

Tourist profile trend (2016)

France: Third Quarter

How many are they and how much do they spend?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	76,237	87,817	105,482	127,370	139,687
Average daily expenditure (€)	119.05	120.93	124.18	134.84	132.95
. in their place of residence	88.02	89.49	92.22	103.91	100.32
. in the Canary Islands	31.03	31.44	31.96	30.93	32.63
Average length of stay	10.23	11.78	9.76	9.62	9.82
Turnover per tourist (€)	1,097	1,218	1,102	1,189	1,243
Total turnover (> 16 years old) (€m)	83.6	107	116	151	174
Share of total turnover	29.3%	30.2%	28.1%	30.9%	31.2%
Share of total tourist	28.4%	28.1%	27.5%	27.8%	28.0%

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

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Accommodation (**):	51.09	50.43	45.50	32.03	55.48
- Accommodation	48.41	46.92	38.80	30.17	51.33
- Additional accommodation expenses	2.68	3.51	6.70	1.87	4.15
Transport:	29.36	36.75	26.47	31.01	35.77
- Public transport	2.32	6.38	7.02	6.66	8.19
- Taxi	6.16	9.12	4.61	3.64	5.71
- Car rental	20.88	21.25	14.84	20.71	21.87
Food and drink:	90.23	137.41	98.05	84.02	92.65
- Food purchases at supermarkets	38.16	70.93	49.44	30.81	31.98
- Restaurants	52.07	66.48	48.61	53.21	60.67
Souvenirs:	69.08	74.33	65.64	62.41	63.61
Leisure:	49.30	46.96	51.71	55.38	66.02
- Organized excursions	26.02	19.28	30.13	31.15	29.71
- Leisure, amusement	7.10	5.23	7.31	7.67	6.54
- Trip to other islands	2.48	5.27	2.53	1.92	5.10
- Sporting activities	6.94	9.04	5.85	6.89	13.41
- Cultural activities	2.94	4.14	2.29	3.55	5.77
- Discos and disco-pubs	3.82	4.00	3.60	4.19	5.49
Others:	11.80	18.08	13.98	13.97	13.22
- Wellness	5.05	3.17	3.01	3.78	6.48
- Medical expenses	0.52	1.00	1.11	1.13	1.31
- Other expenses	6.23	13.91	9.86	9.06	5.43

How far in advance do they book their trip?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.0%	0.0%	0.7%	0.8%	0.2%
Between 2 and 7 days	12.7%	4.3%	14.1%	6.9%	8.7%
Between 8 and 15 days	10.4%	15.0%	13.2%	11.4%	8.2%
Between 16 and 30 days	17.3%	20.4%	20.5%	13.0%	14.1%
Between 31 and 90 days	29.4%	24.7%	23.1%	28.3%	30.2%
More than 90 days	30.2%	35.6%	28.4%	39.6%	38.6%

What do they book at their place of residence?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	10.4%	10.8%	10.8%	4.8%	6.0%
Flight and accommodation (room only)	14.9%	17.5%	14.9%	14.8%	12.1%
Flight and accommodation (B&B)	3.6%	7.3%	4.8%	3.4%	4.3%
Flight and accommodation (half board)	15.2%	15.7%	15.2%	11.9%	19.0%
Flight and accommodation (full board)	7.6%	6.0%	6.0%	9.2%	10.3%
Flight and accommodation (all inclusive)	48.4%	42.6%	48.4%	55.9%	48.2%
% Tourists using low-cost airlines	58.0%	55.3%	63.1%	63.3%	60.5%
Other expenses in their place of residence:					
- Car rental	16.9%	27.2%	20.0%	18.9%	20.3%
- Sporting activities	7.1%	9.5%	8.0%	7.9%	14.3%
- Excursions	13.5%	21.7%	16.4%	15.8%	16.2%
- Trip to other islands	1.1%	3.1%	0.6%	1.3%	1.7%

