

# Tourist profile trend (2017)

## France: First Quarter

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	75,626	93,412	106,672	119,336	118,665
Average daily expenditure (€)	137.72	138.49	142.71	141.71	137.01
. in their place of residence	102.65	97.61	105.22	105.28	105.29
. in the Canary Islands	35.06	40.88	37.48	36.43	31.72
Average length of stay	9.57	8.90	8.26	9.28	8.59
Turnover per tourist (€)	1,179	1,099	1,114	1,191	1,090
Total turnover (> 16 years old) (€m)	89.1	103	119	142	129
Share of total turnover	25.1%	24.8%	24.2%	25.6%	--
Share of total tourist	24.2%	24.3%	23.3%	23.9%	--

Expenditure in the Canary Islands per tourist and trip (€) <sup>(*)</sup>					
<b>Accommodation (**):</b>	39.64	74.66	47.67	46.89	45.42
- Accommodation	36.95	70.48	41.20	42.90	42.77
- Additional accommodation expenses	2.69	4.17	6.47	3.99	2.65
<b>Transport:</b>	35.18	36.19	36.50	39.42	37.70
- Public transport	5.76	3.69	4.67	6.98	7.09
- Taxi	3.91	4.42	3.73	4.53	3.27
- Car rental	25.51	28.08	28.10	27.91	27.33
<b>Food and drink:</b>	96.69	97.44	95.16	132.35	83.22
- Food purchases at supermarkets	36.15	37.81	39.75	58.82	29.72
- Restaurants	60.54	59.63	55.41	73.53	53.50
<b>Souvenirs:</b>	54.86	68.80	58.09	57.16	58.42
<b>Leisure:</b>	47.78	41.80	38.55	38.95	34.09
- Organized excursions	27.89	20.51	17.85	17.53	18.64
- Leisure, amusement	3.64	5.93	3.17	6.22	3.56
- Trip to other islands	2.61	3.28	1.68	1.76	1.24
- Sporting activities	7.10	6.19	9.02	6.57	5.99
- Cultural activities	3.21	4.25	2.28	2.38	2.43
- Discos and disco-pubs	3.32	1.63	4.54	4.49	2.24
<b>Others:</b>	26.35	20.36	21.35	10.07	7.47
- Wellness	11.99	4.37	7.59	3.80	1.85
- Medical expenses	2.22	1.85	1.83	0.31	1.11
- Other expenses	12.15	14.13	11.93	5.96	4.51

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.0%	0.0%	0.0%	1.1%	0.7%
Between 2 and 7 days	8.2%	10.5%	5.6%	9.0%	4.9%
Between 8 and 15 days	16.0%	10.3%	12.6%	7.3%	8.3%
Between 16 and 30 days	16.5%	18.8%	16.7%	21.1%	14.3%
Between 31 and 90 days	40.0%	39.2%	43.6%	41.1%	41.5%
More than 90 days	19.3%	21.3%	21.5%	20.5%	30.3%

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	5.9%	9.5%	11.8%	6.3%	6.8%
Flight and accommodation (room only)	17.2%	16.4%	14.7%	14.5%	14.3%
Flight and accommodation (B&B)	5.4%	2.8%	2.8%	7.7%	5.4%
Flight and accommodation (half board)	22.9%	19.7%	18.4%	17.6%	14.8%
Flight and accommodation (full board)	13.4%	11.0%	7.4%	12.4%	13.1%
Flight and accommodation (all inclusive)	35.1%	40.6%	44.9%	41.5%	45.7%
<b>% Tourists using low-cost airlines</b>	47.1%	49.7%	63.3%	70.9%	73.2%
<b>Other expenses in their place of residence:</b>					
- Car rental	20.5%	26.5%	21.3%	25.8%	32.7%
- Sporting activities	7.5%	4.8%	8.3%	8.5%	7.2%
- Excursions	12.0%	17.1%	13.9%	12.9%	16.2%
- Trip to other islands	1.0%	1.4%	0.4%	2.4%	1.0%

### How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	38.7%	33.2%	36.1%	33.2%	33.0%
- Tour Operator's website	73.1%	74.1%	79.9%	72.9%	84.5%
<b>Accommodation</b>	16.4%	15.0%	11.9%	18.1%	15.8%
- Accommodation's website	77.2%	91.4%	82.2%	88.2%	94.1%
<b>Travel agency (High street)</b>	26.4%	27.3%	23.0%	29.9%	29.0%
<b>Online Travel Agency (OTA)</b>	17.7%	20.9%	23.0%	14.6%	19.6%
<b>No need to book accommodation</b>	0.8%	3.6%	6.1%	4.2%	2.6%

