

Tourist profile trend (2016)

France: First Quarter

How many are they and how much do they spend?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|--------------------------------------|--------|--------|--------|---------|---------|
| Tourist arrivals (> 16 years old) | 70,188 | 75,626 | 93,412 | 106,672 | 119,336 |
| Average daily expenditure (€) | 133.89 | 137.72 | 138.49 | 142.71 | 141.71 |
| - in their place of residence | 99.98 | 102.65 | 97.61 | 105.22 | 105.28 |
| - in the Canary Islands | 33.91 | 35.06 | 40.88 | 37.48 | 36.43 |
| Average length of stay | 8.65 | 9.57 | 8.90 | 8.26 | 9.28 |
| Turnover per tourist (€) | 1,059 | 1,179 | 1,099 | 1,114 | 1,191 |
| Total turnover (> 16 years old) (€m) | 74.3 | 89.1 | 103 | 119 | 142 |
| Share of total turnover | 26.0% | 25.1% | 24.8% | 24.2% | 25.6% |
| Share of total tourist | 26.1% | 24.2% | 24.3% | 23.3% | 23.9% |

Expenditure in the Canary Islands per tourist and trip (€) (**)

| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|-------------------------------------|--------|--------|--------|--------|--------|
| Accommodation (**): | 36.01 | 39.64 | 74.66 | 47.67 | 46.89 |
| - Accommodation | 34.36 | 36.95 | 70.48 | 41.20 | 42.90 |
| - Additional accommodation expenses | 1.65 | 2.69 | 4.17 | 6.47 | 3.99 |
| Transport: | 30.03 | 35.18 | 36.19 | 36.50 | 39.42 |
| - Public transport | 3.38 | 5.76 | 3.69 | 4.67 | 6.98 |
| - Taxi | 4.63 | 3.91 | 4.42 | 3.73 | 4.53 |
| - Car rental | 22.03 | 25.51 | 28.08 | 28.10 | 27.91 |
| Food and drink: | 101.64 | 96.69 | 97.44 | 95.16 | 132.35 |
| - Food purchases at supermarkets | 39.82 | 36.15 | 37.81 | 39.75 | 58.82 |
| - Restaurants | 61.82 | 60.54 | 59.63 | 55.41 | 73.53 |
| Souvenirs: | 60.27 | 54.86 | 68.80 | 58.09 | 57.16 |
| Leisure: | 42.89 | 47.78 | 41.80 | 38.55 | 38.95 |
| - Organized excursions | 18.99 | 27.89 | 20.51 | 17.85 | 17.53 |
| - Leisure, amusement | 4.13 | 3.64 | 5.93 | 3.17 | 6.22 |
| - Trip to other islands | 4.65 | 2.61 | 3.28 | 1.68 | 1.76 |
| - Sporting activities | 10.14 | 7.10 | 6.19 | 9.02 | 6.57 |
| - Cultural activities | 2.30 | 3.21 | 4.25 | 2.28 | 2.38 |
| - Discos and disco-pubs | 2.67 | 3.32 | 1.63 | 4.54 | 4.49 |
| Others: | 20.16 | 26.35 | 20.36 | 21.35 | 10.07 |
| - Wellness | 2.05 | 11.99 | 4.37 | 7.59 | 3.80 |
| - Medical expenses | 0.22 | 2.22 | 1.85 | 1.83 | 0.31 |
| - Other expenses | 17.89 | 12.15 | 14.13 | 11.93 | 5.96 |

How far in advance do they book their trip?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.0% | 0.0% | 0.0% | 0.0% | 1.1% |
| Between 2 and 7 days | 9.1% | 8.2% | 10.5% | 5.6% | 9.0% |
| Between 8 and 15 days | 10.6% | 16.0% | 10.3% | 12.6% | 7.3% |
| Between 16 and 30 days | 18.4% | 16.5% | 18.8% | 16.7% | 21.1% |
| Between 31 and 90 days | 37.1% | 40.0% | 39.2% | 43.6% | 41.1% |
| More than 90 days | 24.8% | 19.3% | 21.3% | 21.5% | 20.5% |

What do they book at their place of residence?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---|--------|--------|--------|--------|--------|
| Flight only | 12.0% | 5.9% | 9.5% | 11.8% | 6.3% |
| Flight and accommodation (room only) | 13.0% | 17.2% | 16.4% | 14.7% | 14.5% |
| Flight and accommodation (B&B) | 3.4% | 5.4% | 2.8% | 2.8% | 7.7% |
| Flight and accommodation (half board) | 20.9% | 22.9% | 19.7% | 18.4% | 17.6% |
| Flight and accommodation (full board) | 13.0% | 13.4% | 11.0% | 7.4% | 12.4% |
| Flight and accommodation (all inclusive) | 37.6% | 35.1% | 40.6% | 44.9% | 41.5% |
| % Tourists using low-cost airlines | 44.2% | 47.1% | 49.7% | 63.3% | 70.9% |

