

# Tourist profile trend (2017)

## France: Second Quarter

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	78,580	106,016	127,217	144,095	135,704
Average daily expenditure (€)	121.52	128.57	121.52	129.22	127.22
. in their place of residence	92.40	97.05	93.64	96.92	93.20
. in the Canary Islands	29.12	31.52	27.89	32.29	34.03
Average length of stay	9.08	8.42	8.48	8.16	8.04
Turnover per tourist (€)	968	994	949	980	959
Total turnover (> 16 years old) (€m)	76.1	105	121	141	130
Share of total turnover	21.5%	25.5%	24.6%	25.4%	--
Share of total tourist	25.1%	27.6%	27.8%	28.9%	--

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

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Accommodation (**):</b>	39.70	44.44	31.55	43.61	44.81
- Accommodation	36.91	42.23	27.12	38.72	39.75
- Additional accommodation expenses	2.78	2.20	4.43	4.89	5.06
<b>Transport:</b>	27.75	25.29	25.10	23.63	22.76
- Public transport	6.34	4.49	5.15	2.74	3.77
- Taxi	5.15	2.34	3.16	2.47	4.04
- Car rental	16.26	18.45	16.80	18.42	14.95
<b>Food and drink:</b>	84.82	80.54	66.93	86.47	87.82
- Food purchases at supermarkets	39.73	32.07	26.15	31.36	25.24
- Restaurants	45.09	48.46	40.79	55.11	62.58
<b>Souvenirs:</b>	50.46	60.32	58.97	50.95	51.48
<b>Leisure:</b>	35.80	34.73	42.84	36.42	38.94
- Organized excursions	15.15	15.94	24.79	17.16	23.94
- Leisure, amusement	5.52	2.98	5.38	5.14	2.38
- Trip to other islands	3.32	2.90	3.18	1.28	1.69
- Sporting activities	4.45	6.44	3.71	5.70	4.91
- Cultural activities	4.11	2.32	4.12	3.39	3.14
- Discos and disco-pubs	3.26	4.16	1.65	3.75	2.88
<b>Others:</b>	14.95	8.04	7.72	11.96	11.12
- Wellness	2.70	3.72	4.06	4.34	4.42
- Medical expenses	1.01	0.43	0.50	0.94	1.05
- Other expenses	11.25	3.89	3.16	6.68	5.66

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.4%	0.6%	0.0%	0.9%	0.3%
Between 2 and 7 days	7.9%	7.5%	8.1%	6.3%	6.6%
Between 8 and 15 days	14.1%	10.9%	10.1%	11.6%	5.6%
Between 16 and 30 days	24.3%	17.1%	13.7%	13.9%	17.0%
Between 31 and 90 days	36.3%	37.8%	40.8%	35.1%	40.3%
More than 90 days	17.0%	26.1%	27.3%	32.2%	30.2%

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



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	10.8%	9.3%	6.2%	5.8%	6.8%
Flight and accommodation (room only)	17.5%	13.7%	14.2%	16.7%	15.8%
Flight and accommodation (B&B)	4.6%	5.4%	2.8%	4.9%	6.7%
Flight and accommodation (half board)	16.0%	17.7%	13.0%	16.9%	14.4%
Flight and accommodation (full board)	8.8%	8.6%	12.8%	7.7%	14.2%
Flight and accommodation (all inclusive)	42.3%	45.3%	51.0%	47.9%	42.1%
<b>% Tourists using low-cost airlines</b>	50.2%	54.9%	64.2%	65.2%	72.7%
<b>Other expenses in their place of residence:</b>					
- Car rental	27.9%	25.6%	25.4%	27.3%	25.4%
- Sporting activities	4.0%	7.2%	7.7%	9.3%	9.3%
- Excursions	9.7%	15.4%	14.9%	14.7%	18.8%
- Trip to other islands	1.5%	1.5%	2.0%	2.6%	2.1%

### How do they book?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Accommodation booking</b>					
<b>Tour Operator</b>	30.8%	38.5%	35.4%	32.4%	38.8%
- Tour Operator's website	67.0%	80.5%	77.2%	81.5%	75.0%
<b>Accommodation</b>	21.2%	14.8%	14.6%	16.1%	13.9%
- Accommodation's website	74.1%	88.3%	74.4%	91.3%	85.3%
<b>Travel agency (High street)</b>	24.2%	23.9%	27.2%	27.2%	21.8%
<b>Online Travel Agency (OTA)</b>	19.9%	19.6%	18.8%	22.0%	23.2%
<b>No need to book accommodation</b>	3.9%	3.2%	4.0%	2.3%	2.3%

### Flight booking

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Tour Operator</b>	35.2%	34.2%	37.4%	33.1%	40.8%
- Tour Operator's website	70.2%	76.6%	75.7%	75.2%	71.0%
<b>Airline</b>	24.7%	22.2%	22.1%	24.7%	23.0%
- Airline's website	98.9%	97.6%	96.2%	100.0%	99.3%
<b>Travel agency (High street)</b>	25.0%	26.6%	26.5%	26.6%	21.3%
<b>Online Travel Agency (OTA)</b>	15.1%	17.1%	14.0%	15.5%	14.9%

### Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	5.6%	6.0%	4.0%	8.5%	5.5%
4* Hotel	46.7%	48.1%	49.8%	44.9%	51.2%
1-2-3* Hotel	20.0%	17.1%	16.9%	23.4%	19.3%
Apartment	22.8%	25.1%	25.6%	21.0%	21.9%
Property (privately-owned, friends, family)	3.5%	2.6%	2.6%	1.4%	1.0%
Others	1.4%	1.0%	1.1%	0.9%	1.1%

### Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
<b>Gender</b>					
Percentage of men	44.0%	52.3%	45.0%	47.4%	50.0%
Percentage of women	56.0%	47.7%	55.0%	52.6%	50.0%

### Age

Average age (tourists > 16 years old)	44.1	46.3	46.2	46.0	48.2
Standard deviation	13.4	13.8	13.8	13.7	15.3

### Age range (> 16 years old)

16-24 years old	4.5%	4.3%	3.6%	4.2%	6.7%
25-30 years old	14.7%	12.4%	11.4%	12.2%	10.5%
31-45 years old	39.3%	32.3%	36.4%	33.4%	27.0%
46-60 years old	28.7%	35.9%	32.8%	34.6%	31.1%
Over 60 years old	12.9%	15.0%	15.7%	15.7%	24.8%

### Occupation

Business owner or self-employed	15.9%	11.9%	12.9%	14.1%	10.1%
Upper/Middle management employee	56.6%	57.4%	56.7%	60.5%	51.2%
Auxiliary level employee	10.5%	10.2%	9.6%	7.3%	8.4%
Students	2.2%	2.8%	3.4%	2.3%	3.4%
Retired	13.0%	16.2%	16.6%	14.6%	25.7%
Unemployed / unpaid dom. work	1.8%	1.5%	0.9%	1.2%	1.3%

### Annual household income level

€12,000 - €24,000	21.9%	15.2%	14.8%	13.4%	15.0%
€24,001 - €36,000	19.6%	19.1%	23.6%	19.5%	22.0%
€36,001 - €48,000	14.5%	25.3%	22.1%	23.9%	23.3%
€48,001 - €60,000	21.2%	17.7%	15.9%	17.1%	15.1%
€60,001 - €72,000	7.4%	8.2%	7.4%	6.1%	7.1%
€72,001 - €84,000	6.6%	4.1%	4.3%	4.9%	4.6%
More than €84,000	8.7%	10.5%	12.0%	15.1%	12.9%

(\*) 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: Second Quarter

### Which island do they choose?



Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	16,372	22,400	35,323	37,487	32,790
- Fuerteventura	22,632	23,415	29,200	32,731	28,698
- Gran Canaria	8,509	14,745	20,491	25,162	26,832
- Tenerife	30,903	43,519	40,415	44,483	42,219
- La Palma	163	1,126	1,380	3,385	4,646

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	20.8%	21.3%	27.9%	26.2%	24.3%
- Fuerteventura	28.8%	22.3%	23.0%	22.8%	21.2%
- Gran Canaria	10.8%	14.0%	16.2%	17.6%	19.8%
- Tenerife	39.3%	41.4%	31.9%	31.1%	31.2%
- La Palma	0.2%	1.1%	1.1%	2.4%	3.4%

### Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	8.3%	6.0%	6.4%	6.2%	5.8%
Only with partner	39.5%	49.5%	49.8%	42.7%	49.5%
Only with children (under the age of 13)	1.1%	2.3%	2.1%	2.1%	0.8%
Partner + children (under the age of 13)	20.2%	16.2%	18.2%	17.8%	14.0%
Other relatives	4.6%	3.7%	2.0%	2.6%	4.3%
Friends	10.2%	6.6%	4.0%	8.0%	6.5%
Work colleagues	0.0%	0.2%	0.4%	0.0%	0.2%
Other combinations <sup>(1)</sup>	16.2%	15.5%	17.0%	20.6%	19.0%

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

### How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	87.8%	92.2%	94.2%	94.1%	93.2%
Average rating (scale 1-10)	8.60	8.66	8.86	8.85	8.85

