel	42.0%	40.2%	41.9%	40.7%	40.3%
1-2-3* Hotel	12.0%	14.2%	12.2%	12.1%	12.0%
Apartment	25.3%	24.1%	20.5%	24.1%	27.2%
Property (privately-owned, friends, family)	12.3%	10.1%	14.9%	12.4%	11.1%
Others	1.0%	1.3%	1.2%	2.2%	1.2%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	51.4%	53.4%	52.2%	51.0%	48.9%
Percentage of women	48.6%	46.6%	47.8%	49.0%	51.1%
Age					
Average age (tourists > 16 years old)	36.4	37.3	38.4	40.8	39.8
Standard deviation	10.7	11.0	11.2	12.8	12.6
Age range (> 16 years old)					
16-24 years old	12.5%	12.5%	11.7%	9.7%	12.2%
25-30 years old	20.5%	19.9%	16.5%	13.7%	15.0%
31-45 years old	47.7%	45.1%	46.0%	43.8%	41.1%
46-60 years old	17.3%	20.2%	23.0%	24.9%	25.5%
Over 60 years old	2.0%	2.4%	2.7%	7.8%	6.1%
Occupation					
Business owner or self-employed	18.7%	20.5%	20.2%	17.9%	19.0%
Upper/Middle management employee	33.9%	34.1%	34.0%	36.9%	34.8%
Auxiliary level employee	28.2%	27.8%	29.2%	27.6%	28.3%
Students	10.7%	9.8%	8.4%	7.3%	9.2%
Retired	2.1%	2.1%	2.8%	6.2%	4.8%
Unemployed / unpaid dom. work	6.4%	5.6%	5.4%	4.1%	3.9%
Annual household income level					
€12,000 - €24,000	36.7%	34.6%	32.5%	29.2%	32.6%
€24,001 - €36,000	27.0%	28.0%	26.8%	26.7%	26.8%
€36,001 - €48,000	13.7%	14.1%	17.4%	17.8%	16.3%
€48,001 - €60,000	10.4%	10.3%	9.6%	11.5%	10.4%
€60,001 - €72,000	4.7%	4.8%	5.0%	6.3%	5.3%
€72,001 - €84,000	2.8%	3.1%	3.0%	3.0%	3.3%
More than €84,000	4.7%	5.0%	5.7%	5.6%	5.4%

Tourist profile trend (2017)

Spanish Mainland: Third Quarter



Which island do they choose?

Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	85,322	86,002	75,022	77,779	69,209
- Fuerteventura	48,811	43,618	47,734	44,079	38,229
- Gran Canaria	138,668	133,578	145,332	172,974	176,238
- Tenerife	152,830	142,818	160,914	184,150	181,392
- La Palma	14,110	16,400	13,522	13,279	15,016

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	19.4%	20.4%	17.0%	15.8%	14.4%
- Fuerteventura	11.1%	10.3%	10.8%	9.0%	8.0%
- Gran Canaria	31.5%	31.6%	32.8%	35.1%	36.7%
- Tenerife	34.8%	33.8%	36.4%	37.4%	37.8%
- La Palma	3.2%	3.9%	3.1%	2.7%	3.1%

Who do they come with?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	12.8%	13.1%	14.1%	11.2%	12.1%
Only with partner	45.2%	42.0%	41.0%	37.7%	37.2%
Only with children (under the age of 13)	1.3%	1.7%	1.8%	2.6%	2.3%
Partner + children (under the age of 13)	16.8%	18.0%	18.8%	22.5%	19.4%
Other relatives	4.0%	3.3%	4.4%	4.4%	5.0%
Friends	6.7%	6.4%	5.9%	5.3%	6.2%
Work colleagues	0.4%	0.8%	0.7%	0.4%	0.5%
Other combinations ⁽¹⁾	12.8%	14.7%	13.2%	15.9%	17.3%

* 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)	93.8%	93.6%	93.4%	94.2%	93.4%
Average rating (scale 1-10)	8.84	8.82	8.90	8.87	8.87

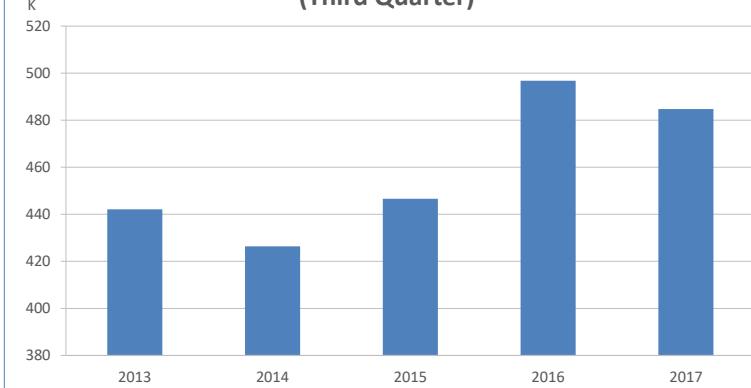
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	74.5%	75.7%	75.5%	76.3%	75.4%
In love (at least 10 previous visits)	9.6%	11.6%	11.7%	13.1%	14.5%

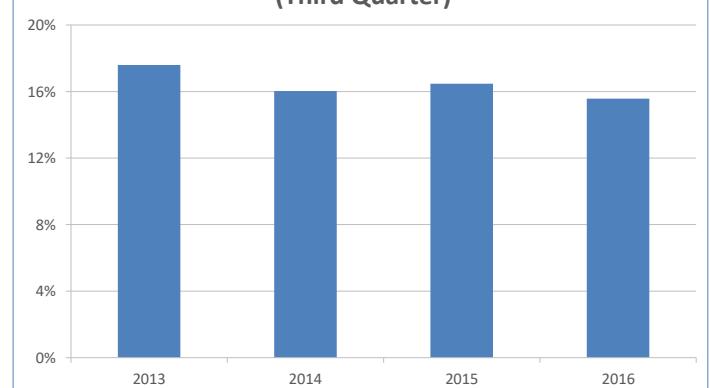
Where does the flight come from?

Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Spanish Mainland	99.6%	99.3%	99.8%	99.6%	99.8%
United Kingdom	0.0%	0.1%	0.0%	0.2%	0.1%
France	0.0%	0.0%	0.0%	0.0%	0.1%
Germany	0.0%	0.1%	0.0%	0.0%	0.0%
Belgium	0.0%	0.1%	0.1%	0.0%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%

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.