

Tourist profile trend (2017)

La Palma: Fourth Quarter

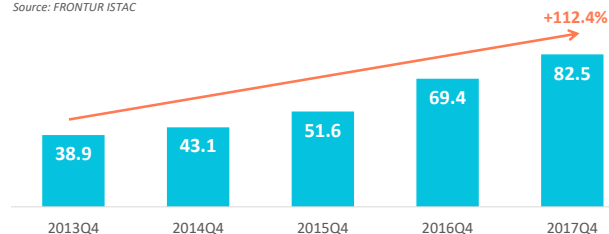
How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR) (thousands)	38.9	43.1	51.6	69.4	82.5
Tourist arrivals (> 16 years old) (thousands)	35.8	37.3	45.1	66.0	86.6
Average daily expenditure (€)	126.34	120.65	114.69	130.88	151.39
. in their place of residence	90.66	84.40	78.19	92.21	101.74
. in the Canary Islands	35.68	36.26	36.50	38.67	49.65
Average length of stay	9.64	9.85	10.18	9.49	9.94
Turnover per tourist (€)	1,124	1,091	1,072	1,103	1,398
Total turnover (> 16 years old) (€m)	43.7	47.0	55.3	76.5	115
Share of annual tourist	25.8%	26.6%	27.4%	29.1%	28.1%
Share of annual turnover	24.8%	25.9%	26.4%	28.6%	32.8%
% tourists who pay in the Canary Islands:					
Accommodation:					
- Accommodation	20.8%	18.0%	18.6%	13.4%	21.5%
- Additional accommodation expenses	6.6%	9.3%	9.0%	13.8%	6.0%
Transport:					
- Public transport	25.4%	23.7%	21.2%	15.0%	14.0%
- Taxi	18.8%	12.3%	14.0%	7.6%	13.8%
- Car rental	29.0%	40.6%	46.1%	43.7%	47.9%
Food and drink:					
- Food purchases at supermarkets	75.0%	73.4%	69.9%	61.0%	57.3%
- Restaurants	79.2%	70.3%	72.0%	71.6%	75.1%
Souvenirs:					
	56.6%	57.5%	56.6%	47.2%	60.9%
Leisure:					
- Organized excursions	18.5%	23.0%	14.2%	17.7%	23.6%
- Leisure, amusement	3.3%	3.5%	2.6%	3.1%	2.6%
- Trip to other islands	1.4%	1.0%	2.1%	1.1%	1.0%
- Sporting activities	3.7%	6.2%	5.2%	7.5%	3.0%
- Cultural activities	4.8%	7.3%	9.0%	8.2%	12.6%
- Discos and disco-pubs	2.1%	1.4%	0.9%	2.4%	7.2%
Others:					
- Wellness	2.7%	4.5%	4.7%	5.1%	3.2%
- Medical expenses	5.0%	4.3%	6.2%	3.5%	12.0%
- Other expenses	18.7%	23.7%	12.5%	13.8%	15.6%

TOURIST ARRIVALS (thousands)