Other expenses in their place of residence:

| | | | | | |
|-------------------------|-------|-------|-------|-------|-------|
| - Car rental | 21.8% | 20.5% | 26.5% | 21.3% | 25.8% |
| - Sporting activities | 6.2% | 7.5% | 4.8% | 8.3% | 8.5% |
| - Excursions | 14.1% | 12.0% | 17.1% | 13.9% | 12.9% |
| - Trip to other islands | 1.7% | 1.0% | 1.4% | 0.4% | 2.4% |

How do they book?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Accommodation booking | | | | | |
| Tour Operator | 44.9% | 38.7% | 33.2% | 36.1% | 33.2% |
| - Tour Operator's website | 67.3% | 73.1% | 74.1% | 79.9% | 72.9% |
| Accommodation | 8.5% | 16.4% | 15.0% | 11.9% | 18.1% |
| - Accommodation's website | 80.6% | 77.2% | 91.4% | 82.2% | 88.2% |
| Travel agency (High street) | 22.3% | 26.4% | 27.3% | 23.0% | 29.9% |
| Online Travel Agency (OTA) | 17.2% | 17.7% | 20.9% | 23.0% | 14.6% |
| No need to book accommodation | 7.1% | 0.8% | 3.6% | 6.1% | 4.2% |

Flight booking

| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|------------------------------------|--------|--------|--------|--------|--------|
| Tour Operator | 53.2% | 38.6% | 35.1% | 38.3% | 37.8% |
| - Tour Operator's website | 62.5% | 77.6% | 68.2% | 72.7% | 72.9% |
| Airline | 11.1% | 18.1% | 23.7% | 21.4% | 21.1% |
| - Airline's website | 100.0% | 98.6% | 98.3% | 100.0% | 97.8% |
| Travel agency (High street) | 20.8% | 28.5% | 26.7% | 23.8% | 30.3% |
| Online Travel Agency (OTA) | 14.9% | 14.8% | 14.5% | 16.5% | 10.7% |

Where do they stay?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---|--------|--------|--------|--------|--------|
| 5* Hotel | 5.3% | 6.4% | 8.7% | 7.4% | 8.1% |
| 4* Hotel | 41.6% | 58.5% | 45.3% | 49.0% | 42.2% |
| 1-2-3* Hotel | 22.6% | 12.8% | 18.2% | 15.3% | 25.1% |
| Apartment | 23.4% | 21.9% | 23.6% | 24.3% | 20.4% |
| Property (privately-owned, friends, family) | 5.5% | 0.2% | 2.5% | 2.6% | 3.1% |
| Others | 1.7% | 0.3% | 1.6% | 1.3% | 1.1% |

Who are they?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---------------------|--------|--------|--------|--------|--------|
| Gender | | | | | |
| Percentage of men | 51.8% | 60.0% | 52.5% | 49.5% | 58.6% |
| Percentage of women | 48.2% | 40.0% | 47.5% | 50.5% | 41.4% |

Age

| | | | | | |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 48.5 | 47.1 | 48.8 | 48.8 | 50.7 |
| Standard deviation | 14.4 | 14.9 | 13.4 | 13.4 | 16.0 |

Age range (> 16 years old)

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| 16-24 years old | 5.0% | 3.6% | 3.2% | 2.3% | 4.5% |
| 25-30 years old | 8.4% | 14.6% | 7.4% | 9.1% | 10.1% |
| 31-45 years old | 27.5% | 28.0% | 29.5% | 30.3% | 22.7% |
| 46-60 years old | 39.1% | 32.1% | 39.9% | 36.0% | 30.4% |
| Over 60 years old | 19.9% | 21.8% | 19.9% | 22.3% | 32.2% |

Occupation

| | | | | | |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed | 15.8% | 17.1% | 21.5% | 13.4% | 13.9% |
| Upper/Middle management employee | 49.0% | 45.8% | 50.1% | 50.1% | 44.5% |
| Auxiliary level employee | 6.3% | 10.3% | 4.8% | 11.1% | 3.7% |
| Students | 3.8% | 0.8% | 1.7% | 1.4% | 1.5% |
| Retired | 23.3% | 25.9% | 20.1% | 22.9% | 34.3% |
| Unemployed / unpaid dom. work | 1.9% | 0.0% | 1.8% | 1.2% | 2.2% |

