

Tourist profile trend (2016)

France: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	55,363	70,909	78,961	96,457	95,343
Average daily expenditure (€)	132.35	137.58	142.63	128.84	137.13
. in their place of residence	93.52	100.19	106.72	92.76	105.01
. in the Canary Islands	38.83	37.39	35.91	36.08	32.12
Average length of stay	9.27	9.85	8.57	9.06	7.98
Turnover per tourist (€)	1,117	1,163	1,135	1,031	1,036
Total turnover (> 16 years old) (€m)	61.8	82.5	89.6	99.5	98.8
Share of total turnover	21.6%	23.3%	21.7%	20.3%	17.8%
Share of total tourist	20.6%	22.7%	20.6%	21.1%	19.1%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	57.15	72.75	60.49	64.22	42.38
- Accommodation	51.50	68.82	55.79	58.02	39.21
- Additional accommodation expenses	5.66	3.92	4.70	6.19	3.17
Transport:	29.56	38.59	40.80	31.77	28.87
- Public transport	3.50	6.71	8.81	6.90	4.99
- Taxi	5.12	4.40	2.47	2.78	4.28
- Car rental	20.94	27.47	29.53	22.09	19.60
Food and drink:	114.46	105.76	104.22	108.30	85.17
- Food purchases at supermarkets	49.74	44.25	41.92	45.14	23.31
- Restaurants	64.72	61.50	62.30	63.16	61.87
Souvenirs:	71.57	70.47	60.99	59.57	44.40
Leisure:	50.81	44.79	38.54	43.16	37.49
- Organized excursions	25.69	22.25	19.39	21.65	17.48
- Leisure, amusement	7.30	4.94	5.20	4.93	6.54
- Trip to other islands	2.27	1.64	2.01	1.23	0.86
- Sporting activities	4.78	6.52	5.67	7.65	6.99
- Cultural activities	4.85	5.78	2.96	4.46	2.94
- Discos and disco-pubs	5.92	3.67	3.31	3.23	2.69
Others:	19.73	7.98	9.75	19.36	11.90
- Wellness	3.33	3.21	3.85	6.18	4.57
- Medical expenses	1.54	0.90	1.20	0.34	1.16
- Other expenses	14.86	3.87	4.70	12.84	6.17

