

# Tourist profile trend (2017)

## France: Third Quarter

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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	87,817	105,482	127,370	139,687	135,221
Average daily expenditure (€)	120.93	124.18	134.84	132.95	133.51
. in their place of residence	89.49	92.22	103.91	100.32	103.45
. in the Canary Islands	31.44	31.96	30.93	32.63	30.06
Average length of stay	11.78	9.76	9.62	9.82	9.67
Turnover per tourist (€)	1,218	1,102	1,189	1,243	1,218
Total turnover (> 16 years old) (€m)	107	116	151	174	165
Share of total turnover	30.2%	28.1%	30.9%	31.2%	--
Share of total tourist	28.1%	27.5%	27.8%	28.0%	--

Expenditure in the Canary Islands per tourist and trip (€) (**)					
<b>Accommodation (**):</b>	50.43	45.50	32.03	55.48	58.39
- Accommodation	46.92	38.80	30.17	51.33	26.92
- Additional accommodation expenses	3.51	6.70	1.87	4.15	31.47
<b>Transport:</b>	36.75	26.47	31.01	35.77	28.71
- Public transport	6.38	7.02	6.66	8.19	5.15
- Taxi	9.12	4.61	3.64	5.71	5.82
- Car rental	21.25	14.84	20.71	21.87	17.74
<b>Food and drink:</b>	137.41	98.05	84.02	92.65	95.53
- Food purchases at supermarkets	70.93	49.44	30.81	31.98	30.21
- Restaurants	66.48	48.61	53.21	60.67	65.32
<b>Souvenirs:</b>	74.33	65.64	62.41	63.61	54.14
<b>Leisure:</b>	46.96	51.71	55.38	66.02	51.50
- Organized excursions	19.28	30.13	31.15	29.71	32.36
- Leisure, amusement	5.23	7.31	7.67	6.54	6.51
- Trip to other islands	5.27	2.53	1.92	5.10	2.31
- Sporting activities	9.04	5.85	6.89	13.41	7.21
- Cultural activities	4.14	2.29	3.55	5.77	2.43
- Discos and disco-pubs	4.00	3.60	4.19	5.49	0.68
<b>Others:</b>	18.08	13.98	13.97	13.22	9.48
- Wellness	3.17	3.01	3.78	6.48	4.14
- Medical expenses	1.00	1.11	1.13	1.31	0.28
- Other expenses	13.91	9.86	9.06	5.43	5.06

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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.0%	0.7%	0.8%	0.2%	0.4%
Between 2 and 7 days	4.3%	14.1%	6.9%	8.7%	6.8%
Between 8 and 15 days	15.0%	13.2%	11.4%	8.2%	8.7%
Between 16 and 30 days	20.4%	20.5%	13.0%	14.1%	13.8%
Between 31 and 90 days	24.7%	23.1%	28.3%	30.2%	28.5%
More than 90 days	35.6%	28.4%	39.6%	38.6%	41.8%

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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	10.8%	10.8%	4.8%	6.0%	4.7%
Flight and accommodation (room only)	17.5%	14.9%	14.8%	12.1%	16.5%
Flight and accommodation (B&B)	7.3%	4.8%	3.4%	4.3%	4.8%
Flight and accommodation (half board)	15.7%	15.2%	11.9%	19.0%	15.2%
Flight and accommodation (full board)	6.0%	6.0%	9.2%	10.3%	8.5%
Flight and accommodation (all inclusive)	42.6%	48.4%	55.9%	48.2%	50.3%
<b>% Tourists using low-cost airlines</b>	55.3%	63.1%	63.3%	60.5%	60.7%
<b>Other expenses in their place of residence:</b>					
- Car rental	27.2%	20.0%	18.9%	20.3%	20.1%
- Sporting activities	9.5%	8.0%	7.9%	14.3%	13.6%
- Excursions	21.7%	16.4%	15.8%	16.2%	24.1%
- Trip to other islands	3.1%	0.6%	1.3%	1.7%	1.2%

