

TOURIST PROFILE BY QUARTER OF TRIP (2018)

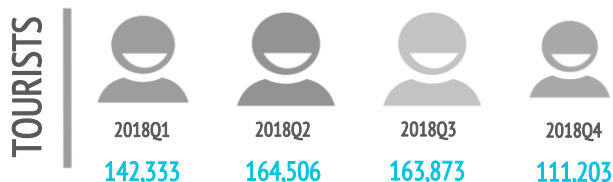
FRANCE

How many are they and how much do they spend?

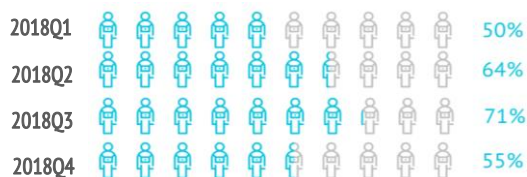


	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR) (*)	142.3	164.5	163.9	111.2	581.9
Tourist arrivals > 15 years old (EGT) (*)	130.6	139.3	133.4	103.2	506.4
- book holiday package (*)	64.8	89.3	95.2	56.5	305.8
- do not book holiday package (*)	65.8	50.0	38.1	46.7	200.6
- % tourists who book holiday package	49.6%	64.1%	71.4%	54.7%	60.4%

(*) Thousand of tourists



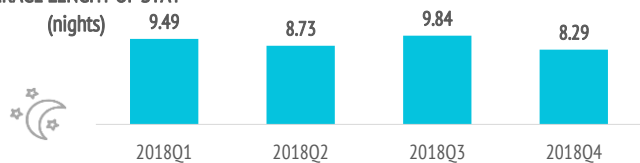
% TOURISTS WHO BOOK HOLIDAY PACKAGE



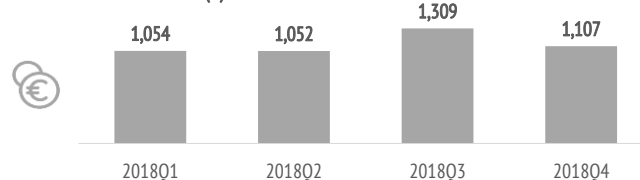
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	1,054	1,052	1,309	1,107	1,132
- book holiday package	1,091	1,050	1,338	1,230	1,182
- holiday package	918	864	1,139	1,048	995
- others	173	186	199	182	186
- do not book holiday package	1,018	1,055	1,238	959	1,055
- flight	270	319	380	273	304
- accommodation	439	388	416	363	404
- others	309	348	442	324	348
Average length of stay	9.49	8.73	9.84	8.29	9.13
- book holiday package	7.90	7.61	8.61	7.49	7.96
- do not book holiday package	11.05	10.74	12.93	9.26	10.91
Average daily expenditure (€)	125.6	133.0	143.8	147.1	136.8
- book holiday package	141.5	143.5	159.3	171.3	153.1
- do not book holiday package	110.0	114.5	105.1	117.8	112.0
Total turnover (> 15 years old) (€m)	138	146	175	114	573
- book holiday package	71	94	127	69	361
- do not book holiday package	67	53	47	45	212

AVERAGE LENGTH OF STAY

(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	79.1%	83.0%	79.6%	80.2%	80.5%
Landscapes	54.5%	51.9%	53.5%	51.0%	52.8%
Tranquility	43.1%	45.3%	52.2%	45.1%	46.5%
Sea	39.9%	44.8%	54.1%	42.6%	45.6%
Safety	43.1%	44.2%	52.3%	36.5%	44.5%
Price	41.8%	43.2%	51.2%	37.7%	43.8%
Accommodation supply	40.6%	44.1%	46.9%	36.7%	42.4%
Environment	35.6%	40.4%	38.8%	39.8%	38.6%
European belonging	38.3%	35.7%	33.8%	38.4%	36.4%
Beaches	24.4%	34.6%	49.4%	31.9%	35.4%
Authenticity	36.0%	29.0%	36.9%	31.4%	33.4%
Exoticism	26.5%	18.9%	28.3%	18.8%	23.3%
Effortless trip	23.9%	21.6%	20.6%	22.2%	22.0%
Gastronomy	17.5%	18.0%	22.8%	20.5%	19.7%
Hiking trail network	17.6%	19.4%	7.8%	16.8%	15.3%
Shopping	15.8%	15.3%	16.7%	13.1%	15.3%
Historical heritage	12.0%	15.1%	13.1%	17.9%	14.3%
Fun possibilities	8.8%	11.5%	18.7%	12.4%	12.9%
Culture	7.7%	11.7%	10.2%	12.6%	10.4%
Nightlife	3.4%	5.1%	8.5%	4.8%	5.5%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")