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.4%	0.0%	0.3%	0.9%	0.6%
Between 2 and 7 days	12.0%	15.4%	9.7%	7.3%	5.8%
Between 8 and 15 days	12.5%	7.1%	11.5%	12.8%	5.4%
Between 16 and 30 days	19.5%	15.5%	16.3%	15.6%	17.0%
Between 31 and 90 days	36.6%	37.4%	35.1%	37.7%	36.9%
More than 90 days	19.0%	24.5%	27.1%	25.7%	34.3%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	10.1%	11.9%	9.5%	10.7%	5.5%
Flight and accommodation (room only)	16.0%	16.6%	14.5%	21.9%	17.2%
Flight and accommodation (B&B)	9.9%	5.3%	5.6%	7.1%	7.6%
Flight and accommodation (half board)	19.9%	16.8%	19.0%	14.0%	16.8%
Flight and accommodation (full board)	6.1%	12.1%	9.7%	11.6%	8.6%
Flight and accommodation (all inclusive)	38.0%	37.4%	41.7%	34.7%	44.3%
% Tourists using low-cost airlines	53.8%	51.4%	59.4%	71.5%	65.2%
Other expenses in their place of residence:					
- Car rental	21.8%	30.6%	25.9%	31.2%	29.7%
- Sporting activities	3.7%	14.5%	9.5%	8.5%	10.4%
- Excursions	12.2%	23.8%	13.6%	14.5%	18.0%
- Trip to other islands	0.5%	1.4%	0.7%	3.0%	1.1%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	31.6%	25.6%	36.5%	25.0%	30.2%
- Tour Operator's website	72.8%	75.4%	64.7%	90.2%	78.2%
Accommodation	17.7%	19.7%	16.2%	17.5%	21.1%
- Accommodation's website	78.0%	87.7%	70.1%	96.1%	91.7%
Travel agency (High street)	24.4%	27.5%	23.4%	22.4%	22.7%
Online Travel Agency (OTA)	21.2%	18.1%	20.4%	29.0%	23.9%
No need to book accommodation	5.1%	9.1%	3.5%	6.1%	2.1%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	32.9%	34.4%	35.7%	30.4%	32.4%
- Tour Operator's website	72.4%	77.0%	64.9%	81.1%	78.5%
Airline	28.0%	28.0%	24.7%	32.1%	31.1%
- Airline's website	95.2%	98.3%	100.0%	96.5%	97.3%
Travel agency (High street)	28.2%	26.0%	24.7%	24.5%	23.5%
Online Travel Agency (OTA)	10.9%	11.6%	14.9%	13.0%	13.0%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	8.9%	11.8%	9.6%	11.9%	7.0%
4* Hotel	47.5%	42.5%	46.5%	42.9%	44.8%
1-2-3* Hotel	15.5%	14.3%	19.5%	11.9%	20.0%
Apartment	22.8%	24.2%	18.8%	28.3%	26.1%
Property (privately-owned, friends, family)	3.0%	5.3%	3.9%	4.4%	1.3%
Others	2.2%	1.9%	1.8%	0.6%	0.8%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	56.7%	49.9%	54.3%	50.6%	49.6%
Percentage of women	43.3%	50.1%	45.7%	49.4%	50.4%
Age					
Average age (tourists > 16 years old)	44.2	44.1	43.6	46.9	46.7
Standard deviation	14.9	13.7	13.5	15.1	12.4
Age range (> 16 years old)					
16-24 years old	8.4%	8.0%	7.2%	7.8%	3.2%
25-30 years old	19.5%	9.4%	10.6%	13.1%	6.1%
31-45 years old	27.9%	36.5%	40.9%	23.3%	40.5%
46-60 years old	25.8%	31.9%	28.8%	33.7%	33.9%
Over 60 years old	18.5%	14.3%	12.5%	22.0%	16.2%
Occupation					
Business owner or self-employed	22.4%	22.6%	20.5%	14.0%	20.4%
Upper/Middle management employee	43.7%	52.8%	57.6%	48.2%	55.8%
Auxiliary level employee	10.4%	9.8%	5.6%	7.5%	6.0%
Students	3.5%	1.8%	3.7%	5.1%	1.4%
Retired	18.6%	10.7%	11.1%	21.1%	15.7%
Unemployed / unpaid dom. work	1.4%	2.2%	1.5%	4.0%	0.6%
Annual household income level					
€12,000 - €24,000	22.1%	21.9%	16.4%	16.1%	11.4%
€24,001 - €36,000	18.2%	13.0%	16.4%	19.7%	19.0%
€36,001 - €48,000	20.1%	25.4%	18.7%	19.6%	24.0%
€48,001 - €60,000	15.7%	13.9%	21.0%	18.1%	16.3%
€60,001 - €72,000	8.8%	9.7%	7.0%	9.0%	9.2%
€72,001 - €84,000	5.4%	5.3%	6.1%	4.7%	7.2%
More than €84,000	9.6%	10.8%	14.6%	12.8%	12.8%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

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Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	8,712	16,831	14,617	24,221	24,075
- Fuerteventura	12,917	15,229	14,963	18,654	18,541
- Gran Canaria	7,977	9,808	12,170	16,095	17,348
- Tenerife	24,639	28,324	35,980	35,661	33,057
- La Palma	393	573	670	1,171	1,701

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	15.9%	23.8%	18.6%	25.3%	25.4%
- Fuerteventura	23.6%	21.5%	19.1%	19.5%	19.6%
- Gran Canaria	14.6%	13.9%	15.5%	16.8%	18.3%
- Tenerife	45.1%	40.0%	45.9%	37.2%	34.9%
- La Palma	0.7%	0.8%	0.9%	1.2%	1.8%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	9.1%	12.7%	7.8%	7.3%	3.5%
Only with partner	54.2%	46.1%	33.7%	53.2%	35.5%
Only with children (under the age of 13)	0.9%	0.8%	2.9%	1.6%	3.6%
Partner + children (under the age of 13)	11.4%	8.7%	25.3%	12.0%	24.7%
Other relatives	1.2%	3.1%	6.6%	3.9%	5.2%
Friends	8.1%	8.1%	6.2%	3.0%	3.9%
Work colleagues	0.4%	0.1%	0.1%	0.0%	0.0%
Other combinations ⁽¹⁾	14.8%	20.4%	17.4%	19.0%	23.5%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	93.4%	93.4%	94.7%	93.8%	96.5%
Average rating (scale 1-10)	8.90	8.61	8.88	8.88	8.86

