

Tourist profile trend (2017)

Gran Canaria: Fourth Quarter

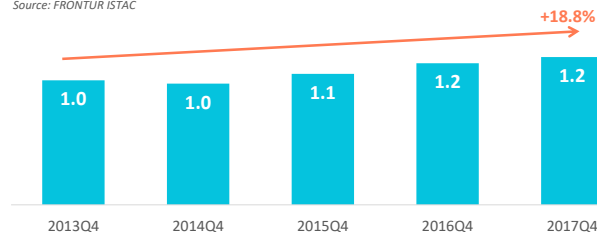
How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR) (mill.)	1.05	1.02	1.10	1.19	1.25
Tourist arrivals (> 16 years old) (mill.)	0.90	0.86	0.95	1.06	1.11
Average daily expenditure (€)	135.94	137.46	148.68	150.87	150.52
. in their place of residence	93.22	96.60	105.39	108.26	107.53
. in the Canary Islands	42.72	40.86	43.29	42.61	42.99
Average length of stay	9.15	9.72	9.67	8.93	9.13
Turnover per tourist (€)	1,052	1,137	1,253	1,213	1,229
Total turnover (> 16 years old) (€m)	1,103	1,160	1,383	1,447	1,531
Share of annual tourist	31.2%	28.9%	30.2%	28.8%	27.8%
Share of annual turnover	30.2%	29.1%	31.1%	29.1%	28.3%
% tourists who pay in the Canary Islands:					
Accommodation:					
- Accommodation	13.0%	10.6%	13.9%	15.0%	12.4%
- Additional accommodation expenses	4.7%	5.5%	4.5%	6.0%	4.8%
Transport:					
- Public transport	19.7%	16.9%	19.3%	22.2%	18.8%
- Taxi	22.3%	24.8%	23.3%	29.0%	24.1%
- Car rental	12.3%	11.4%	12.3%	14.9%	13.6%
Food and drink:					
- Food purchases at supermarkets	64.1%	55.4%	58.0%	59.1%	56.2%
- Restaurants	52.1%	54.2%	51.2%	56.8%	61.0%
Souvenirs:	53.3%	48.2%	48.1%	53.4%	48.3%
Leisure:					
- Organized excursions	14.2%	10.7%	12.5%	15.5%	12.9%
- Leisure, amusement	5.4%	5.5%	5.8%	5.7%	5.5%
- Trip to other islands	1.1%	0.9%	1.3%	1.8%	0.8%
- Sporting activities	4.7%	3.8%	3.9%	5.0%	4.9%
- Cultural activities	1.7%	2.3%	2.0%	3.3%	3.2%
- Discos and disco-pubs	8.0%	8.0%	6.5%	8.2%	6.5%
Others:					
- Wellness	5.0%	5.4%	5.1%	6.0%	4.6%
- Medical expenses	2.8%	3.2%	3.5%	4.3%	3.5%
- Other expenses	7.9%	7.6%	10.3%	10.4%	7.3%

TOURIST ARRIVALS (million)

