

PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2019)

FRANCE



How many are they and how much do they spend?



| | France | All markets |
|---|----------------|-------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | 583,267 | 15,110,866 |
| Tourist arrivals > 15 years old (EGT) | 512,684 | 13,271,035 |
| - book holiday package | 273,357 | 7,426,022 |
| - do not book holiday package | 239,327 | 5,845,014 |
| - % tourists who book holiday package | 53.3% | 56.0% |
| Share of total tourist | 3.9% | 100% |

RANKING POSITION BY
NUMBER OF TOURISTS

RANKING POSITION BY
TURNOVER



37.4% of French
travel to Tenerife.

| | France | All markets |
|--|--------------|---------------|
| Expenditure per tourist (€) | 1,095 | 1,136 |
| - book holiday package | 1,166 | 1,268 |
| - holiday package | 981 | 1,031 |
| - others | 185 | 237 |
| - do not book holiday package | 1,013 | 967 |
| - flight | 274 | 263 |
| - accommodation | 396 | 321 |
| - others | 343 | 383 |
| Average length of stay | 8.51 | 9.09 |
| - book holiday package | 7.88 | 8.64 |
| - do not book holiday package | 9.23 | 9.68 |
| Average daily expenditure (€) | 137.2 | 138.9 |
| - book holiday package | 152.8 | 155.4 |
| - do not book holiday package | 119.5 | 117.9 |
| Total turnover (> 15 years old) (€m) | 561 | 15,070 |
| - book holiday package | 319 | 9,416 |
| - do not book holiday package | 243 | 5,655 |

AVERAGE LENGTH OF STAY
(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



| | France | All markets |
|----------------------|--------|-------------|
| Climate | 78.5% | 78.4% |
| Landscapes | 55.2% | 33.1% |
| Tranquility | 50.7% | 47.6% |
| Sea | 48.1% | 44.4% |
| Safety | 45.5% | 51.9% |
| Price | 44.3% | 37.4% |
| Accommodation supply | 42.9% | 42.9% |
| Environment | 42.3% | 33.2% |
| Beaches | 36.4% | 37.7% |
| European belonging | 35.7% | 36.1% |
| Authenticity | 30.9% | 20.3% |
| Effortless trip | 24.0% | 35.2% |
| Exoticism | 22.4% | 11.4% |
| Gastronomy | 18.7% | 23.2% |
| Fun possibilities | 16.4% | 21.1% |
| Hiking trail network | 15.4% | 9.6% |
| Historical heritage | 15.3% | 8.2% |
| Shopping | 11.5% | 9.4% |
| Culture | 11.0% | 8.0% |
| Nightlife | 7.3% | 8.0% |

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")

% of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE LANDSCAPES

FRANCE
55.2%



ALL MARKETS
33.1%

What is the main motivation for their holidays?



| | France | All markets |
|-------------------------|--------|-------------|
| Rest | 38.5% | 55.5% |
| Enjoy family time | 9.9% | 14.4% |
| Have fun | 4.9% | 8.6% |
| Explore the destination | 43.1% | 17.8% |
| Practice their hobbies | 1.7% | 1.9% |
| Other reasons | 1.9% | 1.8% |

EXPLORE THE
DESTINATION



How far in advance do they book their trip?



| | France | All markets |
|------------------------|--------|-------------|
| The same day | 1.0% | 0.7% |
| Between 1 and 30 days | 22.7% | 23.8% |
| Between 1 and 2 months | 25.3% | 22.8% |
| Between 3 and 6 months | 37.2% | 32.7% |
| More than 6 months | 13.8% | 20.0% |

Source: Encuesta sobre el Gasto Turístico (ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

What channels did they use to get information about the trip? 🔍

| | France | All markets |
|---------------------------------------|--------|-------------|
| Previous visits to the Canary Islands | 31.9% | 51.9% |
| Friends or relatives | 24.0% | 27.1% |
| Internet or social media | 56.3% | 54.7% |
| Mass Media | 1.1% | 1.6% |
| Travel guides and magazines | 15.9% | 8.4% |
| Travel Blogs or Forums | 8.9% | 5.7% |
| Travel TV Channels | 0.7% | 0.8% |
| Tour Operator or Travel Agency | 28.6% | 22.6% |
| Public administrations or similar | 0.4% | 0.4% |
| Others | 2.0% | 2.4% |

