

Tourist profile trend (2017)

Fuerteventura: Fourth Quarter

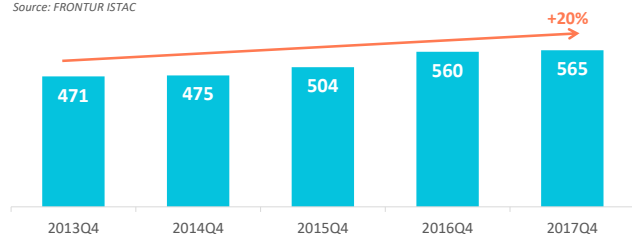
How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR) (thousands)	471	475	504	560	565
Tourist arrivals (> 16 years old) (thousands)	407	399	437	495	513
Average daily expenditure (€)	128.02	124.15	129.39	133.16	141.52
. in their place of residence	100.39	98.52	100.35	106.09	112.69
. in the Canary Islands	27.63	25.63	29.04	27.07	28.82
Average length of stay	9.03	9.19	9.21	9.17	9.22
Turnover per tourist (€)	1,086	1,054	1,126	1,145	1,216
Total turnover (> 16 years old) (€m)	511	500	568	641	687
Share of annual tourist	26.6%	25.2%	25.6%	25.7%	25.5%
Share of annual turnover	27.0%	25.4%	26.0%	25.6%	26.5%
% tourists who pay in the Canary Islands:					
Accommodation:					
- Accommodation	8.7%	9.7%	9.3%	8.7%	7.9%
- Additional accommodation expenses	7.9%	5.5%	5.4%	5.2%	2.5%
Transport:					
- Public transport	11.6%	16.7%	14.1%	11.6%	10.3%
- Taxi	19.1%	18.5%	21.2%	18.4%	15.8%
- Car rental	22.8%	20.2%	22.7%	18.7%	17.5%
Food and drink:					
- Food purchases at supermarkets	49.3%	45.3%	45.9%	44.1%	47.8%
- Restaurants	48.6%	51.7%	52.7%	50.5%	52.9%
Souvenirs:	61.5%	65.1%	58.0%	58.8%	53.3%
Leisure:					
- Organized excursions	13.0%	13.8%	13.5%	13.2%	16.3%
- Leisure, amusement	5.1%	7.8%	6.1%	5.8%	8.2%
- Trip to other islands	2.3%	3.9%	3.5%	2.9%	4.4%
- Sporting activities	9.9%	12.3%	14.0%	12.4%	12.8%
- Cultural activities	3.1%	4.5%	5.8%	4.9%	5.0%
- Discos and disco-pubs	4.5%	4.1%	7.5%	6.6%	5.4%
Others:					
- Wellness	5.3%	8.1%	9.8%	10.5%	5.7%
- Medical expenses	3.2%	3.8%	5.8%	4.7%	4.4%
- Other expenses	17.3%	10.8%	14.2%	9.9%	12.1%

TOURIST ARRIVALS (thousands)

