

## Tourist profile trend (2017)

### FRANCE: Fourth Quarter



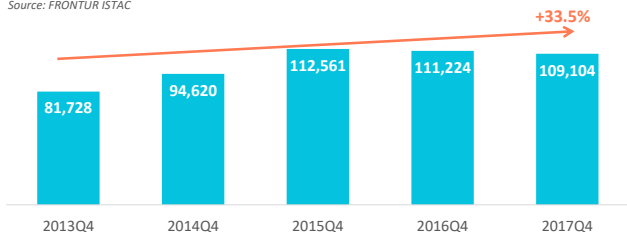
#### How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	81,728	94,620	112,561	111,224	109,104
Tourist arrivals (> 16 years old)	70,909	78,961	96,457	95,343	100,011
Average daily expenditure (€)	137.58	142.63	128.84	137.13	144.44
. in their place of residence	100.19	106.72	92.76	105.01	108.78
. in the Canary Islands	37.39	35.91	36.08	32.12	35.66
Average lenght of stay	9.85	8.57	9.06	7.98	7.92
Turnover per tourist (€)	1,163	1,135	1,031	1,036	1,073
Total turnover (€m)	95	107	116	115	117
Share of annual tourist	22.3%	20.8%	20.8%	19.1%	19.0%
Share of annual turnover	22.8%	21.9%	20.0%	17.7%	18.8%
<u>% tourists who pay in the Canary Islands:</u>					
<b>Accommodation:</b>					
- Accommodation	18.5%	15.7%	14.9%	17.0%	13.7%
- Additional accommodation expenses	5.1%	5.2%	6.7%	5.5%	3.9%
<b>Transport:</b>					
- Public transport	16.5%	16.8%	14.0%	11.2%	12.7%
- Taxi	14.9%	10.5%	13.9%	14.3%	11.3%
- Car rental	34.2%	35.7%	30.0%	33.8%	30.3%
<b>Food and drink:</b>					
- Food purchases at supermarkets	51.1%	43.5%	42.7%	37.7%	40.9%
- Restaurants	48.9%	48.6%	54.6%	50.9%	50.2%
<b>Souvenirs:</b>	57.9%	70.1%	59.8%	61.6%	61.8%
<b>Leisure:</b>					
- Organized excursions	21.5%	30.4%	22.7%	24.3%	25.8%
- Leisure, amusement	9.4%	13.6%	10.8%	13.7%	9.9%
- Trip to other islands	1.4%	3.3%	2.6%	1.9%	1.5%
- Sporting activities	11.5%	10.5%	6.4%	10.1%	6.9%
- Cultural activities	11.3%	9.5%	10.7%	8.5%	8.5%
- Discos and disco-pubs	5.3%	4.3%	5.8%	4.1%	3.1%
<b>Others:</b>					
- Wellness	9.6%	10.1%	8.6%	8.9%	5.4%
- Medical expenses	2.3%	2.8%	3.4%	3.9%	2.5%
- Other expenses	8.7%	7.2%	7.2%	7.0%	9.5%

#### TOURIST ARRIVALS

Source: FRONTUR ISTAC



#### What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	11.9%	9.5%	10.7%	5.5%	7.7%
Flight and accommodation (room only)	16.6%	14.5%	21.9%	17.2%	23.3%
Flight and accommodation (B&B)	5.3%	5.6%	7.1%	7.6%	3.8%
Flight and accommodation (half board)	16.8%	19.0%	14.0%	16.8%	12.0%
Flight and accommodation (full board)	12.1%	9.7%	11.6%	8.6%	10.9%
Flight and accommodation (all inclusive)	37.4%	41.7%	34.7%	44.3%	42.3%
<u>% Tourists using low-cost airlines</u>	51.4%	59.4%	71.5%	65.2%	65.4%
<u>Other expenses in their place of residence:</u>					
- Car rental	30.6%	25.9%	31.2%	29.7%	26.9%
- Sporting activities	14.5%	9.5%	8.5%	10.4%	7.5%
- Excursions	23.8%	13.6%	14.5%	18.0%	18.1%
- Trip to other islands	1.4%	0.7%	3.0%	1.1%	3.2%