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Flight booking</b>					
<b>Tour Operator</b>	38.6%	35.1%	38.3%	37.8%	36.6%
- Tour Operator's website	77.6%	68.2%	72.7%	72.9%	75.6%
<b>Airline</b>	18.1%	23.7%	21.4%	21.1%	24.3%
- Airline's website	98.6%	98.3%	100.0%	97.8%	99.1%
<b>Travel agency (High street)</b>	28.5%	26.7%	23.8%	30.3%	26.5%
<b>Online Travel Agency (OTA)</b>	14.8%	14.5%	16.5%	10.7%	12.6%

### Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	6.4%	8.7%	7.4%	8.1%	5.4%
4* Hotel	58.5%	45.3%	49.0%	42.2%	44.6%
1-2-3* Hotel	12.8%	18.2%	15.3%	25.1%	18.2%
Apartment	21.9%	23.6%	24.3%	20.4%	28.0%
Property (privately-owned, friends, family)	0.2%	2.5%	2.6%	3.1%	2.5%
Others	0.3%	1.6%	1.3%	1.1%	1.3%

### Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Gender</b>					
Percentage of men	60.0%	52.5%	49.5%	58.6%	46.7%
Percentage of women	40.0%	47.5%	50.5%	41.4%	53.3%

Age					
Average age (tourists > 16 years old)	47.1	48.8	48.8	50.7	49.2
Standard deviation	14.9	13.4	13.4	16.0	13.9

Age range (> 16 years old)					
16-24 years old	3.6%	3.2%	2.3%	4.5%	4.7%
25-30 years old	14.6%	7.4%	9.1%	10.1%	7.8%
31-45 years old	28.0%	29.5%	30.3%	22.7%	27.5%
46-60 years old	32.1%	39.9%	36.0%	30.4%	37.1%
Over 60 years old	21.8%	19.9%	22.3%	32.2%	22.9%

Occupation					
Business owner or self-employed	17.1%	21.5%	13.4%	13.9%	22.9%
Upper/Middle management employee	45.8%	50.1%	50.1%	44.5%	45.4%
Auxiliary level employee	10.3%	4.8%	11.1%	3.7%	6.0%
Students	0.8%	1.7%	1.4%	1.5%	3.2%
Retired	25.9%	20.1%	22.9%	34.3%	21.8%
Unemployed / unpaid dom. work	0.0%	1.8%	1.2%	2.2%	0.8%

Annual household income level					
€12,000 - €24,000	15.5%	10.9%	15.1%	15.0%	11.3%
€24,001 - €36,000	20.5%	21.8%	25.5%	22.2%	22.5%
€36,001 - €48,000	29.4%	22.8%	18.4%	19.0%	19.7%
€48,001 - €60,000	12.8%	13.5%	19.0%	18.3%	14.6%
€60,001 - €72,000	10.8%	8.1%	5.2%	8.3%	9.1%
€72,001 - €84,000	5.7%	5.3%	3.3%	5.2%	7.9%
More than €84,000	5.3%	17.6%	13.4%	12.0%	14.9%

(\*) 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 (2017)

### France: First Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	11,554	19,948	23,498	33,871	30,211
- Fuerteventura	25,076	21,132	25,719	24,628	22,006
- Gran Canaria	7,485	10,699	14,826	17,833	20,967
- Tenerife	30,355	39,651	41,371	40,040	42,523
- La Palma	1,144	571	847	1,663	2,667

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	15.3%	21.7%	22.1%	28.7%	25.5%
- Fuerteventura	33.2%	23.0%	24.2%	20.9%	18.6%
- Gran Canaria	9.9%	11.6%	14.0%	15.1%	17.7%
- Tenerife	40.1%	43.1%	38.9%	33.9%	35.9%
- La Palma	1.5%	0.6%	0.8%	1.4%	2.3%

#### Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	13.3%	8.0%	9.1%	7.8%	5.6%
Only with partner	70.0%	50.4%	57.6%	62.1%	40.5%
Only with children (under the age of 13)	0.0%	0.2%	1.5%	0.7%	3.0%
Partner + children (under the age of 13)	6.2%	16.2%	14.2%	10.4%	15.1%
Other relatives	0.4%	1.3%	1.9%	1.6%	3.9%
Friends	3.3%	7.1%	4.8%	4.6%	6.2%
Work colleagues	0.2%	0.0%	0.8%	0.5%	0.0%
Other combinations <sup>(1)</sup>	6.5%	16.9%	10.0%	12.2%	25.7%

