

Tourist profile trend (2017)

FRANCE

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	367,038	455,109	540,948	583,557	574,837
Tourist arrivals (> 16 years old)	312,932	383,872	457,716	498,461	489,605
Average daily expenditure (€)	128.91	132.67	131.71	134.77	134.85
. in their place of residence	95.83	97.85	99.01	101.42	102.14
. in the Canary Islands	33.08	34.82	32.70	33.34	32.71
Average length of stay	10.13	8.94	8.87	8.86	8.60
Turnover per tourist (€)	1,133	1,078	1,072	1,115	1,086
Total turnover (€m)	416	491	580	651	624
Tourist arrivals: year on year change	--	24.0%	18.9%	7.9%	-1.5%
Turnover: year on year change	--	18.0%	18.1%	12.2%	-4.1%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	17.9%	14.6%	12.4%	14.6%	12.3%
- Additional accommodation expenses	4.9%	4.6%	4.7%	4.5%	4.0%
Transport:					
- Public transport	14.9%	13.3%	12.9%	13.0%	11.9%
- Taxi	14.1%	11.6%	14.6%	15.3%	13.5%
- Car rental	31.1%	32.9%	30.8%	32.8%	29.1%
Food and drink:					
- Food purchases at supermarkets	48.2%	43.0%	37.8%	39.5%	37.6%
- Restaurants	46.8%	47.5%	49.3%	49.0%	47.9%
Souvenirs:	62.4%	67.0%	64.1%	61.7%	62.0%
Leisure:					
- Organized excursions	24.6%	27.4%	29.0%	26.3%	28.6%
- Leisure, amusement	9.3%	11.6%	10.9%	10.9%	8.2%
- Trip to other islands	4.1%	4.4%	3.2%	3.5%	2.4%
- Sporting activities	8.6%	8.5%	8.4%	10.9%	7.4%
- Cultural activities	8.6%	7.4%	8.4%	8.7%	7.8%
- Discos and disco-pubs	5.4%	4.2%	4.5%	5.6%	3.2%
Others:					
- Wellness	8.7%	8.0%	7.8%	8.3%	6.8%
- Medical expenses	4.6%	3.5%	3.1%	3.3%	2.4%
- Other expenses	11.0%	8.8%	8.4%	7.5%	8.8%

2017



-1%
TOURISTS
574,837



-3%
TRAVEL EXPENSES
€1,086



-4%
TURNOVER
€624 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	9.9%	9.8%	8.1%	6.0%	6.4%
Flight and accommodation (room only)	17.2%	14.8%	16.1%	15.0%	17.1%
Flight and accommodation (B&B)	5.7%	4.6%	3.9%	5.9%	5.3%
Flight and accommodation (half board)	17.8%	17.8%	14.2%	17.6%	14.2%
Flight and accommodation (full board)	9.9%	8.7%	10.3%	9.7%	11.7%
Flight and accommodation (all inclusive)	39.5%	44.3%	47.5%	45.8%	45.3%
<u>% Tourists using low-cost airlines</u>	51.2%	56.9%	65.3%	65.2%	68.0%
<u>Other expenses in their place of residence:</u>					
- Car rental	26.4%	24.4%	23.8%	25.4%	26.0%
- Sporting activities	8.7%	7.3%	8.0%	10.8%	9.6%
- Excursions	16.6%	15.7%	14.9%	15.3%	19.4%
- Trip to other islands	1.8%	1.1%	1.6%	2.0%	1.8%

How do they book?



	2013	2014	2015	2016	2017
Accommodation booking					
Tour Operator	31.6%	36.6%	34.3%	32.1%	35.1%
- Tour Operator's website	74.5%	80.1%	80.7%	77.4%	80.2%
Accommodation	18.1%	14.2%	13.5%	17.3%	13.0%
- Accommodation's website	82.3%	85.4%	85.5%	89.2%	90.4%
Travel agency (High street)	24.2%	22.6%	24.4%	28.1%	25.7%
Online Travel Agency (OTA)	21.0%	22.1%	22.9%	19.9%	22.8%
No need to book accommodation	5.1%	4.6%	4.8%	2.7%	3.5%
Flight booking					
Tour Operator	35.0%	36.8%	37.1%	34.2%	36.9%
- Tour Operator's website	74.2%	77.2%	77.4%	76.7%	75.9%
Airline	25.4%	22.1%	22.3%	24.4%	23.3%
- Airline's website	97.1%	98.9%	97.4%	97.2%	98.3%
Travel agency (High street)	24.0%	23.4%	25.1%	28.0%	25.3%
Online Travel Agency (OTA)	15.6%	17.7%	15.5%	13.3%	14.6%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.1%	0.4%	0.4%	0.7%	0.4%
Between 2 and 7 days	8.7%	10.5%	7.0%	7.5%	5.9%
Between 8 and 15 days	13.2%	11.5%	11.6%	8.4%	7.2%
Between 16 and 30 days	19.3%	18.3%	14.6%	16.3%	15.4%
Between 31 and 90 days	34.3%	33.6%	37.3%	35.5%	36.9%
More than 90 days	24.4%	25.8%	29.1%	31.6%	34.1%

