

Tourist profile trend (2016)

Canary Islands: French market

How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	268,872	312,932	383,872	457,716	498,461
Average daily expenditure (€)	127.76	128.91	132.67	131.71	134.77
- in their place of residence	93.42	95.83	97.85	99.01	101.42
- in the Canary Islands	34.34	33.08	34.82	32.70	33.34
Average length of stay	9.31	10.13	8.94	8.87	8.86
Turnover per tourist (€)	1,063	1,133	1,078	1,072	1,115
Total turnover (> 16 years old) (€m)	286	355	414	490	556
French turnover: year on year change	--	24.1%	16.7%	18.5%	13.3%
French tourist arrivals: year on year change	--	16.4%	22.7%	19.2%	8.9%

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

Accommodation (**):	45.38	50.19	55.39	42.33	47.49
- Accommodation	41.96	46.96	50.95	37.76	43.35
- Additional accommodation expenses	3.42	3.22	4.43	4.56	4.14
Transport:	31.16	34.53	31.46	30.81	31.81
- Public transport	3.41	6.30	5.88	5.83	5.71
- Taxi	4.83	5.80	3.50	3.35	4.22
- Car rental	22.92	22.44	22.08	21.64	21.89
Food and drink:	96.63	107.19	94.34	86.98	98.94
- Food purchases at supermarkets	39.45	48.64	40.27	34.62	36.57
- Restaurants	57.18	58.55	54.07	52.37	62.37
Souvenirs:	65.46	62.75	63.98	59.85	54.73
Leisure:	46.48	43.87	41.90	45.40	45.53
- Organized excursions	22.83	21.00	21.66	24.28	20.83
- Leisure, amusement	6.47	4.85	5.35	5.41	6.06
- Trip to other islands	2.84	3.32	2.71	2.07	2.39
- Sporting activities	6.97	6.85	6.06	6.67	8.32
- Cultural activities	3.04	4.28	2.91	3.61	3.73
- Discos and disco-pubs	4.32	3.58	3.21	3.37	4.21
Others:	17.62	17.00	13.02	15.09	11.85
- Wellness	3.28	5.19	3.71	5.25	4.85
- Medical expenses	0.61	1.27	1.12	0.95	0.94
- Other expenses	13.73	10.54	8.19	8.88	6.06

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.1%	0.1%	0.4%	0.4%	0.7%
Between 2 and 7 days	10.4%	8.7%	10.5%	7.0%	7.5%
Between 8 and 15 days	11.3%	13.2%	11.5%	11.6%	8.4%
Between 16 and 30 days	17.7%	19.3%	18.3%	14.6%	16.3%
Between 31 and 90 days	35.2%	34.3%	33.6%	37.3%	35.5%
More than 90 days	25.3%	24.4%	25.8%	29.1%	31.6%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	10.8%	9.9%	9.8%	8.1%	6.0%
Flight and accommodation (room only)	14.5%	17.2%	14.8%	16.1%	15.0%
Flight and accommodation (B&B)	4.3%	5.7%	4.6%	3.9%	5.9%
Flight and accommodation (half board)	21.5%	17.8%	17.8%	14.2%	17.6%
Flight and accommodation (full board)	8.6%	9.9%	8.7%	10.3%	9.7%
Flight and accommodation (all inclusive)	40.3%	39.5%	44.3%	47.5%	45.8%
% Tourists using low-cost airlines	52.0%	51.2%	56.9%	65.3%	65.2%
Other expenses in their place of residence:					
- Car rental	21.1%	26.4%	24.4%	23.8%	25.4%
- Sporting activities	7.6%	8.7%	7.3%	8.0%	10.8%
- Excursions	12.6%	16.6%	15.7%	14.9%	15.3%
- Trip to other islands	1.7%	1.8%	1.1%	1.6%	2.0%

(*) 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.

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	40.8%	31.6%	36.6%	34.3%	32.1%
- Tour Operator's website	70.8%	74.5%	80.1%	80.7%	77.4%
Accommodation	11.6%	18.1%	14.2%	13.5%	17.3%
- Accommodation's website	80.0%	82.3%	85.4%	85.5%	89.2%
Travel agency (High street)	20.2%	24.2%	22.6%	24.4%	28.1%
Online Travel Agency (OTA)	21.4%	21.0%	22.1%	22.9%	19.9%
No need to book accommodation	6.1%	5.1%	4.6%	4.8%	2.7%