* Multi-choice question

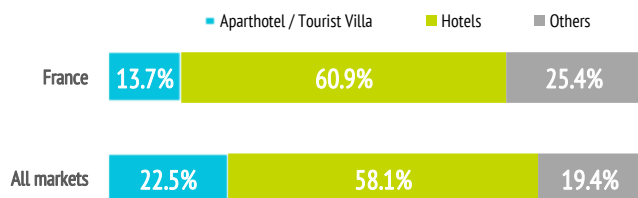
With whom did they book their flight and accommodation? 👁

| | France | All markets |
|-----------------------------------|--------|-------------|
| Flight | | |
| - Directly with the airline | 43.2% | 42.9% |
| - Tour Operator or Travel Agency | 56.8% | 57.1% |
| Accommodation | | |
| - Directly with the accommodation | 34.2% | 31.5% |
| - Tour Operator or Travel Agency | 65.8% | 68.5% |

Where do they stay? 🏠

| | France | All markets |
|---|--------|-------------|
| 1-2-3* Hotel | 10.0% | 11.5% |
| 4* Hotel | 42.2% | 37.6% |
| 5* Hotel / 5* Luxury Hotel | 8.7% | 9.0% |
| Aparthotel / Tourist Villa | 13.7% | 22.5% |
| House/room rented in a private dwelling | 10.1% | 5.9% |
| Private accommodation (1) | 5.9% | 7.2% |
| Others (Cottage, cruise, camping,...) | 9.3% | 6.3% |

(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.



What do they book? 🍽

| | France | All markets |
|-------------------|--------|-------------|
| Room only | 23.9% | 27.9% |
| Bed and Breakfast | 7.7% | 12.4% |
| Half board | 18.2% | 21.2% |
| Full board | 9.1% | 3.6% |
| All inclusive | 41.2% | 34.9% |

”
41.2% of French book all inclusive.
 (Canary Islands: 34.9%)

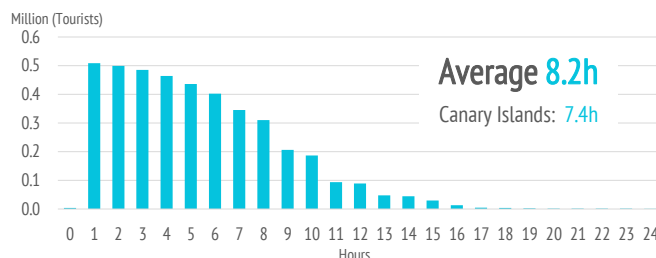
Other expenses 📍

| | France | All markets |
|-----------------------------------|--------|-------------|
| Restaurants or cafes | 51.9% | 59.1% |
| Supermarkets | 42.1% | 52.1% |
| Car rental | 42.9% | 26.3% |
| Organized excursions | 32.5% | 20.6% |
| Taxi, transfer, chauffeur service | 45.8% | 50.0% |
| Theme Parks | 6.9% | 7.5% |
| Sport activities | 7.4% | 5.7% |
| Museums | 11.4% | 4.6% |
| Flights between islands | 6.3% | 4.4% |

Activities in the Canary Islands 🚶

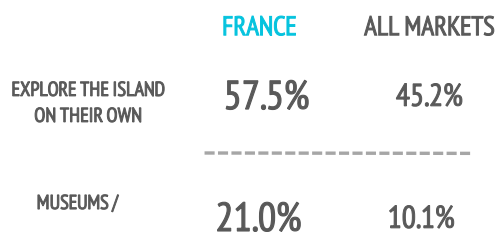
| Outdoor time per day | France | All markets |
|----------------------|--------|-------------|
| 0 hours | 0.7% | 2.1% |
| 1 - 2 hours | 4.6% | 9.8% |
| 3 - 6 hours | 27.2% | 32.6% |
| 7 - 12 hours | 58.2% | 47.1% |
| More than 12 hours | 9.2% | 8.4% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | France | All markets |
|--|--------|-------------|
| Walk, wander | 74.0% | 69.8% |
| Beach | 70.5% | 66.3% |
| Swimming pool, hotel facilities | 65.1% | 58.2% |
| Explore the island on their own | 57.5% | 45.2% |
| Organized excursions | 25.2% | 16.9% |
| Museums / exhibitions | 21.0% | 10.1% |
| Sport activities | 18.0% | 13.4% |
| Nature activities | 15.6% | 10.4% |
| Wineries / markets / popular festivals | 15.6% | 11.6% |
| Sea excursions / whale watching | 14.8% | 11.1% |
| Taste Canarian gastronomy | 14.1% | 24.2% |
| Theme parks | 13.2% | 14.1% |
| Activities at sea | 10.6% | 10.0% |
| Nightlife / concerts / shows | 9.5% | 15.5% |
| Beauty and health treatments | 7.1% | 5.4% |
| Astronomical observation | 2.7% | 3.5% |