Who are they?



	2013	2014	2015	2016	2017
Gender					
Men	50.7%	51.9%	47.6%	50.3%	48.7%
Women	49.3%	48.1%	52.4%	49.7%	51.3%
Age					
Average age (tourists > 16 years old)	43.2	44.0	45.2	46.6	47.1
Standard deviation	13.8	14.2	14.0	14.5	14.7
Age range (> 16 years old)					
16-24 years old	7.1%	8.2%	6.6%	6.1%	7.6%
25-30 years old	14.9%	13.6%	12.7%	11.0%	9.6%
31-45 years old	35.9%	33.1%	32.2%	30.8%	28.6%
46-60 years old	29.6%	32.2%	33.1%	32.6%	33.4%
Over 60 years old	12.5%	12.9%	15.3%	19.4%	20.7%
Occupation					
Business owner or self-employed	19.8%	16.5%	13.3%	15.8%	15.9%
Upper/Middle management employee	50.9%	55.6%	56.6%	52.9%	51.2%
Auxiliary level employee	10.9%	8.4%	9.2%	7.8%	6.9%
Students	3.7%	4.7%	4.0%	3.2%	5.0%
Retired	13.1%	13.2%	15.1%	19.0%	19.9%
Unemployed / unpaid dom. work	1.5%	1.6%	1.8%	1.3%	1.2%
Annual household income level					
€12,000 - €24,000	19.9%	17.3%	16.0%	15.2%	14.8%
€24,001 - €36,000	18.8%	20.9%	23.3%	21.7%	23.0%
€36,001 - €48,000	22.4%	21.1%	19.1%	20.5%	21.1%
€48,001 - €60,000	15.7%	16.2%	17.0%	16.8%	15.0%
€60,001 - €72,000	8.6%	7.0%	8.7%	7.7%	8.4%
€72,001 - €84,000	5.7%	4.8%	4.0%	5.2%	5.8%
More than €84,000	8.8%	12.8%	11.9%	13.0%	12.0%

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FRANCE

Which island do they choose?

	2013	2014	2015	2016	2017
- Lanzarote	62,440	75,683	116,607	129,156	118,370
- Fuerteventura	86,403	83,417	103,746	114,823	100,419
- Gran Canaria	36,148	54,780	73,511	86,135	93,325
- Tenerife	124,104	161,943	156,788	155,759	161,706
- La Palma	3,500	4,238	4,766	9,500	14,002

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	20.0%	19.9%	25.6%	26.1%	24.3%
- Fuerteventura	27.6%	21.9%	22.8%	23.2%	20.6%
- Gran Canaria	11.6%	14.4%	16.1%	17.4%	19.1%
- Tenerife	39.7%	42.6%	34.4%	31.4%	33.1%
- La Palma	1.1%	1.1%	1.0%	1.9%	2.9%

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	8.3%	8.4%	7.9%	6.8%	6.0%
4* Hotel	47.6%	46.5%	46.8%	45.8%	46.8%
1-2-3* Hotel	15.2%	17.1%	16.3%	22.2%	19.0%
Apartment	24.7%	22.8%	25.1%	22.6%	24.7%
Property (privately-owned, friends, family)	3.1%	3.7%	2.9%	1.8%	1.9%
Others	1.0%	1.6%	1.0%	0.8%	1.6%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	91.1%	92.1%	91.8%	92.7%	92.3%
Scenery	31.6%	36.0%	34.6%	35.3%	40.6%
Tranquillity/rest/relaxation	33.2%	33.0%	32.1%	30.0%	31.3%
Beaches	33.0%	28.7%	29.5%	32.1%	30.4%
Visiting new places	21.0%	21.4%	22.3%	21.8%	20.3%
Price	19.5%	22.6%	21.9%	18.0%	18.8%
Security	6.8%	6.4%	10.9%	14.2%	12.2%
Quality of the environment	6.4%	6.8%	5.9%	5.6%	7.7%
Active tourism	6.0%	7.0%	8.4%	9.3%	7.7%
Suitable destination for children	2.9%	4.7%	4.5%	4.1%	4.0%
Nautical activities	6.3%	5.3%	4.3%	5.2%	3.9%
Ease of travel	3.8%	4.0%	3.5%	3.3%	2.7%
Nightlife/fun	4.0%	3.5%	2.4%	2.2%	2.0%
Rural tourism	1.5%	2.3%	2.0%	1.7%	1.8%
Culture	1.9%	1.2%	1.7%	2.6%	1.5%
Theme parks	1.2%	1.8%	1.5%	1.9%	1.5%