Source: FRONTUR ISTAT



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	4.2%	4.0%	3.8%	3.5%	3.4%
Flight and accommodation (room only)	14.0%	15.0%	17.1%	17.2%	17.1%
Flight and accommodation (B&B)	4.1%	4.1%	4.4%	4.2%	3.5%
Flight and accommodation (half board)	21.4%	16.9%	16.1%	16.4%	17.6%
Flight and accommodation (full board)	4.0%	5.8%	4.6%	5.1%	4.9%
Flight and accommodation (all inclusive)	52.3%	54.2%	53.9%	53.7%	53.5%
% Tourists using low-cost airlines	40.5%	43.8%	43.9%	47.4%	45.6%
Other expenses in their place of residence:					
- Car rental	11.0%	11.1%	12.1%	11.5%	14.6%
- Sporting activities	8.9%	12.1%	10.0%	10.5%	8.3%
- Excursions	3.3%	4.4%	4.7%	3.7%	3.7%
- Trip to other islands	1.1%	1.4%	1.6%	0.9%	1.1%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	44.5%	47.5%	45.8%	43.7%	47.7%
- Tour Operator's website	78.3%	67.1%	74.5%	75.6%	75.8%
Accommodation	8.4%	9.1%	10.9%	11.9%	10.5%
- Accommodation's website	86.8%	75.3%	82.0%	87.3%	89.3%
Travel agency (High street)	29.6%	26.8%	24.5%	25.7%	25.2%
Online Travel Agency (OTA)	14.6%	14.3%	16.5%	17.0%	14.5%
No need to book accommodation	2.8%	2.4%	2.3%	1.7%	2.2%
Flight booking					
Tour Operator	47.8%	48.6%	48.1%	45.3%	48.8%
- Tour Operator's website	73.2%	66.7%	72.9%	68.5%	73.5%
Airline	15.3%	16.6%	16.9%	19.1%	18.3%
- Airline's website	95.6%	94.5%	95.9%	96.9%	96.3%
Travel agency (High street)	25.3%	24.3%	22.4%	23.6%	22.6%
Online Travel Agency (OTA)	11.6%	10.5%	12.5%	12.0%	10.3%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.3%	0.4%	0.2%	0.2%	0.2%
Between 2 and 7 days	10.7%	7.5%	6.4%	5.4%	3.9%
Between 8 and 15 days	10.7%	10.1%	7.9%	7.4%	6.8%
Between 16 and 30 days	19.6%	17.9%	15.5%	17.6%	13.5%
Between 31 and 90 days	31.2%	34.4%	38.0%	33.2%	34.3%
More than 90 days	27.6%	29.7%	31.9%	36.3%	41.3%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	45.8%	44.2%	47.3%	48.8%	48.4%
Women	54.2%	55.8%	52.7%	51.2%	51.6%
Age					
Average age (tourists > 16 years old)	45.4	45.5	47.3	47.8	50.2
Standard deviation	14.1	13.8	15.1	14.8	15.0
Age range (> 16 years old)					
16-24 years old	6.1%	5.7%	5.7%	5.1%	3.6%
25-30 years old	10.6%	10.5%	12.2%	9.8%	9.2%
31-45 years old	34.1%	34.2%	27.4%	31.3%	25.2%
46-60 years old	33.9%	34.6%	33.3%	32.1%	33.1%
Over 60 years old	15.4%	15.1%	21.4%	21.7%	28.8%
Occupation					
Business owner or self-employed	23.6%	20.9%	20.1%	21.5%	20.1%
Upper/Middle management employee	44.6%	45.2%	40.8%	40.7%	38.6%
Auxiliary level employee	11.0%	13.1%	14.2%	13.7%	14.0%
Students	3.1%	3.7%	3.1%	3.7%	2.2%
Retired	12.1%	14.8%	20.0%	18.7%	23.7%
Unemployed / unpaid dom. work	5.6%	2.3%	1.8%	1.7%	1.5%
Annual household income level					
€12,000 - €24,000	16.9%	14.8%	15.1%	14.4%	15.6%
€24,001 - €36,000	17.6%	18.2%	20.1%	17.4%	18.2%
€36,001 - €48,000	13.5%	16.6%	17.7%	18.2%	16.2%
€48,001 - €60,000	17.1%	17.1%	14.7%	13.9%	16.3%
€60,001 - €72,000	14.4%	9.1%	9.0%	9.8%	11.1%
€72,001 - €84,000	5.4%	5.7%	5.5%	6.6%	7.0%
More than €84,000	15.0%	18.4%	17.9%	19.7%	15.6%

Tourist profile trend (2017)

Fuerteventura: Fourth Quarter

Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	482,417	467,397	527,062	600,909	658,457
- Fuerteventura	407,337	398,938	437,284	495,222	513,386
- Gran Canaria	901,778	863,399	951,656	1,064,140	1,108,297
- Tenerife	1,123,476	1,092,650	1,144,231	1,280,669	1,357,305
- La Palma	35,785	37,346	45,080	65,961	86,566