* Multi-choice question



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FRANCE



Which island do they choose?

| Tourists (> 15 years old) | France | All markets |
|---------------------------|---------|-------------|
| Lanzarote | 131,768 | 2,521,668 |
| Fuerteventura | 97,545 | 1,659,115 |
| Gran Canaria | 81,909 | 3,698,127 |
| Tenerife | 190,802 | 5,040,382 |
| La Palma | 7,802 | 235,409 |

How many islands do they visit during their trip?

| | France | All markets |
|-----------------------|--------|-------------|
| One island | 88.8% | 91.4% |
| Two islands | 9.6% | 7.2% |
| Three or more islands | 1.6% | 1.4% |

Internet usage during their trip

| | France | All markets |
|-------------------------|--------|-------------|
| Research | | |
| - Tourist package | 13.0% | 14.8% |
| - Flights | 7.4% | 13.0% |
| - Accommodation | 11.6% | 16.9% |
| - Transport | 9.5% | 15.7% |
| - Restaurants | 22.0% | 28.4% |
| - Excursions | 25.4% | 26.2% |
| - Activities | 28.3% | 30.1% |
| Book or purchase | | |
| - Tourist package | 25.4% | 39.4% |
| - Flights | 68.3% | 66.7% |
| - Accommodation | 61.9% | 57.3% |
| - Transport | 52.5% | 47.6% |
| - Restaurants | 10.7% | 12.1% |
| - Excursions | 12.0% | 13.0% |
| - Activities | 13.4% | 14.7% |

* Multi-choise question

| Internet usage in the Canary Islanc | France | All markets |
|-------------------------------------|--------------|--------------|
| Did not use the Internet | 8.9% | 8.3% |
| Used the Internet | 91.1% | 91.7% |
| - Own Internet connection | 42.7% | 37.4% |
| - Free Wifi connection | 33.6% | 39.5% |
| Applications* | | |
| - Search for locations or maps | 71.9% | 61.7% |
| - Search for destination info | 33.2% | 44.8% |
| - Share pictures or trip videos | 64.4% | 56.0% |
| - Download tourist apps | 7.8% | 7.0% |
| - Others | 12.7% | 22.6% |

* Multi-choise question



71.9% of French search locations or maps during their stay in the Canary Islands

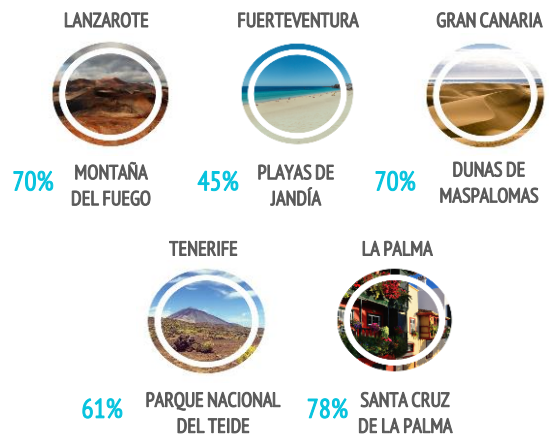
(Canary Islands: 61.7%)



Picture: Freepik.com

| Share by islands | France | All markets |
|------------------|--------|-------------|
| Lanzarote | 25.8% | 19.2% |
| Fuerteventura | 19.1% | 12.6% |
| Gran Canaria | 16.1% | 28.1% |
| Tenerife | 37.4% | 38.3% |
| La Palma | 1.5% | 1.8% |

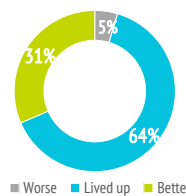
MOST VISITED PLACES IN EACH ISLAND



The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | France | All markets |
|---|--------|-------------|
| Average rating | 8.46 | 8.70 |
| Experience in the Canary Islands | | |
| Worse or much worse than expected | 4.6% | 2.3% |
| Lived up to expectations | 64.0% | 55.6% |
| Better or much better than expected | 31.5% | 42.1% |
| Future intentions (scale 1-10) | | |
| Return to the Canary Islands | 8.11 | 8.73 |
| Recommend visiting the Canary Islanc | 8.60 | 8.95 |