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	14.0%	13.6%	13.9%	14.9%	15.0%
Flight and accommodation (room only)	39.4%	35.9%	37.0%	33.6%	31.8%
Flight and accommodation (B&B)	8.7%	11.1%	5.7%	18.7%	13.7%
Flight and accommodation (half board)	24.4%	22.5%	23.5%	22.9%	19.3%
Flight and accommodation (full board)	1.8%	0.9%	1.4%	2.0%	5.7%
Flight and accommodation (all inclusive)	11.8%	16.0%	18.5%	8.0%	14.6%
% Tourists using low-cost airlines	18.5%	26.6%	40.1%	43.1%	34.7%
Other expenses in their place of residence:					
- Car rental	37.6%	41.7%	33.2%	34.2%	29.4%
- Sporting activities	3.6%	5.8%	5.8%	3.5%	3.8%
- Excursions	5.4%	9.1%	10.6%	7.0%	11.2%
- Trip to other islands	1.0%	1.4%	1.5%	3.5%	2.0%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	45.0%	32.7%	31.9%	28.5%	39.1%
- Tour Operator's website	82.7%	87.4%	83.6%	85.6%	70.5%
Accommodation	14.7%	10.4%	18.0%	17.6%	16.8%
- Accommodation's website	69.4%	82.9%	90.8%	89.0%	92.2%
Travel agency (High street)	23.1%	22.4%	18.7%	22.6%	12.1%
Online Travel Agency (OTA)	13.8%	27.6%	25.7%	25.3%	26.8%
No need to book accommodation	3.4%	6.8%	5.8%	5.9%	5.2%
Flight booking					
Tour Operator	50.3%	34.5%	36.4%	34.0%	41.5%
- Tour Operator's website	74.9%	85.4%	84.4%	89.2%	67.9%
Airline	15.5%	27.8%	26.3%	29.5%	34.6%
- Airline's website	95.3%	97.1%	97.9%	92.9%	99.1%
Travel agency (High street)	21.4%	21.3%	21.4%	21.0%	11.0%
Online Travel Agency (OTA)	12.8%	16.3%	15.9%	15.5%	12.8%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.0%	0.0%	0.0%	0.1%	0.2%
Between 2 and 7 days	11.2%	6.9%	5.5%	3.4%	3.0%
Between 8 and 15 days	11.0%	9.7%	8.9%	6.3%	4.0%
Between 16 and 30 days	17.5%	21.2%	21.6%	10.5%	11.3%
Between 31 and 90 days	35.8%	36.2%	35.9%	43.9%	34.4%
More than 90 days	24.4%	26.1%	28.1%	35.8%	47.1%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	47.0%	45.4%	47.2%	54.9%	58.7%
Women	53.0%	54.6%	52.8%	45.1%	41.3%
Age					
Average age (tourists > 16 years old)	47.5	47.6	48.5	48.9	50.7
Standard deviation	11.9	12.9	12.9	13.6	13.7
Age range (> 16 years old)					
16-24 years old	1.8%	2.9%	3.9%	2.7%	6.4%
25-30 years old	7.6%	11.2%	5.8%	5.9%	4.3%
31-45 years old	31.6%	25.5%	30.5%	31.3%	17.4%
46-60 years old	46.5%	45.3%	43.0%	42.4%	49.6%
Over 60 years old	12.4%	15.1%	16.8%	17.6%	22.3%
Occupation					
Business owner or self-employed	19.8%	21.0%	15.9%	20.3%	22.1%
Upper/Middle management employee	51.4%	55.0%	48.3%	48.2%	44.5%
Auxiliary level employee	14.2%	6.7%	13.8%	9.8%	7.7%
Students	1.6%	1.4%	3.5%	5.5%	6.1%
Retired	10.2%	14.6%	14.5%	15.3%	18.4%
Unemployed / unpaid dom. work	2.8%	1.4%	4.0%	0.9%	1.2%
Annual household income level					
€12,000 - €24,000	11.0%	12.2%	17.1%	11.7%	7.0%
€24,001 - €36,000	20.6%	19.5%	18.0%	21.4%	14.9%
€36,001 - €48,000	19.8%	14.7%	20.1%	15.5%	16.5%
€48,001 - €60,000	21.7%	16.3%	17.0%	21.6%	20.0%
€60,001 - €72,000	6.6%	12.0%	6.8%	13.3%	8.3%
€72,001 - €84,000	3.4%	6.9%	5.4%	4.2%	7.9%
More than €84,000	16.9%	18.5%	15.6%	12.3%	25.3%