% of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE FUN POSSIBILITIES



What is the main motivation for their holidays?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	41.5%	36.3%	40.0%	34.6%	38.3%
Enjoy family time	4.6%	6.4%	11.7%	12.1%	8.5%
Have fun	2.3%	3.3%	6.4%	6.1%	4.4%
Explore the destination	47.4%	49.4%	40.3%	41.7%	44.9%
Practice their hobbies	2.2%	2.4%	0.4%	3.3%	2.0%
Other reasons	1.9%	2.1%	1.2%	2.3%	1.8%

How far in advance do they book their trip?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.8%	1.7%	0.8%	0.2%	0.9%
Between 1 and 30 days	33.4%	17.4%	30.3%	22.8%	26.1%
Between 1 and 2 months	28.9%	26.6%	15.5%	29.1%	24.8%
Between 3 and 6 months	27.8%	43.0%	31.9%	30.5%	33.6%
More than 6 months	9.1%	11.3%	21.5%	17.4%	14.7%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

TOURIST PROFILE BY QUARTER OF TRIP (2018)

FRANCE



What channels did they use to get information about the trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	42.9%	29.7%	26.7%	35.8%	33.6%
Friends or relatives	21.5%	22.2%	22.0%	22.3%	22.0%
Internet or social media	53.4%	55.3%	59.1%	51.8%	55.1%
Mass Media	1.3%	1.9%	1.5%	2.1%	1.7%
Travel guides and magazines	20.2%	16.5%	11.0%	14.4%	15.6%
Travel Blogs or Forums	5.7%	4.9%	7.7%	6.2%	6.1%
Travel TV Channels	0.4%	0.7%	0.2%	0.0%	0.4%
Tour Operator or Travel Agency	24.5%	34.7%	33.6%	29.2%	30.6%
Public administrations or similar	0.2%	0.5%	0.5%	0.7%	0.5%
Others	3.1%	1.5%	3.4%	2.7%	2.7%

* Multi-choice question

With whom did they book their flight and accommodation?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	42.8%	30.8%	25.6%	41.7%	34.7%
- Tour Operator or Travel Agency	57.2%	69.2%	74.4%	58.3%	65.3%
Accommodation					
- Directly with the accommodation	34.0%	25.1%	18.0%	31.8%	26.9%
- Tour Operator or Travel Agency	66.0%	74.9%	82.0%	68.2%	73.1%

Where do they stay?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	16.0%	16.4%	15.4%	16.4%	16.0%
4* Hotel	41.9%	47.4%	43.4%	38.5%	43.1%
5* Hotel / 5* Luxury Hotel	5.5%	4.9%	7.4%	5.4%	5.8%
Aparthotel / Tourist Villa	15.8%	13.5%	13.8%	12.9%	14.1%
House/room rented in a private dwelling	8.1%	6.0%	5.1%	10.6%	7.2%
Private accommodation ⁽¹⁾	4.8%	2.5%	4.2%	4.6%	4.0%
Others (Cottage, cruise, camping,...)	7.9%	9.4%	10.7%	11.7%	9.8%

(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.

What do they book?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	25.3%	18.5%	18.2%	26.6%	21.8%
Bed and Breakfast	8.8%	7.1%	6.4%	6.2%	7.1%
Half board	25.2%	15.3%	15.6%	19.0%	18.6%
Full board	7.7%	10.5%	8.0%	9.7%	9.0%
All inclusive	33.0%	48.6%	51.8%	38.6%	43.5%

43.5% of French book all inclusive.



33.0%
2018Q1



51.8%
2018Q3



48.6%
2018Q2



38.6%
2018Q4

Other expenses

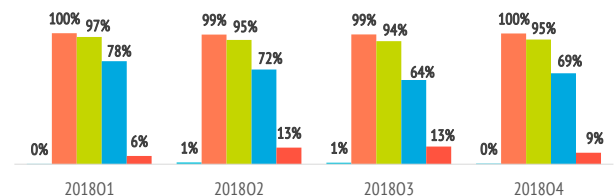
	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	59.5%	50.1%	51.2%	54.4%	53.7%
Supermarkets	45.1%	37.1%	41.5%	43.0%	41.5%
Car rental	43.9%	41.1%	31.5%	39.7%	39.0%
Organized excursions	27.3%	35.6%	41.9%	33.3%	34.7%
Taxi, transfer, chauffeur service	45.9%	54.7%	62.5%	49.3%	53.4%
Theme Parks	7.7%	6.2%	11.8%	5.0%	7.8%
Sport activities	5.0%	7.0%	7.3%	6.0%	6.4%
Museums	11.2%	10.1%	8.3%	10.3%	9.9%
Flights between islands	6.8%	9.4%	6.4%	7.4%	7.5%

Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.3%	1.3%	1.2%	0.5%	0.8%
1 - 2 hours	2.9%	4.1%	5.1%	4.6%	4.2%
3 - 6 hours	18.4%	22.5%	29.6%	25.6%	24.0%
7 - 12 hours	72.1%	59.5%	50.6%	60.5%	60.6%
More than 12 hours	6.3%	12.6%	13.5%	8.7%	10.4%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

0 hours More than 1 hour More than 3 hours More than 7 hours More than 12 hours



Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	72.9%	74.5%	72.5%	73.8%	73.4%
Beach	58.3%	70.3%	78.2%	70.3%	69.3%
Swimming pool, hotel facilities	49.8%	70.2%	80.0%	60.5%	65.6%
Explore the island on their own	64.2%	54.7%	55.9%	60.6%	58.7%
Organized excursions	21.2%	32.2%	34.2%	21.2%	27.6%
Sport activities	15.3%	16.5%	20.7%	17.9%	17.6%
Museums / exhibitions	16.4%	16.3%	15.4%	18.6%	16.6%
Wineries/markets/popular festival:	16.0%	16.2%	16.5%	15.7%	16.1%
Taste Canarian gastronomy	14.4%	16.5%	16.2%	10.7%	14.7%
Sea excursions / whale watching	8.4%	15.1%	17.5%	12.0%	13.4%
Nature activities	17.8%	13.3%	9.3%	12.1%	13.1%
Theme parks	9.2%	10.3%	21.6%	9.3%	12.8%
Nightlife / concerts / shows	9.5%	9.4%	14.6%	7.9%	10.5%
Beauty and health treatments	8.0%	8.1%	11.0%	10.7%	9.4%
Activities at sea	8.0%	7.5%	12.5%	9.4%	9.3%
Astronomical observation	1.0%	1.4%	2.0%	0.9%	1.3%

* Multi-choice question



TOURIST PROFILE BY QUARTER OF TRIP (2018)

FRANCE

Which island do they choose?

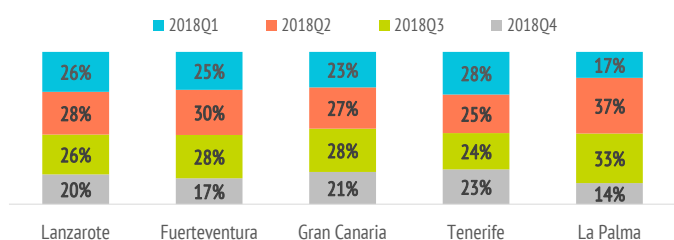
Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	31,910	34,348	31,790	23,913	121,961
Fuerteventura	26,476	31,632	30,345	18,119	106,572
Gran Canaria	21,334	24,897	26,152	19,404	91,787
Tenerife	48,216	43,788	41,191	39,408	172,603
La Palma	1,941	4,173	3,722	1,583	11,420

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	24.6%	24.7%	23.9%	23.3%	24.2%
Fuerteventura	20.4%	22.8%	22.8%	17.7%	21.1%
Gran Canaria	16.4%	17.9%	19.6%	18.9%	18.2%
Tenerife	37.1%	31.5%	30.9%	38.5%	34.2%
La Palma	1.5%	3.0%	2.8%	1.5%	2.3%

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	86.3%	78.7%	85.1%	87.9%	84.2%
Two islands	11.4%	17.4%	13.0%	10.4%	13.3%
Three or more islands	2.2%	3.8%	1.9%	1.7%	2.5%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