#### How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
<b>Accommodation booking</b>					
<b>Tour Operator</b>	25.6%	36.5%	25.0%	30.2%	33.3%
- Tour Operator's website	75.4%	64.7%	90.2%	78.2%	73.8%
<b>Accommodation</b>	19.7%	16.2%	17.5%	21.1%	13.7%
- Accommodation's website	87.7%	70.1%	96.1%	91.7%	91.1%
<b>Travel agency (High street)</b>	27.5%	23.4%	22.4%	22.7%	24.2%
<b>Online Travel Agency (OTA)</b>	18.1%	20.4%	29.0%	23.9%	24.3%
<b>No need to book accommodation</b>	9.1%	3.5%	6.1%	2.1%	4.4%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
<b>Flight booking</b>					
<b>Tour Operator</b>	34.4%	35.7%	30.4%	32.4%	34.1%
- Tour Operator's website	77.0%	64.9%	81.1%	78.5%	70.9%
<b>Airline</b>	28.0%	24.7%	32.1%	31.1%	28.3%
- Airline's website	98.3%	100.0%	96.5%	97.3%	99.3%
<b>Travel agency (High street)</b>	26.0%	24.7%	24.5%	23.5%	23.9%
<b>Online Travel Agency (OTA)</b>	11.6%	14.9%	13.0%	13.0%	13.7%

#### How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.0%	0.3%	0.9%	0.6%	0.2%
Between 2 and 7 days	15.4%	9.7%	7.3%	5.8%	5.1%
Between 8 and 15 days	7.1%	11.5%	12.8%	5.4%	6.1%
Between 16 and 30 days	15.5%	16.3%	15.6%	17.0%	16.8%
Between 31 and 90 days	37.4%	35.1%	37.7%	36.9%	38.3%
More than 90 days	24.5%	27.1%	25.7%	34.3%	33.5%

#### Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
<b>Gender</b>					
Men	49.9%	54.3%	50.6%	49.6%	55.0%
Women	50.1%	45.7%	49.4%	50.4%	45.0%

#### Age

Average age (tourists > 16 years old)	44.1	43.6	46.9	46.7	48.4
Standard deviation	13.7	13.5	15.1	12.4	13.7

#### Age range (> 16 years old)

16-24 years old	8.0%	7.2%	7.8%	3.2%	3.9%
25-30 years old	9.4%	10.6%	13.1%	6.1%	7.0%
31-45 years old	36.5%	40.9%	23.3%	40.5%	32.7%
46-60 years old	31.9%	28.8%	33.7%	33.9%	35.0%
Over 60 years old	14.3%	12.5%	22.0%	16.2%	21.4%

#### Occupation

Business owner or self-employed	22.6%	20.5%	14.0%	20.4%	16.9%
Upper/Middle management employee	52.8%	57.6%	48.2%	55.8%	52.5%
Auxiliary level employee	9.8%	5.6%	7.5%	6.0%	5.7%
Students	1.8%	3.7%	5.1%	1.4%	3.7%
Retired	10.7%	11.1%	21.1%	15.7%	20.5%
Unemployed / unpaid dom. work	2.2%	1.5%	4.0%	0.6%	0.6%

#### Annual household income level

€12,000 - €24,000	21.9%	16.4%	16.1%	11.4%	14.6%
€24,001 - €36,000	13.0%	16.4%	19.7%	19.0%	23.3%
€36,001 - €48,000	25.4%	18.7%	19.6%	24.0%	17.6%
€48,001 - €60,000	13.9%	21.0%	18.1%	16.3%	17.8%
€60,001 - €72,000	9.7%	7.0%	9.0%	9.2%	12.0%
€72,001 - €84,000	5.3%	6.1%	4.7%	7.2%	4.6%
More than €84,000	10.8%	14.6%	12.8%	12.8%	10.1%

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#### Which island do they choose?



Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	16,831	14,617	24,221	24,075	23,465
- Fuerteventura	15,229	14,963	18,654	18,541	20,367
- Gran Canaria	9,808	12,170	16,095	17,348	17,235
- Tenerife	28,324	35,980	35,661	33,057	36,221
- La Palma	573	670	1,171	1,701	1,975

#### Where do they stay?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	11.8%	9.6%	11.9%	7.0%	5.3%
4* Hotel	42.5%	46.5%	42.9%	44.8%	43.3%
1-2-3* Hotel	14.3%	19.5%	11.9%	20.0%	16.5%
Apartment	24.2%	18.8%	28.3%	26.1%	30.5%
Property (privately-owned, friends, family)	5.3%	3.9%	4.4%	1.3%	1.5%
Others	1.9%	1.8%	0.6%	0.8%	2.8%

#### Who do they come with?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	12.7%	7.8%	7.3%	3.5%	6.7%
Only with partner	46.1%	33.7%	53.2%	35.5%	35.9%
Only with children (under the age of 13)	0.8%	2.9%	1.6%	3.6%	2.0%
Partner + children (under the age of 13)	8.7%	25.3%	12.0%	24.7%	18.9%
Other relatives	3.1%	6.6%	3.9%	5.2%	4.7%
Friends	8.1%	6.2%	3.0%	3.9%	5.7%
Work colleagues	0.1%	0.1%	0.0%	0.0%	0.1%
Other combinations <sup>(1)</sup>	20.4%	17.4%	19.0%	23.5%	25.9%