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La Palma: 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	0.0%	0.0%	0.0%	0.0%	0.0%
4* Hotel	32.9%	30.7%	35.5%	34.8%	40.5%
1-2-3* Hotel	10.0%	11.2%	11.8%	8.5%	7.4%
Apartment	48.7%	50.5%	44.4%	48.5%	44.1%
Property (privately-owned, friends, family)	4.9%	6.2%	6.1%	5.9%	4.3%
Others	3.5%	1.3%	2.2%	2.3%	3.6%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	87.6%	90.6%	81.9%	86.8%	84.8%
Scenery	56.7%	55.6%	60.9%	58.5%	58.8%
Tranquility/rest/relaxation	53.1%	43.5%	39.3%	38.9%	43.1%
Active tourism	27.0%	36.0%	38.4%	30.9%	30.8%
Quality of the environment	13.4%	16.5%	13.2%	12.0%	18.2%
Visiting new places	8.2%	9.7%	13.7%	17.4%	15.1%
Beaches	9.7%	11.2%	6.9%	16.9%	7.2%
Price	5.2%	7.0%	6.8%	2.3%	5.8%
Security	2.2%	3.6%	2.3%	5.2%	5.7%
Ease of travel	2.2%	4.3%	3.1%	4.0%	3.8%
Rural tourism	3.1%	3.2%	1.8%	1.3%	2.6%
Suitable destination for children	0.7%	0.9%	1.7%	0.5%	1.9%
Culture	1.1%	1.9%	1.3%	2.3%	1.3%
Shopping	0.2%	0.0%	0.6%	0.7%	0.4%
Health-related tourism	0.0%	0.6%	0.1%	0.3%	0.4%
Security against natural catastrophes	0.0%	0.0%	0.0%	0.6%	0.2%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	12.3%	10.7%	12.3%	14.4%	8.6%
Only with partner	64.9%	63.1%	64.0%	60.3%	60.6%
Only with children (under the age of 13)	0.1%	0.3%	0.5%	0.2%	0.2%
Partner + children (under the age of 13)	6.2%	6.1%	3.8%	7.6%	6.7%
Other relatives	3.7%	4.1%	4.0%	4.0%	8.2%
Friends	5.2%	6.4%	3.5%	3.2%	3.9%
Work colleagues	0.6%	0.4%	0.2%	0.0%	0.0%
Other combinations ⁽¹⁾	7.0%	9.1%	11.7%	10.4%	12.0%

* 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%	97.9%	93.8%	97.8%	96.3%
Average rating (scale 1-10)	8.85	9.21	8.99	9.26	9.14

How many are loyal to the Canary Islands?

Repeat tourists (previous visits)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 visit to the island	40.0%	37.2%	34.6%	40.9%	43.9%
At least 10 visits to the island	4.3%	4.4%	4.3%	3.0%	3.4%
At least 1 visit to the Canary Islands	81.2%	82.3%	78.6%	77.4%	88.3%
At least 10 visits to the Canary Islands	11.9%	16.4%	14.4%	16.9%	15.0%

Where are they from?

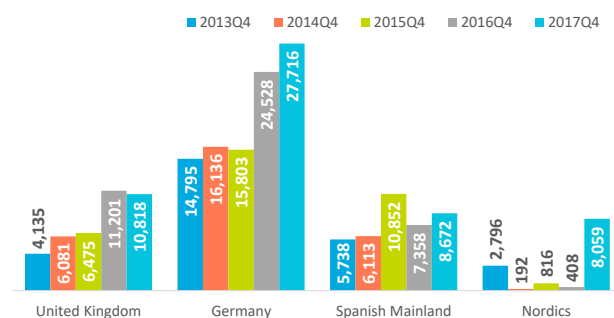
	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Germany	41.3%	43.2%	35.1%	37.2%	32.0%
United Kingdom	11.6%	16.3%	14.4%	17.0%	12.5%
Spanish Mainland	16.0%	16.4%	24.1%	11.2%	10.0%
Netherlands	9.0%	9.6%	8.4%	8.4%	7.8%
Russia	1.0%	0.0%	0.0%	0.0%	6.0%
Italy	1.1%	1.0%	0.7%	0.2%	5.3%
Denmark	1.9%	0.5%	0.4%	0.0%	4.0%
Austria	3.5%	4.0%	4.2%	13.7%	3.5%
Sweden	3.7%	0.0%	0.3%	0.4%	3.1%
Others	10.9%	9.0%	12.5%	12.0%	15.6%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	67.6%	68.5%	65.0%	64.2%	75.7%
Recommendation by friends/relatives	30.3%	29.0%	31.3%	34.2%	24.2%
The Canary Islands television channel	0.5%	0.1%	0.0%	0.2%	0.2%
Other television or radio channels	0.1%	1.7%	3.2%	2.1%	1.7%
Information in press/magazines/books	7.6%	8.9%	8.3%	6.3%	11.8%
Attendance at a tourism fair	0.3%	0.7%	0.7%	0.5%	0.2%
Tour Operator's brochure or catalogue	6.1%	7.5%	6.5%	2.2%	7.3%
Recommendation by Travel Agency	6.5%	7.8%	4.2%	3.7%	4.3%
Information obtained via the Internet	34.1%	27.8%	29.8%	30.1%	31.4%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.3%
Others	5.2%	7.7%	7.2%	4.9%	5.2%

* 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.