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

#### How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	92.3%	95.2%	84.5%	92.9%	93.4%
Average rating (scale 1-10)	8.57	8.78	8.37	8.84	9.01

#### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	51.5%	54.5%	52.2%	57.5%	56.4%
In love (at least 10 previous visits)	6.2%	7.7%	5.0%	7.7%	4.9%

#### Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
France	41.7%	58.0%	67.2%	53.8%	55.2%
Spanish Mainland	38.3%	29.2%	16.5%	16.9%	22.9%
Switzerland	12.4%	2.0%	3.1%	9.1%	6.8%
Belgium	2.1%	6.2%	4.6%	10.4%	5.7%
Germany	0.0%	1.5%	2.6%	2.2%	3.4%
United Kingdom	0.0%	1.6%	0.7%	1.8%	0.7%
Netherlands	0.0%	0.0%	0.1%	0.0%	0.5%
Denmark	0.0%	0.0%	0.0%	0.0%	0.3%
Ireland	0.0%	0.0%	0.0%	0.0%	0.1%
Austria	0.0%	0.0%	0.5%	0.0%	0.0%



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



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	92.5%	93.0%	92.7%	94.0%	92.4%
Scenery	34.3%	33.9%	33.4%	33.4%	43.3%
Tranquillity/rest/relaxation	45.5%	38.6%	34.7%	30.8%	33.7%
Beaches	19.9%	23.4%	22.1%	20.7%	22.6%
Price	16.7%	21.4%	21.9%	20.0%	18.8%
Visiting new places	17.8%	19.8%	18.7%	21.5%	18.1%
Security	12.1%	6.2%	11.5%	19.4%	13.8%
Quality of the environment	7.2%	10.0%	8.3%	9.3%	8.5%
Active tourism	5.8%	8.6%	9.3%	12.0%	7.8%
Ease of travel	3.6%	4.3%	3.4%	5.6%	3.5%
Suitable destination for children	0.0%	3.9%	3.3%	1.5%	3.4%
Rural tourism	0.6%	2.9%	1.3%	2.2%	2.5%
Nautical activities	5.6%	5.1%	3.3%	2.6%	2.1%
Nightlife/fun	4.4%	0.9%	1.6%	2.4%	2.1%
Shopping	0.5%	1.8%	1.4%	0.2%	1.5%
Culture	2.4%	1.3%	1.8%	1.6%	1.3%

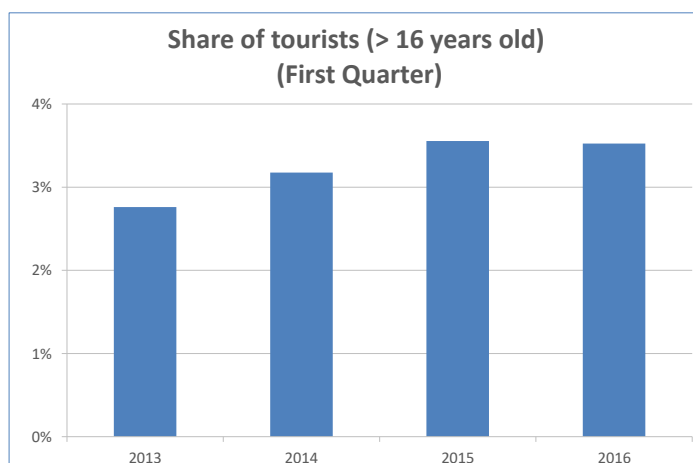
\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	44.2%	45.1%	43.7%	44.9%	47.5%
Recommendation by friends or relatives	32.1%	35.5%	35.8%	28.2%	32.3%
The Canary Islands television channel	0.0%	0.3%	0.5%	0.0%	0.1%
Other television or radio channels	2.4%	0.8%	0.8%	0.7%	3.2%
Information in the press/magazines/books	5.1%	10.6%	5.7%	5.8%	7.2%
Attendance at a tourism fair	0.3%	0.4%	1.3%	0.0%	1.1%
Tour Operator's brochure or catalogue	19.9%	16.6%	16.1%	16.1%	13.0%
Recommendation by Travel Agency	13.8%	9.5%	16.4%	18.5%	15.6%
Information obtained via the Internet	27.4%	29.7%	27.9%	28.0%	25.5%
Senior Tourism programme	0.0%	0.0%	0.3%	0.0%	0.0%
Others	9.2%	6.2%	3.8%	4.7%	6.6%

\* 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.