### How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	30.9%	37.9%	38.5%	32.1%	34.3%
- Tour Operator's website	81.7%	91.7%	79.8%	78.2%	86.1%
<b>Accommodation</b>	15.7%	11.3%	11.0%	15.2%	9.2%
- Accommodation's website	91.5%	89.6%	90.8%	85.6%	92.0%
<b>Travel agency (High street)</b>	19.5%	16.2%	24.4%	31.0%	27.8%
<b>Online Travel Agency (OTA)</b>	27.3%	26.9%	22.4%	19.5%	24.1%
<b>No need to book accommodation</b>	6.6%	7.7%	3.7%	2.1%	4.7%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	32.0%	42.0%	40.8%	33.4%	35.2%
- Tour Operator's website	71.8%	90.0%	79.6%	81.0%	86.1%
<b>Airline</b>	30.4%	18.6%	15.9%	22.4%	18.8%
- Airline's website	94.0%	100.0%	97.6%	93.6%	95.1%
<b>Travel agency (High street)</b>	17.6%	16.3%	25.2%	30.6%	29.1%
<b>Online Travel Agency (OTA)</b>	20.0%	23.2%	18.1%	13.6%	16.8%

### Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	9.5%	9.4%	9.1%	3.7%	7.5%
4* Hotel	43.3%	45.8%	44.9%	50.5%	46.8%
1-2-3* Hotel	13.8%	14.5%	20.0%	20.0%	21.4%
Apartment	29.2%	22.7%	23.0%	23.9%	20.4%
Property (privately-owned, friends, family)	3.5%	5.7%	2.2%	1.3%	2.5%
Others	0.7%	1.9%	0.8%	0.6%	1.4%

### Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Gender</b>					
Percentage of men	49.1%	49.1%	46.4%	46.7%	44.6%
Percentage of women	50.9%	50.9%	53.6%	53.3%	55.4%

Age					
Average age (tourists > 16 years old)	38.3	37.7	39.8	43.7	43.1
Standard deviation	11.6	13.4	12.1	14.5	14.7

Age range (> 16 years old)					
16-24 years old	11.9%	17.3%	12.3%	11.5%	13.8%
25-30 years old	19.8%	22.4%	16.8%	14.0%	12.4%
31-45 years old	39.3%	31.1%	36.5%	28.5%	28.4%
46-60 years old	26.3%	24.2%	30.4%	31.5%	31.4%
Over 60 years old	2.8%	5.0%	4.0%	14.6%	14.1%

Occupation					
Business owner or self-employed	23.7%	13.6%	13.2%	16.0%	15.0%
Upper/Middle management employee	48.9%	57.0%	68.2%	50.1%	55.2%
Auxiliary level employee	12.8%	12.0%	8.7%	13.0%	7.2%
Students	9.2%	10.1%	5.8%	6.6%	9.1%
Retired	3.3%	5.4%	2.6%	13.2%	11.9%
Unemployed / unpaid dom. work	2.1%	1.8%	1.5%	1.1%	1.7%

Annual household income level					
€12,000 - €24,000	20.6%	26.1%	17.8%	19.7%	17.6%
€24,001 - €36,000	21.2%	25.4%	24.0%	25.1%	24.3%
€36,001 - €48,000	20.6%	17.2%	16.5%	15.9%	22.7%
€48,001 - €60,000	14.7%	13.2%	15.8%	15.7%	12.8%
€60,001 - €72,000	6.9%	4.7%	12.4%	8.0%	6.5%
€72,001 - €84,000	5.4%	4.1%	3.6%	3.9%	6.0%
More than €84,000	10.6%	9.3%	10.0%	11.8%	10.1%

(\*) 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: Third Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	17,683	18,718	33,565	33,723	31,902
- Fuerteventura	23,466	23,907	30,174	38,923	29,347
- Gran Canaria	10,346	17,166	22,099	25,793	28,290
- Tenerife	34,522	42,792	39,341	38,179	40,742
- La Palma	1,620	1,870	1,367	2,751	4,713

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	20.2%	17.9%	26.5%	24.2%	23.6%
- Fuerteventura	26.8%	22.9%	23.8%	27.9%	21.7%
- Gran Canaria	11.8%	16.4%	17.5%	18.5%	21.0%
- Tenerife	39.4%	41.0%	31.1%	27.4%	30.2%
- La Palma	1.8%	1.8%	1.1%	2.0%	3.5%

#### Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	10.9%	10.4%	6.3%	6.1%	7.1%
Only with partner	29.4%	39.7%	38.3%	45.5%	41.7%
Only with children (under the age of 13)	5.2%	2.7%	2.0%	1.2%	4.4%
Partner + children (under the age of 13)	20.4%	14.3%	17.7%	11.9%	14.5%
Other relatives	3.4%	5.8%	3.8%	2.4%	5.0%
Friends	9.5%	6.5%	6.5%	5.9%	5.1%
Work colleagues	0.0%	0.3%	0.3%	0.1%	0.1%
Other combinations <sup>(1)</sup>	21.2%	20.3%	25.2%	26.9%	22.1%