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	51.2%	63.8%	48.1%	50.6%	57.3%
In love (at least 10 previous visits)	8.4%	8.6%	7.7%	4.9%	6.2%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Spanish Mainland	35.6%	47.2%	34.1%	23.5%	36.9%
France	45.4%	19.8%	48.0%	61.4%	35.6%
Belgium	5.2%	3.4%	8.0%	5.9%	8.8%
Switzerland	2.9%	8.9%	4.4%	5.9%	6.3%
Germany	2.8%	6.7%	0.0%	0.5%	3.3%
United Kingdom	0.2%	0.7%	0.0%	0.3%	0.5%
Italy	0.0%	0.0%	0.3%	0.0%	0.2%
Austria	0.0%	0.0%	0.0%	0.3%	0.0%
Netherlands	0.3%	0.0%	0.9%	0.6%	0.0%
Ireland	0.4%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	91.9%	91.5%	92.2%	91.8%	96.0%
Scenery	32.8%	36.4%	33.6%	32.4%	37.0%
Beaches	31.5%	31.2%	28.1%	28.0%	33.8%
Tranquillity/rest/relaxation	33.5%	29.4%	25.8%	30.1%	26.1%
Visiting new places	15.1%	22.1%	18.0%	20.5%	20.4%
Price	23.7%	17.9%	17.7%	19.2%	15.3%
Security	5.0%	8.1%	10.5%	10.3%	15.3%
Active tourism	12.3%	6.9%	6.7%	9.0%	8.3%
Nautical activities	6.5%	2.8%	6.0%	4.8%	6.4%
Suitable destination for children	3.1%	1.7%	7.2%	3.8%	6.1%
Quality of the environment	6.9%	7.7%	9.1%	6.8%	5.0%
Theme parks	0.8%	0.2%	2.1%	1.8%	2.9%
Culture	0.9%	0.5%	1.2%	2.5%	2.6%
Ease of travel	4.4%	9.1%	5.7%	3.1%	1.7%
Security against natural catastrophes	0.5%	0.0%	0.4%	0.4%	1.6%
Rural tourism	1.0%	4.5%	1.8%	2.5%	1.6%

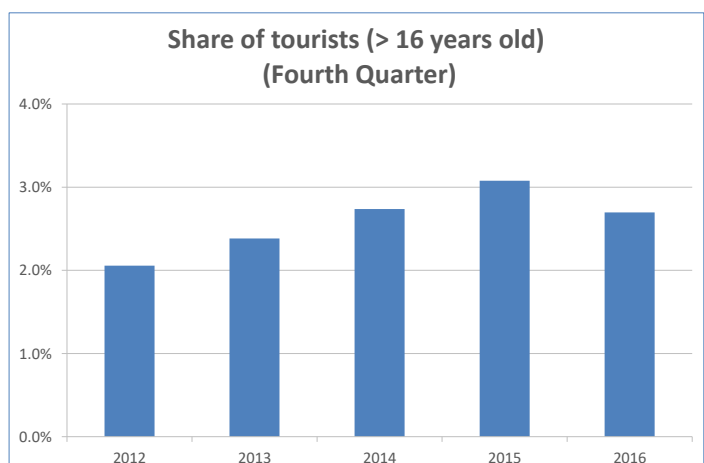
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	44.7%	58.0%	41.6%	44.4%	50.9%
Recommendation by friends or relatives	38.3%	27.9%	40.2%	40.2%	38.4%
The Canary Islands television channel	0.9%	0.0%	0.4%	0.4%	0.4%
Other television or radio channels	2.1%	0.8%	2.8%	0.5%	1.0%
Information in the press/magazines/books	4.4%	9.9%	9.6%	4.7%	4.3%
Attendance at a tourism fair	0.0%	0.0%	1.0%	0.4%	1.1%
Tour Operator's brochure or catalogue	15.9%	13.2%	12.8%	10.9%	10.4%
Recommendation by Travel Agency	14.6%	14.7%	18.2%	12.0%	13.5%
Information obtained via the Internet	27.9%	20.9%	26.3%	33.4%	23.5%
Senior Tourism programme	0.0%	0.1%	0.0%	0.3%	0.1%
Others	3.3%	3.9%	8.0%	7.4%	4.6%

* Multi-choice question



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.