Source: FRONTUR ISTAT



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	10.7%	12.4%	10.4%	8.7%	10.0%
Flight and accommodation (room only)	31.1%	27.7%	27.7%	30.6%	30.8%
Flight and accommodation (B&B)	9.5%	11.2%	9.8%	8.7%	8.8%
Flight and accommodation (half board)	18.2%	15.8%	18.1%	19.9%	17.7%
Flight and accommodation (full board)	5.7%	5.0%	5.0%	4.4%	4.1%
Flight and accommodation (all inclusive)	24.8%	28.0%	29.0%	27.8%	28.7%
% Tourists using low-cost airlines	36.3%	33.0%	36.6%	41.6%	42.8%
Other expenses in their place of residence:					
- Car rental	7.1%	7.5%	7.9%	7.9%	9.7%
- Sporting activities	4.8%	3.4%	3.6%	3.5%	3.7%
- Excursions	4.0%	4.3%	4.6%	4.7%	4.7%
- Trip to other islands	5.1%	4.7%	5.2%	1.8%	1.7%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	47.4%	50.1%	50.4%	47.1%	46.4%
- Tour Operator's website	84.2%	84.8%	82.5%	78.9%	83.8%
Accommodation	10.4%	11.6%	11.1%	13.0%	12.3%
- Accommodation's website	87.4%	79.0%	80.3%	82.3%	85.8%
Travel agency (High street)	21.2%	19.1%	17.3%	18.4%	17.5%
Online Travel Agency (OTA)	12.1%	10.1%	13.3%	14.6%	16.6%
No need to book accommodation	8.9%	9.1%	7.9%	6.9%	7.3%
Flight booking					
Tour Operator	49.5%	51.0%	52.1%	50.3%	47.7%
- Tour Operator's website	83.7%	82.2%	81.9%	75.6%	81.5%
Airline	18.0%	21.0%	20.7%	22.9%	23.9%
- Airline's website	95.7%	96.3%	94.7%	95.8%	96.4%
Travel agency (High street)	22.0%	19.1%	17.8%	16.9%	17.1%
Online Travel Agency (OTA)	10.6%	8.9%	9.4%	10.0%	11.2%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	1.6%	0.7%	0.7%	0.5%	0.5%
Between 2 and 7 days	12.8%	10.5%	8.4%	8.0%	6.5%
Between 8 and 15 days	12.3%	9.3%	8.8%	6.9%	9.4%
Between 16 and 30 days	14.1%	14.4%	14.6%	13.8%	14.6%
Between 31 and 90 days	31.4%	32.3%	34.4%	36.3%	34.6%
More than 90 days	27.9%	32.8%	33.2%	34.4%	34.4%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	50.4%	49.8%	52.2%	51.4%	50.0%
Women	49.6%	50.2%	47.8%	48.6%	50.0%
Age					
Average age (tourists > 16 years old)	42.8	47.0	48.8	48.4	49.0
Standard deviation	13.6	14.9	15.3	15.6	15.6
Age range (> 16 years old)					
16-24 years old	8.2%	7.7%	6.6%	7.6%	6.8%
25-30 years old	14.5%	8.9%	8.7%	8.6%	8.4%
31-45 years old	35.9%	28.9%	24.9%	26.4%	26.8%
46-60 years old	30.4%	34.1%	34.5%	31.5%	31.5%
Over 60 years old	11.0%	20.3%	25.3%	25.9%	26.6%
Occupation					
Business owner or self-employed	20.2%	19.4%	19.8%	21.2%	20.5%
Upper/Middle management employee	41.5%	41.7%	37.7%	36.1%	35.4%
Auxiliary level employee	19.8%	14.4%	16.4%	15.1%	15.5%
Students	5.5%	4.9%	4.0%	4.9%	4.3%
Retired	10.6%	17.6%	19.9%	21.0%	22.6%
Unemployed / unpaid dom. work	2.3%	2.1%	2.2%	1.7%	1.8%
Annual household income level					
€12,000 - €24,000	13.0%	14.2%	16.0%	15.6%	15.5%
€24,001 - €36,000	20.4%	16.5%	16.8%	18.3%	16.6%
€36,001 - €48,000	16.5%	17.8%	16.8%	17.2%	16.5%
€48,001 - €60,000	13.8%	15.8%	14.9%	15.2%	16.3%
€60,001 - €72,000	12.6%	9.4%	10.3%	9.6%	10.8%
€72,001 - €84,000	7.8%	7.4%	7.4%	6.6%	7.1%
More than €84,000	16.1%	18.9%	17.8%	17.6%	17.3%