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

#### How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	91.8%	90.9%	91.5%	94.9%	92.5%
Average rating (scale 1-10)	8.79	8.60	8.65	8.72	8.71

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

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	33.2%	31.8%	33.7%	41.2%	41.6%
In love (at least 10 previous visits)	3.7%	2.1%	1.7%	5.8%	6.6%

#### Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
France	21.5%	60.9%	69.5%	47.8%	67.0%
Spanish Mainland	42.9%	18.7%	12.1%	23.7%	16.3%
Switzerland	3.8%	3.6%	3.2%	10.8%	6.0%
Belgium	13.2%	9.6%	6.1%	9.8%	5.2%
Germany	4.3%	1.5%	2.5%	1.9%	2.1%
Sweden	0.0%	0.0%	0.0%	0.0%	0.3%
Ireland	0.0%	0.0%	0.3%	0.0%	0.0%
Italy	0.0%	0.4%	0.0%	0.0%	0.0%
United Kingdom	0.8%	0.0%	0.2%	0.2%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.0%



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



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	87.9%	90.3%	88.6%	90.5%	91.4%
Scenery	27.4%	35.6%	35.3%	35.7%	39.9%
Beaches	40.2%	34.5%	39.0%	40.3%	38.3%
Tranquillity/rest/relaxation	26.7%	35.2%	31.8%	30.2%	29.0%
Visiting new places	22.0%	23.7%	26.3%	24.1%	23.1%
Price	24.1%	28.8%	23.4%	16.8%	19.7%
Security	2.2%	3.8%	9.7%	10.2%	10.3%
Quality of the environment	4.8%	2.8%	4.0%	2.8%	6.7%
Nautical activities	9.9%	6.3%	5.9%	7.6%	6.2%
Active tourism	6.0%	4.3%	8.0%	7.6%	5.9%
Suitable destination for children	3.9%	4.8%	3.1%	3.2%	3.6%
Nightlife/fun	4.9%	5.4%	3.1%	2.6%	2.2%
Ease of travel	0.8%	1.8%	3.5%	3.5%	2.0%
Theme parks	1.3%	2.8%	1.2%	1.5%	1.9%
Culture	3.0%	1.0%	1.5%	1.8%	1.2%
Shopping	2.4%	2.1%	1.1%	0.6%	1.0%

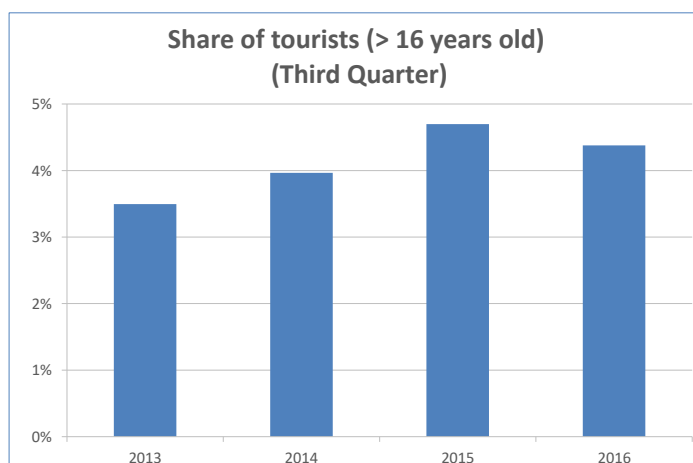
\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	26.8%	25.8%	25.7%	35.7%	33.6%
Recommendation by friends or relatives	45.9%	39.0%	34.2%	35.4%	36.4%
The Canary Islands television channel	0.0%	0.4%	0.9%	0.2%	0.0%
Other television or radio channels	2.8%	1.7%	1.5%	3.8%	2.9%
Information in the press/magazines/books	8.8%	6.6%	6.5%	4.7%	6.8%
Attendance at a tourism fair	1.5%	0.3%	0.6%	1.2%	0.6%
Tour Operator's brochure or catalogue	17.8%	16.0%	22.6%	21.1%	19.2%
Recommendation by Travel Agency	13.4%	13.3%	17.3%	19.5%	15.2%
Information obtained via the Internet	35.8%	42.6%	36.3%	27.0%	34.0%
Senior Tourism programme	0.0%	0.0%	0.3%	0.0%	0.0%
Others	7.1%	7.4%	3.6%	4.7%	3.6%

\* 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.