Annual household income level

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 18.5% | 15.5% | 10.9% | 15.1% | 15.0% |
| €24,001 - €36,000 | 22.8% | 20.5% | 21.8% | 25.5% | 22.2% |
| €36,001 - €48,000 | 21.4% | 29.4% | 22.8% | 18.4% | 19.0% |
| €48,001 - €60,000 | 10.0% | 12.8% | 13.5% | 19.0% | 18.3% |
| €60,001 - €72,000 | 9.2% | 10.8% | 8.1% | 5.2% | 8.3% |
| €72,001 - €84,000 | 6.3% | 5.7% | 5.3% | 3.3% | 5.2% |
| More than €84,000 | 11.8% | 5.3% | 17.6% | 13.4% | 12.0% |

(*) 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.

Tourist profile trend (2016)

France: First Quarter

Which island do they choose?



| Tourists (> 16 years old) | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote | 6,734 | 11,554 | 19,948 | 23,498 | 33,871 |
| - Fuerteventura | 16,940 | 25,076 | 21,132 | 25,719 | 24,628 |
| - Gran Canaria | 10,343 | 7,485 | 10,699 | 14,826 | 17,833 |
| - Tenerife | 34,771 | 30,355 | 39,651 | 41,371 | 40,040 |
| - La Palma | 614 | 1,144 | 571 | 847 | 1,663 |

| Share (%) | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote | 9.7% | 15.3% | 21.7% | 22.1% | 28.7% |
| - Fuerteventura | 24.4% | 33.2% | 23.0% | 24.2% | 20.9% |
| - Gran Canaria | 14.9% | 9.9% | 11.6% | 14.0% | 15.1% |
| - Tenerife | 50.1% | 40.1% | 43.1% | 38.9% | 33.9% |
| - La Palma | 0.9% | 1.5% | 0.6% | 0.8% | 1.4% |

Who do they come with?



| | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied | 5.7% | 13.3% | 8.0% | 9.1% | 7.8% |
| Only with partner | 50.2% | 70.0% | 50.4% | 57.6% | 62.1% |
| Only with children (under the age of 13) | 1.1% | 0.0% | 0.2% | 1.5% | 0.7% |
| Partner + children (under the age of 13) | 14.0% | 6.2% | 16.2% | 14.2% | 10.4% |
| Other relatives | 4.3% | 0.4% | 1.3% | 1.9% | 1.6% |
| Friends | 7.7% | 3.3% | 7.1% | 4.8% | 4.6% |
| Work colleagues | 0.0% | 0.2% | 0.0% | 0.8% | 0.5% |
| Other combinations ⁽¹⁾ | 17.1% | 6.5% | 16.9% | 10.0% | 12.2% |

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

How do they rate the destination?



| Impression of their stay | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 92.5% | 92.3% | 95.2% | 84.5% | 92.9% |
| Average rating (scale 1-10) | 8.58 | 8.57 | 8.78 | 8.37 | 8.84 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists | 56.6% | 51.5% | 54.5% | 52.2% | 57.5% |
| In love (at least 10 previous visits) | 9.8% | 6.2% | 7.7% | 5.0% | 7.7% |

Where does the flight come from?



| Ten main origin countries | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|---------------------------|--------|--------|--------|--------|--------|
| France | 55.1% | 41.7% | 58.0% | 67.2% | 53.8% |
| Spanish Mainland | 24.7% | 38.3% | 29.2% | 16.5% | 16.9% |
| Belgium | 7.5% | 2.1% | 6.2% | 4.6% | 10.4% |
| Switzerland | 6.5% | 12.4% | 2.0% | 3.1% | 9.1% |
| Germany | 1.2% | 0.0% | 1.5% | 2.6% | 2.2% |
| United Kingdom | 0.4% | 0.0% | 1.6% | 0.7% | 1.8% |
| Italy | 0.0% | 0.0% | 0.0% | 0.0% | 1.0% |
| Austria | 0.0% | 0.0% | 0.0% | 0.5% | 0.0% |
| Netherlands | 0.0% | 0.0% | 0.0% | 0.1% | 0.0% |
| Ireland | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Why do they choose the Canary Islands?