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	16.3%	16.3%	17.0%	17.1%	17.7%
- Fuerteventura	13.8%	14.0%	14.1%	14.1%	13.8%
- Gran Canaria	30.6%	30.2%	30.6%	30.3%	29.8%
- Tenerife	38.1%	38.2%	36.8%	36.5%	36.4%
- La Palma	1.2%	1.3%	1.5%	1.9%	2.3%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	2.6%	3.2%	3.3%	3.0%	2.9%
4* Hotel	55.5%	52.8%	53.1%	54.4%	52.7%
1-2-3* Hotel	20.1%	21.1%	18.1%	18.4%	20.7%
Apartment	18.7%	20.0%	22.7%	22.4%	21.0%
Property (privately-owned, friends, family)	2.6%	2.0%	2.0%	1.1%	1.5%
Others	0.5%	0.8%	0.8%	0.7%	1.2%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	95.3%	94.4%	95.4%	94.3%	95.5%
Beaches	61.6%	59.9%	58.9%	57.4%	61.8%
Tranquillity/rest/relaxation	51.3%	46.9%	48.1%	46.1%	45.0%
Scenery	10.1%	11.3%	13.9%	10.7%	13.3%
Visiting new places	14.2%	11.9%	10.5%	11.6%	11.1%
Security	5.1%	6.3%	10.1%	11.9%	10.7%
Price	10.0%	13.5%	12.7%	12.3%	8.4%
Ease of travel	8.2%	7.1%	6.6%	8.0%	8.1%
Suitable destination for children	6.6%	10.9%	5.5%	7.9%	6.2%
Nautical activities	5.5%	4.7%	4.6%	4.6%	4.9%
Quality of the environment	3.4%	3.7%	4.6%	3.5%	4.8%
Active tourism	2.8%	3.1%	2.3%	3.0%	2.2%
Culture	0.8%	0.8%	1.5%	1.6%	1.4%
Golf	0.3%	0.4%	1.2%	0.8%	1.3%
Security against natural catastrophes	0.6%	0.2%	0.7%	1.1%	1.1%
Nightlife/fun	0.9%	1.1%	1.4%	0.8%	0.9%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	11.3%	7.8%	7.5%	7.2%	5.6%
Only with partner	54.2%	46.2%	56.0%	47.4%	52.0%
Only with children (under the age of 13)	1.1%	1.4%	0.9%	1.5%	1.2%
Partner + children (under the age of 13)	10.6%	16.6%	9.3%	15.1%	11.9%
Other relatives	5.7%	6.7%	6.4%	8.0%	5.0%
Friends	4.2%	4.7%	6.6%	4.2%	6.1%
Work colleagues	0.1%	0.4%	0.3%	0.1%	0.3%
Other combinations ⁽¹⁾	12.9%	16.3%	13.0%	16.6%	17.9%

* 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)	94.6%	94.6%	93.9%	92.2%	93.8%
Average rating (scale 1-10)	8.71	8.80	8.82	8.74	8.89

How many are loyal to the Canary Islands?

Repeat tourists (previous visits)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 visit to the island	53.3%	51.9%	51.2%	53.2%	51.3%
At least 10 visits to the island	6.8%	6.5%	6.7%	7.8%	7.3%
At least 1 visit to the Canary Islands	80.7%	79.7%	78.7%	82.2%	80.3%
At least 10 visits to the Canary Islands	20.0%	17.0%	16.5%	17.7%	17.2%

Where are they from?

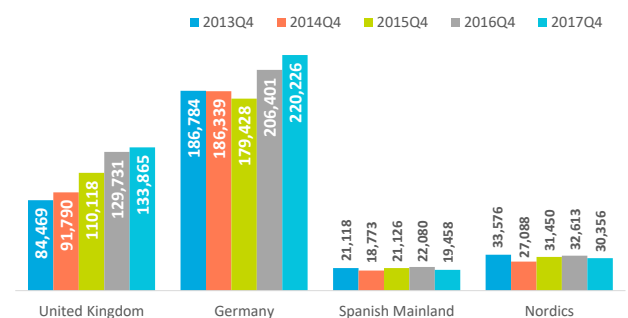
	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Germany	45.9%	46.7%	41.0%	41.7%	42.9%
United Kingdom	20.7%	23.0%	25.2%	26.2%	26.1%
France	3.7%	3.8%	4.3%	3.7%	4.0%
Spanish Mainland	5.2%	4.7%	4.8%	4.5%	3.8%
Italy	3.6%	3.3%	5.0%	4.8%	3.6%
Netherlands	2.6%	2.6%	2.6%	2.7%	3.4%
Sweden	0.0%	3.9%	3.8%	2.9%	3.0%
Switzerland	3.4%	2.9%	2.9%	2.6%	2.6%
Poland	0.3%	2.0%	2.4%	1.7%	2.5%
Others	14.7%	7.2%	8.0%	9.3%	8.3%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	71.0%	69.2%	70.2%	70.6%	69.8%
Recommendation by friends/relatives	26.7%	27.6%	30.6%	30.2%	32.3%
The Canary Islands television channel	0.1%	0.3%	0.4%	0.6%	0.6%
Other television or radio channels	0.4%	0.9%	0.7%	0.6%	1.6%
Information in press/magazines/books	4.5%	4.1%	3.5%	2.7%	3.3%
Attendance at a tourism fair	0.3%	0.3%	0.2%	0.4%	0.3%
Tour Operator's brochure or catalogue	9.3%	9.0%	9.5%	9.4%	7.4%
Recommendation by Travel Agency	15.1%	13.5%	13.4%	11.7%	12.9%
Information obtained via the Internet	31.4%	27.4%	28.0%	28.3%	25.3%
Senior Tourism programme	0.0%	0.0%	0.2%	0.2%	0.2%
Others	5.7%	5.5%	4.2%	4.4%	2.9%

* Multi-choice question

Main markets: tourist arrivals



Tourists over 16 years old.

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.