Internet usage during their trip

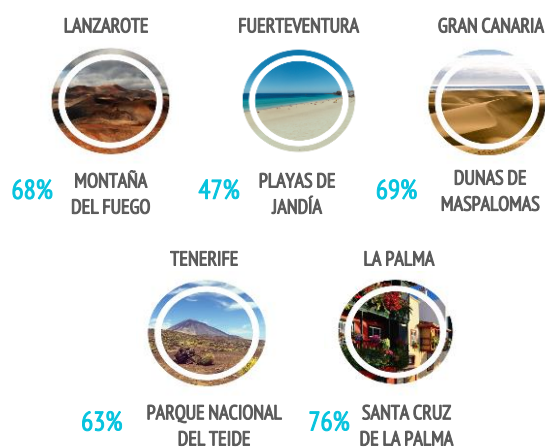
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	7.8%	13.6%	13.0%	8.3%	11.0%
- Flights	7.7%	11.9%	7.5%	7.1%	8.6%
- Accommodation	11.2%	16.0%	14.0%	11.4%	13.2%
- Transport	13.4%	14.7%	12.6%	9.5%	12.7%
- Restaurants	18.2%	16.0%	22.9%	17.6%	18.8%
- Excursions	22.7%	21.3%	26.9%	24.2%	23.9%
- Activities	25.3%	24.0%	29.8%	24.3%	26.0%
Book or purchase					
- Tourist package	25.5%	28.0%	34.1%	26.1%	28.7%
- Flights	64.9%	55.5%	63.7%	67.4%	62.7%
- Accommodation	57.5%	50.3%	56.5%	59.8%	55.8%
- Transport	46.1%	44.6%	48.0%	51.7%	47.4%
- Restaurants	3.5%	11.2%	13.8%	10.0%	9.9%
- Excursions	5.4%	8.8%	17.0%	6.3%	9.9%
- Activities	7.5%	9.0%	15.1%	7.8%	10.1%

* Multi-choice question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	18.1%	17.8%	8.9%	11.9%	14.3%
Used the Internet	81.9%	82.2%	91.1%	88.1%	85.7%
- Own Internet connection	30.9%	34.7%	47.6%	37.9%	37.8%
- Free Wifi connection	37.2%	36.7%	33.8%	36.4%	36.0%
Applications*					
- Search for locations or maps	71.8%	61.5%	64.9%	72.3%	67.2%
- Search for destination info	28.1%	27.5%	32.8%	34.7%	30.6%
- Share pictures or trip videos	61.9%	63.7%	69.4%	61.3%	64.4%
- Download tourist apps	5.1%	9.0%	8.5%	5.6%	7.2%
- Others	16.0%	14.3%	14.1%	18.9%	15.6%

* Multi-choice question

MOST VISITED PLACES IN EACH ISLAND



The data refers to % of tourists on each island who have visited the place.

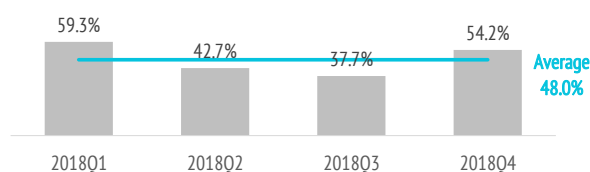
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Average rating	8.39	8.20	8.32	8.36	8.31
Experience in the Canary Islands					
Worse or much worse than expected	3.6%	8.8%	5.6%	3.5%	5.5%
Lived up to expectations	72.7%	67.4%	67.6%	66.9%	68.7%
Better or much better than expected	23.7%	23.8%	26.9%	29.7%	25.8%
Future intentions (scale 1-10)					
Return to the Canary Islands	7.97	7.68	7.77	8.27	7.90
Recommend visiting the Canary Islands	8.59	8.29	8.42	8.58	8.46

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	59.3%	42.7%	37.7%	54.2%	48.0%
Repeat tourists (last 5 years)	57.5%	37.4%	33.5%	50.6%	44.2%
Repeat tourists (last 5 years)(5 or more visits)	12.2%	9.6%	7.4%	12.4%	10.3%
At least 10 previous visits	8.2%	4.9%	4.7%	11.4%	7.0%

REPEAT TOURISTS



TOURIST PROFILE BY QUARTER OF TRIP (2018)

FRANCE

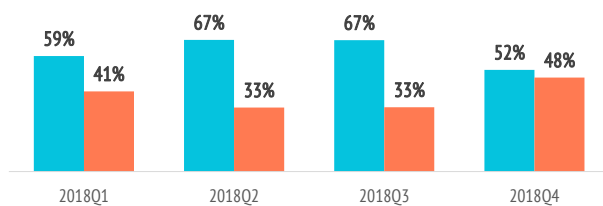
Where does the flight come from?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
France	59.0%	67.3%	67.2%	52.0%	62.0%
Spanish Mainland	19.0%	14.6%	13.4%	32.0%	19.0%
Switzerland	10.1%	6.1%	3.6%	4.0%	6.0%
Belgium	6.3%	4.3%	8.0%	3.1%	5.6%
Germany	1.2%	3.7%	2.2%	3.5%	2.6%
United Kingdom	1.6%	0.0%	0.8%	1.4%	0.9%
Others	2.8%	4.0%	4.9%	4.0%	3.9%