Experience in the Canary Islands



8.11/10

Return to the Canary Islands



8.60/10

Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

| | France | All markets |
|--|--------------|--------------|
| Repeat tourists | 46.3% | 72.2% |
| Repeat tourists (last 5 years) | 43.6% | 66.7% |
| Repeat tourists (last 5 years) (5 or mc) | 9.6% | 19.5% |
| At least 10 previous visits | 5.3% | 18.6% |

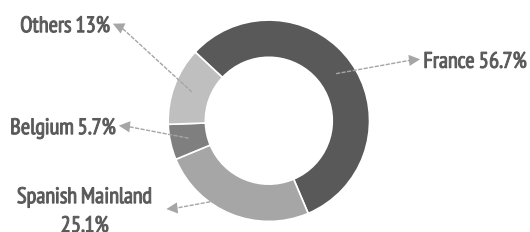
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FRANCE

Where does the flight come from?



| | % | Absolute |
|------------------|-------|----------|
| France | 56.7% | 290,529 |
| Spanish Mainland | 25.1% | 128,820 |
| Belgium | 5.7% | 29,173 |
| Switzerland | 5.5% | 28,267 |
| Luxembourg | 2.6% | 13,499 |
| Germany | 1.7% | 8,773 |
| Others | 2.7% | 13,623 |



Who do they come with?



| | France | All markets |
|-------------------------------------|--------|-------------|
| Unaccompanied | 5.4% | 9.6% |
| Only with partner | 49.0% | 48.1% |
| Only with children (< 13 years old) | 8.1% | 5.6% |
| Partner + children (< 13 years old) | 6.5% | 6.5% |
| Other relatives | 7.2% | 9.3% |
| Friends | 5.1% | 6.4% |
| Work colleagues | 0.2% | 0.5% |
| Organized trip | 0.4% | 0.3% |
| Other combinations (1) | 18.1% | 13.7% |

(1) Different situations have been isolated

| | | |
|----------------------------------|--------------|--------------|
| Tourists with children | 20.1% | 17.7% |
| - Between 0 and 2 years old | 1.6% | 1.6% |
| - Between 3 and 12 years old | 17.1% | 14.8% |
| - Between 0-2 and 3-12 years | 1.4% | 1.4% |
| Tourists without children | 79.9% | 82.3% |
| Group composition: | | |
| - 1 person | 7.7% | 13.2% |
| - 2 people | 55.4% | 55.1% |
| - 3 people | 13.7% | 12.0% |
| - 4 or 5 people | 20.0% | 16.3% |
| - 6 or more people | 3.2% | 3.5% |
| Average group size: | 2.67 | 2.54 |



(Under the age of 13)

20.1% of French travel with children.

(Canary Islands: 17.7%)

Who are they?



| | France | All markets |
|--------------------------------------|--------|-------------|
| Gender | | |
| Men | 52.3% | 48.6% |
| Women | 47.7% | 51.4% |
| Age | | |
| Average age (tourist > 15 years old) | 46.6 | 47.1 |
| Standard deviation | 15.1 | 15.4 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 6.7% | 7.3% |
| 25 - 30 years old | 12.4% | 10.9% |
| 31 - 45 years old | 28.1% | 28.0% |
| 46 - 60 years old | 33.2% | 31.8% |
| Over 60 years old | 19.6% | 22.1% |
| Occupation | | |
| Salaried worker | 61.1% | 55.0% |
| Self-employed | 8.9% | 11.5% |
| Unemployed | 0.9% | 1.1% |
| Business owner | 7.3% | 9.4% |
| Student | 3.6% | 3.5% |
| Retired | 17.0% | 17.9% |
| Unpaid domestic work | 0.4% | 0.8% |
| Others | 0.9% | 0.8% |
| Annual household income level | | |
| Less than €25,000 | 13.2% | 17.5% |
| €25,000 - €49,999 | 46.8% | 37.5% |
| €50,000 - €74,999 | 23.1% | 22.8% |
| More than €74,999 | 16.9% | 22.2% |
| Education level | | |
| No studies | 0.9% | 5.0% |
| Primary education | 2.1% | 2.6% |
| Secondary education | 23.4% | 23.6% |
| Higher education | 73.6% | 68.9% |



4 IN 10 TOURISTS ARE REPEATERS

47 YEARS OLD

AVERAGE AGE

49% ONLY WITH PARTNER



Pictures: Freepik.com