How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Accommodation booking					
Tour Operator	34.2%	30.9%	37.9%	38.5%	32.1%
- Tour Operator's website	76.7%	81.7%	91.7%	79.8%	78.2%
Accommodation	14.7%	15.7%	11.3%	11.0%	15.2%
- Accommodation's website	76.8%	91.5%	89.6%	90.8%	85.6%
Travel agency (High street)	17.9%	19.5%	16.2%	24.4%	31.0%
Online Travel Agency (OTA)	27.4%	27.3%	26.9%	22.4%	19.5%
No need to book accommodation	5.7%	6.6%	7.7%	3.7%	2.1%

Flight booking

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tour Operator	35.1%	32.0%	42.0%	40.8%	33.4%
- Tour Operator's website	77.5%	71.8%	90.0%	79.6%	81.0%
Airline	21.2%	30.4%	18.6%	15.9%	22.4%
- Airline's website	90.5%	94.0%	100.0%	97.6%	93.6%
Travel agency (High street)	19.8%	17.6%	16.3%	25.2%	30.6%
Online Travel Agency (OTA)	23.9%	20.0%	23.2%	18.1%	13.6%

Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	8.9%	9.5%	9.4%	9.1%	3.7%
4* Hotel	40.0%	43.3%	45.8%	44.9%	50.5%
1-2-3* Hotel	18.9%	13.8%	14.5%	20.0%	20.0%
Apartment	27.4%	29.2%	22.7%	23.0%	23.9%
Property (privately-owned, friends, family)	4.4%	3.5%	5.7%	2.2%	1.3%
Others	0.3%	0.7%	1.9%	0.8%	0.6%

Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Gender					
Percentage of men	54.9%	49.1%	49.1%	46.4%	46.7%
Percentage of women	45.1%	50.9%	50.9%	53.6%	53.3%

Age

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Average age (tourists > 16 years old)	38.6	38.3	37.7	39.8	43.7
Standard deviation	13.0	11.6	13.4	12.1	14.5

Age range (> 16 years old)

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
16-24 years old	15.7%	11.9%	17.3%	12.3%	11.5%
25-30 years old	20.1%	19.8%	22.4%	16.8%	14.0%
31-45 years old	32.3%	39.3%	31.1%	36.5%	28.5%
46-60 years old	26.3%	26.3%	24.2%	30.4%	31.5%
Over 60 years old	5.5%	2.8%	5.0%	4.0%	14.6%

Occupation

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Business owner or self-employed	13.6%	23.7%	13.6%	13.2%	16.0%
Upper/Middle management employee	59.2%	48.9%	57.0%	68.2%	50.1%
Auxiliary level employee	7.2%	12.8%	12.0%	8.7%	13.0%
Students	11.4%	9.2%	10.1%	5.8%	6.6%
Retired	6.7%	3.3%	5.4%	2.6%	13.2%
Unemployed / unpaid dom. work	1.9%	2.1%	1.8%	1.5%	1.1%

Annual household income level

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
€12,000 - €24,000	23.0%	20.6%	26.1%	17.8%	19.7%
€24,001 - €36,000	22.8%	21.2%	25.4%	24.0%	25.1%
€36,001 - €48,000	20.4%	20.6%	17.2%	16.5%	15.9%
€48,001 - €60,000	13.4%	14.7%	13.2%	15.8%	15.7%
€60,001 - €72,000	5.2%	6.9%	4.7%	12.4%	8.0%
€72,001 - €84,000	5.6%	5.4%	4.1%	3.6%	3.9%
More than €84,000	9.6%	10.6%	9.3%	10.0%	11.8%

(*) 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.

Tourist profile trend (2016)

France: Third Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	14,248	17,683	18,718	33,565	33,723
- Fuerteventura	20,891	23,466	23,907	30,174	38,923
- Gran Canaria	8,353	10,346	17,166	22,099	25,793
- Tenerife	31,692	34,522	42,792	39,341	38,179
- La Palma	728	1,620	1,870	1,367	2,751

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	18.8%	20.2%	17.9%	26.5%	24.2%
- Fuerteventura	27.5%	26.8%	22.9%	23.8%	27.9%
- Gran Canaria	11.0%	11.8%	16.4%	17.5%	18.5%
- Tenerife	41.7%	39.4%	41.0%	31.1%	27.4%
- La Palma	1.0%	1.8%	1.8%	1.1%	2.0%

Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	7.2%	10.9%	10.4%	6.3%	6.1%
Only with partner	39.1%	29.4%	39.7%	38.3%	45.5%
Only with children (under the age of 13)	1.8%	5.2%	2.7%	2.0%	1.2%
Partner + children (under the age of 13)	14.1%	20.4%	14.3%	17.7%	11.9%
Other relatives	5.2%	3.4%	5.8%	3.8%	2.4%
Friends	9.2%	9.5%	6.5%	6.5%	5.9%
Work colleagues	0.4%	0.0%	0.3%	0.3%	0.1%
Other combinations ⁽¹⁾	23.0%	21.2%	20.3%	25.2%	26.9%

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

How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	90.8%	91.8%	90.9%	91.5%	94.9%
Average rating (scale 1-10)	8.61	8.79	8.60	8.65	8.72

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	35.3%	33.2%	31.8%	33.7%	41.2%
In love (at least 10 previous visits)	2.3%	3.7%	2.1%	1.7%	5.8%

Where does the flight come from?



Ten main origin countries	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
France	57.7%	21.5%	60.9%	69.5%	47.8%
Spanish Mainland	16.8%	42.9%	18.7%	12.1%	23.7%
Switzerland	6.3%	3.8%	3.6%	3.2%	10.8%
Belgium	6.9%	13.2%	9.6%	6.1%	9.8%
Germany	4.8%	4.3%	1.5%	2.5%	1.9%
United Kingdom	0.0%	0.8%	0.0%	0.2%	0.2%
Ireland	0.3%	0.0%	0.0%	0.3%	0.0%
Italy	0.0%	0.0%	0.4%	0.0%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Norway	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	91.3%	87.9%	90.3%	88.6%	90.5%
Beaches	42.7%	40.2%	34.5%	39.0%	40.3%
Scenery	32.8%	27.4%	35.6%	35.3%	35.7%
Tranquility/rest/relaxation	38.0%	26.7%	35.2%	31.8%	30.2%
Visiting new places	22.7%	22.0%	23.7%	26.3%	24.1%
Price	22.0%	24.1%	28.8%	23.4%	16.8%
Security	6.3%	2.2%	3.8%	9.7%	10.2%
Active tourism	4.7%	6.0%	4.3%	8.0%	7.6%
Nautical activities	3.8%	9.9%	6.3%	5.9%	7.6%
Ease of travel	1.4%	0.8%	1.8%	3.5%	3.5%
Suitable destination for children	4.2%	3.9%	4.8%	3.1%	3.2%
Quality of the environment	2.5%	4.8%	2.8%	4.0%	2.8%
Nightlife/fun	3.4%	4.9%	5.4%	3.1%	2.6%
Culture	1.8%	3.0%	1.0%	1.5%	1.8%
Theme parks	4.5%	1.3%	2.8%	1.2%	1.5%
Rural tourism	1.1%	1.0%	3.5%	1.9%	1.1%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	30.4%	26.8%	25.8%	25.7%	35.7%
Recommendation by friends or relatives	43.7%	45.9%	39.0%	34.2%	35.4%
The Canary Islands television channel	0.0%	0.0%	0.4%	0.9%	0.2%
Other television or radio channels	0.4%	2.8%	1.7%	1.5%	3.8%
Information in the press/magazines/books	8.1%	8.8%	6.6%	6.5%	4.7%
Attendance at a tourism fair	1.3%	1.5%	0.3%	0.6%	1.2%
Tour Operator's brochure or catalogue	21.0%	17.8%	16.0%	22.6%	21.1%
Recommendation by Travel Agency	12.3%	13.4%	13.3%	17.3%	19.5%
Information obtained via the Internet	34.8%	35.8%	42.6%	36.3%	27.0%
Senior Tourism programme	0.3%	0.0%	0.0%	0.3%	0.0%
Others	4.4%	7.1%	7.4%	3.6%	4.7%

* 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.