% TOURISTS BY QUARTER OF TRIP

■ France ■ Others



Who do they come with?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	7.4%	5.9%	6.4%	7.1%	6.7%
Only with partner	64.8%	48.5%	35.0%	41.0%	47.6%
Only with children (< 13 years old)	2.6%	5.7%	11.1%	9.6%	7.1%
Partner + children (< 13 years old)	3.2%	4.9%	7.2%	8.5%	5.8%
Other relatives	3.2%	7.8%	7.7%	8.6%	6.7%
Friends	7.4%	8.6%	6.1%	6.2%	7.2%
Work colleagues	0.4%	0.8%	0.2%	0.2%	0.4%
Organized trip	0.3%	0.9%	0.0%	0.4%	0.4%
Other combinations ⁽¹⁾	10.7%	16.9%	26.4%	18.3%	18.1%

(1) Different situations have been isolated

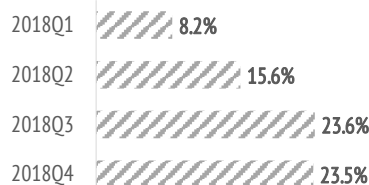
Tourists with children	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Between 0 and 2 years old	0.5%	1.5%	1.4%	1.2%	1.2%
- Between 3 and 12 years old	7.2%	13.2%	20.5%	20.8%	15.1%
- Between 0 - 2 and 3-12 years	0.5%	0.9%	1.7%	1.5%	1.1%

Tourists without children	2018Q1	2018Q2	2018Q3	2018Q4	2018
	91.8%	84.4%	76.4%	76.5%	82.6%

Group composition:	2018Q1	2018Q2	2018Q3	2018Q4	2018
- 1 person	10.2%	9.7%	6.8%	9.4%	9.0%
- 2 people	71.7%	60.0%	45.9%	45.3%	56.3%
- 3 people	6.3%	11.4%	18.0%	12.6%	12.1%
- 4 or 5 people	10.4%	15.2%	25.6%	28.6%	19.4%
- 6 or more people	1.4%	3.7%	3.7%	4.1%	3.2%
Average group size:	2.27	2.55	2.84	2.93	2.63



17.4% of French travel with children.



Who are they?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	47.4%	49.8%	46.6%	48.6%	48.1%
Women	52.6%	50.2%	53.4%	51.4%	51.9%
Age					
Average age (tourist > 15 years old)	51.8	48.9	42.9	48.6	48.0
Standard deviation	15.4	15.4	14.0	14.1	15.2
Age range (> 15 years old)					
16 - 24 years old	1.3%	6.2%	11.7%	3.7%	5.9%
25 - 30 years old	12.3%	10.9%	11.2%	9.1%	11.0%
31 - 45 years old	19.9%	23.0%	33.7%	31.0%	26.6%
46 - 60 years old	30.4%	32.4%	32.3%	34.6%	32.3%
Over 60 years old	36.1%	27.5%	11.1%	21.6%	24.2%
Occupation					
Salaried worker	46.0%	56.8%	64.1%	59.8%	56.6%
Self-employed	9.6%	9.5%	9.6%	8.3%	9.3%
Unemployed	2.5%	0.4%	0.4%	0.4%	0.9%
Business owner	5.4%	5.9%	8.1%	6.0%	6.4%
Student	2.1%	3.1%	5.9%	1.9%	3.3%
Retired	32.6%	24.0%	11.7%	21.4%	22.4%
Unpaid domestic work	0.5%	0.0%	0.0%	0.1%	0.1%
Others	1.3%	0.3%	0.2%	2.0%	0.9%
Annual household income level					
Less than €25,000	13.5%	17.1%	15.1%	13.2%	14.9%
€25,000 - €49,999	43.7%	42.3%	40.9%	41.3%	42.1%
€50,000 - €74,999	24.1%	30.1%	32.3%	25.7%	28.2%
More than €74,999	18.7%	10.5%	11.6%	19.8%	14.8%
Education level					
No studies	0.5%	1.2%	0.5%	1.3%	0.8%
Primary education	3.0%	1.6%	0.9%	0.8%	1.6%
Secondary education	24.3%	26.5%	23.4%	17.2%	23.2%
Higher education	72.2%	70.7%	75.1%	80.8%	74.3%



AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999

● 2018Q1 ● 2018Q2 ● 2018Q3 ● 2018Q4



% SALARIED WORKED TOURISTS



Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.