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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	6.3%	7.1%	7.2%	6.1%	6.4%
4* Hotel	24.9%	29.1%	28.0%	29.1%	26.9%
1-2-3* Hotel	22.0%	17.9%	18.1%	18.2%	18.3%
Apartment	30.2%	30.4%	31.5%	36.3%	38.3%
Property (privately-owned, friends, family)	7.4%	7.1%	6.2%	4.8%	4.9%
Others	9.3%	8.4%	9.0%	5.5%	5.3%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	90.0%	88.4%	89.5%	90.3%	91.5%
Beaches	43.0%	38.2%	39.9%	41.0%	42.0%
Tranquillity/rest/relaxation	38.1%	40.5%	41.2%	40.1%	41.3%
Scenery	15.4%	15.5%	17.2%	16.1%	15.9%
Security	7.0%	6.4%	9.9%	11.8%	12.1%
Visiting new places	12.8%	10.6%	11.3%	12.7%	11.5%
Price	10.2%	14.3%	10.4%	10.9%	10.2%
Ease of travel	6.7%	7.7%	6.9%	7.8%	7.4%
Suitable destination for children	8.8%	6.0%	5.2%	5.5%	6.5%
Nightlife/fun	7.8%	5.6%	5.4%	4.9%	4.4%
Quality of the environment	3.3%	4.0%	4.5%	3.8%	4.0%
Active tourism	4.0%	2.7%	4.0%	3.3%	3.9%
Shopping	2.4%	4.2%	3.1%	3.1%	2.5%
Culture	1.1%	2.0%	2.1%	2.1%	2.1%
Nautical activities	2.3%	1.1%	1.6%	2.0%	1.6%
Golf	1.3%	0.8%	1.2%	1.0%	1.1%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	18.4%	16.3%	14.8%	12.7%	13.0%
Only with partner	38.8%	46.4%	50.9%	42.9%	44.2%
Only with children (under the age of 13)	0.7%	1.3%	1.0%	1.9%	1.7%
Partner + children (under the age of 13)	9.5%	8.7%	7.3%	8.6%	8.4%
Other relatives	4.6%	5.2%	5.8%	7.4%	6.8%
Friends	7.6%	6.3%	6.5%	7.3%	6.5%
Work colleagues	0.6%	0.7%	0.5%	0.6%	0.6%
Other combinations ⁽¹⁾	19.7%	15.2%	13.2%	18.6%	18.7%

* 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)	93.6%	93.1%	92.5%	91.4%	92.9%
Average rating (scale 1-10)	8.79	8.77	8.77	8.68	8.82

How many are loyal to the Canary Islands?

Repeat tourists (previous visits)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 visit to the island	53.7%	59.1%	64.1%	59.1%	62.2%
At least 10 visits to the island	8.6%	9.1%	12.1%	9.3%	11.7%
At least 1 visit to the Canary Islands	74.9%	79.5%	82.3%	79.8%	82.2%
At least 10 visits to the Canary Islands	17.3%	19.2%	22.4%	19.8%	22.2%

Where are they from?

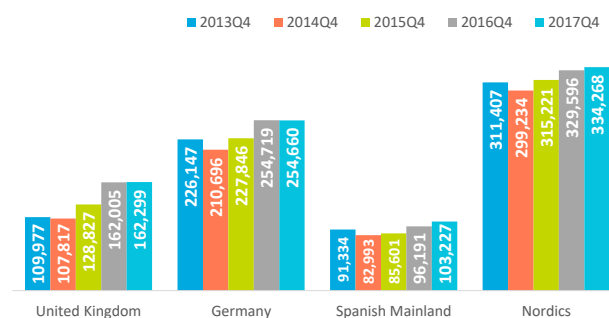
	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Germany	25.1%	24.4%	23.9%	23.9%	23.0%
United Kingdom	12.2%	12.5%	13.5%	15.2%	14.6%
Sweden	13.8%	13.0%	12.8%	13.8%	11.5%
Norway	11.3%	11.1%	10.8%	10.4%	9.9%
Spanish Mainland	10.1%	9.6%	9.0%	9.0%	9.3%
Netherlands	5.0%	4.7%	4.8%	5.0%	4.8%
Denmark	4.2%	4.8%	4.6%	3.1%	4.4%
Finland	5.2%	5.7%	4.9%	3.7%	4.3%
Switzerland	2.4%	2.8%	2.5%	2.8%	3.4%
Others	10.7%	11.4%	13.1%	13.0%	14.6%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	61.5%	65.6%	69.9%	67.2%	69.1%
Recommendation by friends/relatives	31.7%	31.9%	28.3%	31.2%	31.9%
The Canary Islands television channel	0.5%	0.4%	0.3%	0.2%	0.2%
Other television or radio channels	0.6%	0.6%	0.6%	0.7%	0.9%
Information in press/magazines/books	3.8%	3.1%	3.5%	4.0%	3.4%
Attendance at a tourism fair	0.5%	0.5%	0.4%	0.5%	0.6%
Tour Operator's brochure or catalogue	8.6%	7.7%	7.8%	7.7%	6.5%
Recommendation by Travel Agency	9.1%	8.8%	7.6%	9.7%	8.3%
Information obtained via the Internet	24.8%	21.2%	23.8%	25.4%	26.0%
Senior Tourism programme	0.1%	0.1%	0.3%	0.1%	0.1%
Others	9.4%	10.2%	9.9%	7.5%	7.9%

* 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.