* Multi-choice question

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	11.2%	8.1%	7.2%	6.1%	6.3%
Only with partner	45.5%	43.8%	49.1%	46.7%	42.4%
Only with children (under the age of 13)	1.9%	2.0%	1.8%	1.8%	2.6%
Partner + children (under the age of 13)	14.3%	17.5%	15.8%	15.7%	15.4%
Other relatives	2.9%	4.3%	2.9%	2.8%	4.5%
Friends	7.9%	6.6%	4.7%	5.8%	5.9%
Work colleagues	0.1%	0.2%	0.4%	0.2%	0.1%
Other combinations ⁽¹⁾	16.2%	17.6%	18.1%	20.9%	22.9%

* Multi-choice question (different situations have been isolated)

How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	91.3%	93.1%	91.2%	94.5%	93.4%
Average rating (scale 1-10)	8.65	8.72	8.69	8.81	8.87

How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	49.0%	44.8%	43.8%	50.5%	50.3%
At least 10 previous visits	5.4%	5.8%	3.8%	5.8%	6.1%

Where does the flight come from?

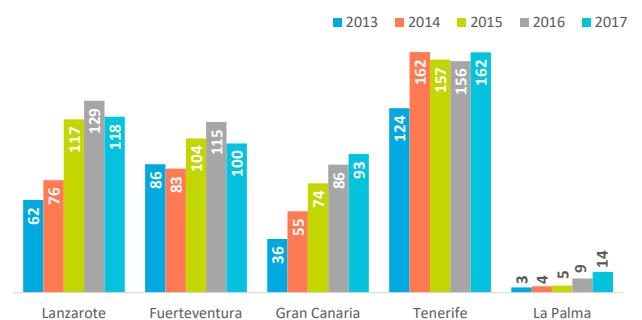
Tourists (> 16 years old)	2013	2014	2015	2016	2017
France	26.1%	55.5%	64.1%	44.8%	59.2%
Spanish Mainland	46.0%	26.9%	17.2%	26.8%	23.8%
Switzerland	7.1%	3.7%	4.3%	8.5%	6.5%
Belgium	5.6%	6.9%	6.2%	9.6%	4.6%
Germany	4.6%	2.2%	2.5%	2.9%	1.9%
United Kingdom	0.4%	0.5%	0.8%	0.6%	0.4%
Netherlands	0.0%	0.2%	0.2%	0.0%	0.1%
Sweden	0.0%	0.3%	0.0%	0.0%	0.1%
Denmark	0.0%	0.0%	0.0%	0.0%	0.1%
Others	10.2%	3.8%	4.8%	6.7%	3.3%

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	42.3%	37.2%	36.7%	42.9%	43.0%
Recommendation by friends/relatives	37.3%	37.5%	35.1%	34.5%	35.0%
The Canary Islands television channel	0.0%	0.4%	0.5%	0.2%	0.1%
Other television or radio channels	1.6%	1.7%	1.0%	1.8%	2.4%
Information in press/magazines/books	7.9%	7.9%	6.2%	4.8%	7.0%
Attendance at a tourism fair	0.6%	0.6%	0.6%	1.2%	0.8%
Tour Operator's brochure or catalogue	15.6%	16.4%	17.7%	16.6%	15.4%
Recommendation by Travel Agency	13.5%	14.6%	16.5%	16.8%	15.3%
Information obtained via the Internet	29.2%	32.6%	31.8%	26.8%	29.3%
Senior Tourism programme	0.2%	0.1%	0.2%	0.0%	0.2%
Others	6.2%	7.3%	4.9%	4.6%	4.6%

* Multi-choice question

Tourist arrivals by islands (thousands)



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.