\* Multi-choise question (different situations have been isolated)

#### How do they rate the Canary Islands?



Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	93.4%	94.7%	93.8%	96.5%	94.7%
Average rating (scale 1-10)	8.61	8.88	8.88	8.86	8.93

#### How many are loyal to the Canary Islands?



Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	63.8%	48.1%	50.6%	57.3%	49.8%
At least 10 previous visits	8.6%	7.7%	4.9%	6.2%	6.9%

#### Where does the flight come from?



Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
France	19.8%	48.0%	61.4%	35.6%	46.6%
Spanish Mainland	47.2%	34.1%	23.5%	36.9%	34.4%
Switzerland	8.9%	4.4%	5.9%	6.3%	8.5%
Belgium	3.4%	8.0%	5.9%	8.8%	5.6%
Germany	6.7%	0.0%	0.5%	3.3%	0.9%
United Kingdom	0.7%	0.0%	0.3%	0.5%	0.2%
Austria	0.0%	0.0%	0.3%	0.0%	0.0%
Netherlands	0.0%	0.9%	0.6%	0.0%	0.0%
Italy	0.0%	0.3%	0.0%	0.2%	0.0%
Others	13.3%	4.3%	1.7%	8.5%	3.7%

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	23.8%	18.6%	25.3%	25.4%	23.6%
- Fuerteventura	21.5%	19.1%	19.5%	19.6%	20.5%
- Gran Canaria	13.9%	15.5%	16.8%	18.3%	17.4%
- Tenerife	40.0%	45.9%	37.2%	34.9%	36.5%
- La Palma	0.8%	0.9%	1.2%	1.8%	2.0%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	91.5%	92.2%	91.8%	96.0%	94.5%
Scenery	36.4%	33.6%	32.4%	37.0%	39.6%
Tranquillity/rest/relaxation	29.4%	25.8%	30.1%	26.1%	32.0%
Beaches	31.2%	28.1%	28.0%	33.8%	30.0%
Visiting new places	22.1%	18.0%	20.5%	20.4%	19.0%
Price	17.9%	17.7%	19.2%	15.3%	14.2%
Security	8.1%	10.5%	10.3%	15.3%	12.2%
Active tourism	6.9%	6.7%	9.0%	8.3%	8.6%
Quality of the environment	7.7%	9.1%	6.8%	5.0%	6.7%
Suitable destination for children	1.7%	7.2%	3.8%	6.1%	6.3%
Nautical activities	2.8%	6.0%	4.8%	6.4%	3.7%
Rural tourism	4.5%	1.8%	2.5%	1.6%	3.3%
Ease of travel	9.1%	5.7%	3.1%	1.7%	3.0%
Nightlife/fun	2.5%	2.8%	3.0%	0.9%	2.2%
Theme parks	0.2%	2.1%	1.8%	2.9%	2.0%
Shopping	4.8%	2.1%	0.7%	1.0%	1.6%

\* Multi-choise question

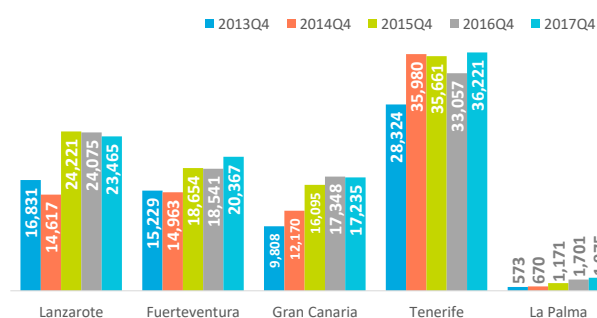
#### What did motivate them to come?



Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	58.0%	41.6%	44.4%	50.9%	44.1%
Recommendation by friends/relatives	27.9%	40.2%	40.2%	38.4%	37.4%
The Canary Islands television channel	0.0%	0.4%	0.4%	0.4%	0.0%
Other television or radio channels	0.8%	2.8%	0.5%	1.0%	1.1%
Information in press/magazines/books	9.9%	9.6%	4.7%	4.3%	6.8%
Attendance at a tourism fair	0.0%	1.0%	0.4%	1.1%	0.0%
Tour Operator's brochure or catalogue	13.2%	12.8%	10.9%	10.4%	14.3%
Recommendation by Travel Agency	14.7%	18.2%	12.0%	13.5%	15.9%
Information obtained via the Internet	20.9%	26.3%	33.4%	23.5%	30.1%
Senior Tourism programme	0.1%	0.0%	0.3%	0.1%	0.0%
Others	3.9%	8.0%	7.4%	4.6%	4.3%

\* Multi-choise question

#### Tourist arrivals by islands



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.