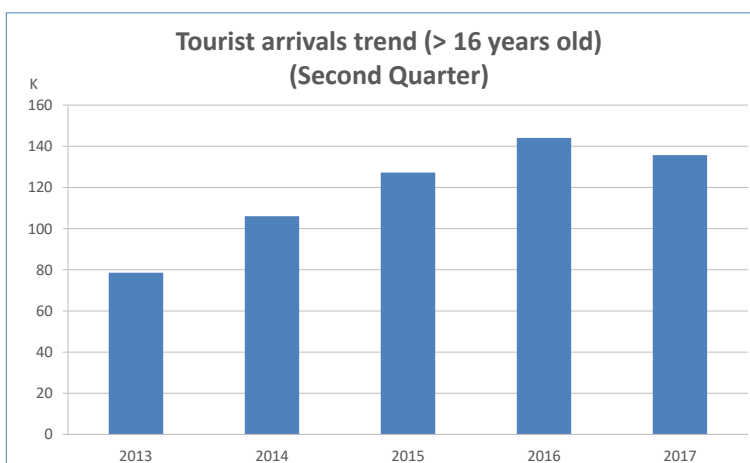
### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	51.2%	46.9%	42.1%	49.1%	53.7%
In love (at least 10 previous visits)	3.7%	6.4%	4.2%	4.0%	6.2%

### Where does the flight come from?



Ten main origin markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
France	22.0%	53.5%	58.1%	40.6%	64.1%
Spanish Mainland	55.7%	27.6%	18.1%	31.5%	24.4%
Switzerland	4.0%	4.9%	5.1%	7.4%	5.2%
Belgium	2.6%	4.1%	7.9%	9.4%	2.2%
Germany	7.4%	5.1%	4.0%	4.4%	1.1%
United Kingdom	0.1%	0.3%	1.9%	0.0%	0.6%
Ireland	0.0%	0.0%	0.0%	0.0%	0.2%
Netherlands	0.0%	0.1%	0.0%	0.0%	0.0%
Italy	0.0%	0.0%	0.3%	0.0%	0.0%
Norway	0.1%	0.0%	0.0%	0.2%	0.0%



### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	93.0%	93.1%	94.4%	91.8%	91.3%
Scenery	29.2%	40.2%	36.5%	35.5%	39.7%
Tranquillity/rest/relaxation	32.1%	31.4%	31.6%	31.6%	31.1%
Beaches	39.1%	28.1%	27.3%	32.3%	29.6%
Price	18.3%	21.2%	22.6%	19.3%	21.2%
Visiting new places	21.8%	23.1%	22.6%	20.8%	20.6%
Security	5.6%	6.0%	11.9%	13.0%	12.8%
Quality of the environment	6.2%	6.2%	5.3%	5.8%	8.8%
Active tourism	5.2%	8.5%	7.6%	9.3%	8.7%
Nautical activities	6.1%	3.9%	3.3%	4.4%	3.3%
Suitable destination for children	5.6%	3.4%	7.4%	5.9%	3.1%
Ease of travel	2.5%	4.7%	3.8%	2.4%	2.6%
Culture	1.5%	1.4%	1.4%	4.1%	2.1%
Nightlife/fun	4.0%	4.3%	1.9%	2.3%	1.6%
Shopping	2.3%	2.1%	1.4%	1.0%	1.5%
Rural tourism	0.2%	1.0%	2.2%	2.1%	1.1%

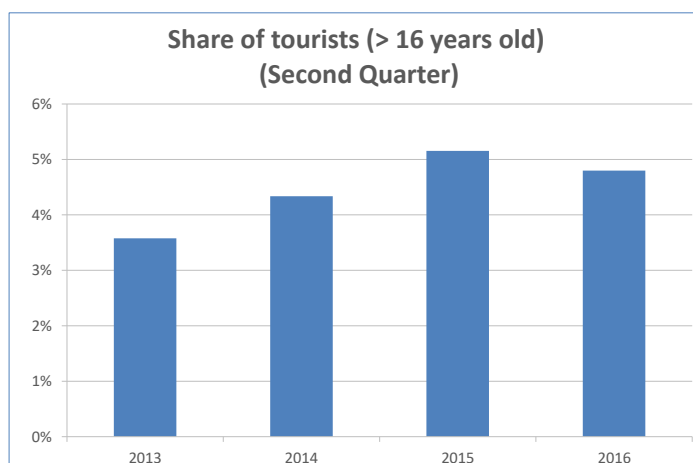
\* Multi-choice question

### What did motivate them to come?



Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	43.7%	38.3%	36.1%	43.0%	47.8%
Recommendation by friends or relatives	41.2%	35.8%	31.5%	36.2%	34.3%
The Canary Islands television channel	0.0%	0.6%	0.2%	0.3%	0.4%
Other television or radio channels	0.4%	1.6%	1.2%	1.1%	2.2%
Information in the press/magazines/books	7.6%	5.4%	7.6%	4.3%	7.2%
Attendance at a tourism fair	0.5%	0.6%	0.2%	2.1%	1.2%
Tour Operator's brochure or catalogue	11.1%	19.3%	19.3%	16.6%	14.5%
Recommendation by Travel Agency	12.3%	17.5%	19.4%	15.1%	14.8%
Information obtained via the Internet	31.0%	29.9%	29.5%	27.8%	27.3%
Senior Tourism programme	0.8%	0.2%	0.0%	0.0%	0.7%
Others	4.5%	7.6%	5.3%	4.5%	3.9%

\* 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.