| Aspects influencing the choice | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun | 95.5% | 92.5% | 93.0% | 92.7% | 94.0% |
| Scenery | 34.1% | 34.3% | 33.9% | 33.4% | 33.4% |
| Tranquillity/rest/relaxation | 31.5% | 45.5% | 38.6% | 34.7% | 30.8% |
| Visiting new places | 21.0% | 17.8% | 19.8% | 18.7% | 21.5% |
| Beaches | 27.4% | 19.9% | 23.4% | 22.1% | 20.7% |
| Price | 17.6% | 16.7% | 21.4% | 21.9% | 20.0% |
| Security | 8.7% | 12.1% | 6.2% | 11.5% | 19.4% |
| Active tourism | 6.9% | 5.8% | 8.6% | 9.3% | 12.0% |
| Quality of the environment | 5.7% | 7.2% | 10.0% | 8.3% | 9.3% |
| Ease of travel | 3.1% | 3.6% | 4.3% | 3.4% | 5.6% |
| Nautical activities | 3.2% | 5.6% | 5.1% | 3.3% | 2.6% |
| Nightlife/fun | 2.5% | 4.4% | 0.9% | 1.6% | 2.4% |
| Rural tourism | 1.5% | 0.6% | 2.9% | 1.3% | 2.2% |
| Golf | 2.2% | 1.0% | 1.5% | 1.0% | 1.6% |
| Culture | 1.2% | 2.4% | 1.3% | 1.8% | 1.6% |
| Suitable destination for children | 3.3% | 0.0% | 3.9% | 3.3% | 1.5% |

* Multi-choice question

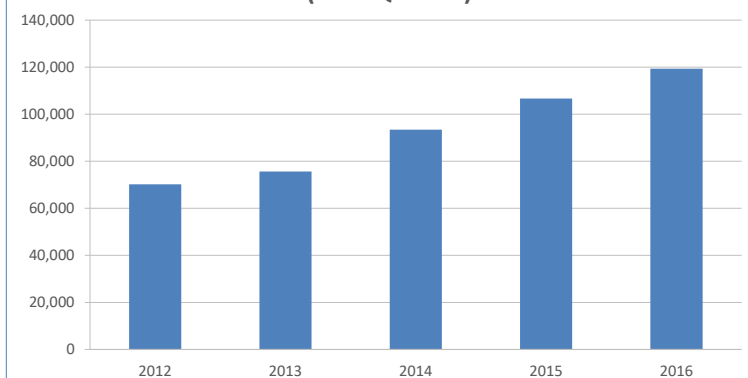
What did motivate them to come?



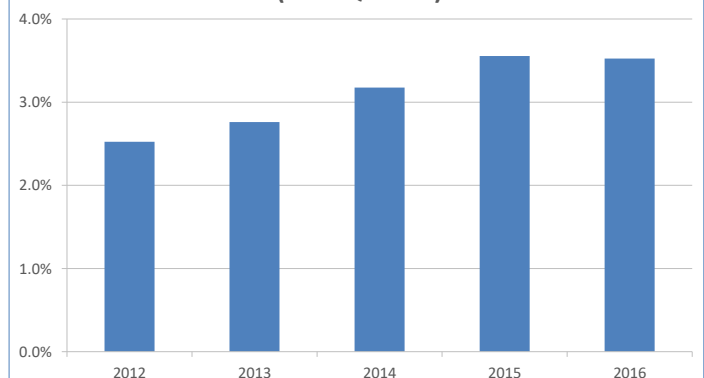
| Aspects motivating the choice | 2012Q1 | 2013Q1 | 2014Q1 | 2015Q1 | 2016Q1 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 49.8% | 44.2% | 45.1% | 43.7% | 44.9% |
| Recommendation by friends or relatives | 28.0% | 32.1% | 35.5% | 35.8% | 28.2% |
| The Canary Islands television channel | 0.1% | 0.0% | 0.3% | 0.5% | 0.0% |
| Other television or radio channels | 0.4% | 2.4% | 0.8% | 0.8% | 0.7% |
| Information in the press/magazines/books | 6.7% | 5.1% | 10.6% | 5.7% | 5.8% |
| Attendance at a tourism fair | 1.2% | 0.3% | 0.4% | 1.3% | 0.0% |
| Tour Operator's brochure or catalogue | 17.6% | 19.9% | 16.6% | 16.1% | 16.1% |
| Recommendation by Travel Agency | 15.4% | 13.8% | 9.5% | 16.4% | 18.5% |
| Information obtained via the Internet | 25.2% | 27.4% | 29.7% | 27.9% | 28.0% |
| Senior Tourism programme | 0.0% | 0.0% | 0.0% | 0.3% | 0.0% |
| Others | 5.8% | 9.2% | 6.2% | 3.8% | 4.7% |

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(First Quarter)



Share of tourists (> 16 years old)
(First Quarter)



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.