Flight booking

	2012	2013	2014	2015	2016
Tour Operator	43.8%	35.0%	36.8%	37.1%	34.2%
- Tour Operator's website	69.2%	74.2%	77.2%	77.4%	76.7%
Airline	19.2%	25.4%	22.1%	22.3%	24.4%
- Airline's website	94.8%	97.1%	98.9%	97.4%	97.2%
Travel agency (High street)	21.2%	24.0%	23.4%	25.1%	28.0%
Online Travel Agency (OTA)	15.8%	15.6%	17.7%	15.5%	13.3%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	7.7%	8.3%	8.4%	7.9%	6.8%
4* Hotel	45.0%	47.6%	46.5%	46.8%	45.8%
1-2-3* Hotel	17.5%	15.2%	17.1%	16.3%	22.2%
Apartment	24.3%	24.7%	22.8%	25.1%	22.6%
Property (privately-owned, friends, family)	4.4%	3.1%	3.7%	2.9%	1.8%
Others	1.2%	1.0%	1.6%	1.0%	0.8%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	53.3%	50.7%	51.9%	47.6%	50.3%
Percentage of women	46.7%	49.3%	48.1%	52.4%	49.7%

Age

Average age (tourists > 16 years old)	43.6	43.2	44.0	45.2	46.6
Standard deviation	14.7	13.8	14.2	14.0	14.5

Age range (> 16 years old)

16-24 years old	9.6%	7.1%	8.2%	6.6%	6.1%
25-30 years old	16.6%	14.9%	13.6%	12.7%	11.0%
31-45 years old	28.4%	35.9%	33.1%	32.2%	30.8%
46-60 years old	31.2%	29.6%	32.2%	33.1%	32.6%
Over 60 years old	14.2%	12.5%	12.9%	15.3%	19.4%

Occupation

Business owner or self-employed	14.8%	19.8%	16.5%	13.3%	15.8%
Upper/Middle management employee	51.9%	50.9%	55.6%	56.6%	52.9%
Auxiliary level employee	8.2%	10.9%	8.4%	9.2%	7.8%
Students	7.1%	3.7%	4.7%	4.0%	3.2%
Retired	16.4%	13.1%	13.2%	15.1%	19.0%
Unemployed / unpaid dom. work	1.6%	1.5%	1.6%	1.8%	1.3%

Annual household income level

€12,000 - €24,000	20.9%	19.9%	17.3%	16.0%	15.2%
€24,001 - €36,000	22.4%	18.8%	20.9%	23.3%	21.7%
€36,001 - €48,000	20.6%	22.4%	21.1%	19.1%	20.5%
€48,001 - €60,000	13.2%	15.7%	16.2%	17.0%	16.8%
€60,001 - €72,000	7.8%	8.6%	7.0%	8.7%	7.7%
€72,001 - €84,000	5.5%	5.7%	4.8%	4.0%	5.2%
More than €84,000	9.6%	8.8%	12.8%	11.9%	13.0%

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Canary Islands: French market

Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	38,706	62,440	75,683	116,607	129,156
- Fuerteventura	68,612	86,403	83,417	103,746	114,823
- Gran Canaria	32,942	36,148	54,780	73,511	86,135
- Tenerife	124,478	124,104	161,943	156,788	155,759
- La Palma	1,913	3,500	4,238	4,766	9,500

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	14.5%	20.0%	19.9%	25.6%	26.1%
- Fuerteventura	25.7%	27.6%	21.9%	22.8%	23.2%
- Gran Canaria	12.4%	11.6%	14.4%	16.1%	17.4%
- Tenerife	46.7%	39.7%	42.6%	34.4%	31.4%
- La Palma	0.7%	1.1%	1.1%	1.0%	1.9%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	8.0%	11.2%	8.1%	7.2%	6.1%
Only with partner	49.8%	45.5%	43.8%	49.1%	46.7%
Only with children (under the age of 13)	1.1%	1.9%	2.0%	1.8%	1.8%
Partner + children (under the age of 13)	12.2%	14.3%	17.5%	15.8%	15.7%
Other relatives	3.2%	2.9%	4.3%	2.9%	2.8%
Friends	7.7%	7.9%	6.6%	4.7%	5.8%
Work colleagues	0.6%	0.1%	0.2%	0.4%	0.2%
Other combinations ⁽¹⁾	17.4%	16.2%	17.6%	18.1%	20.9%

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

How do they rate the destination?

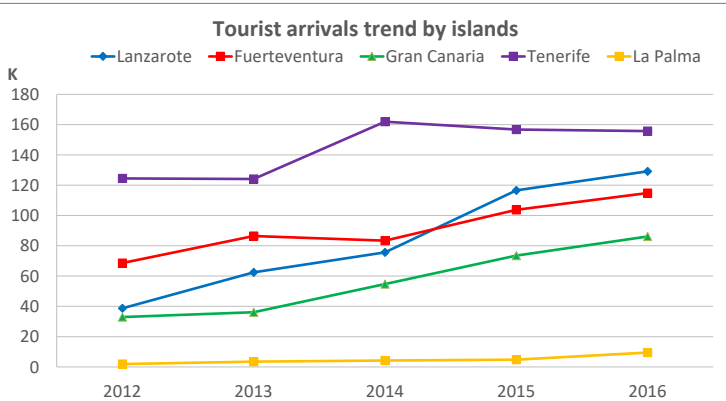
Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	92.4%	91.3%	93.1%	91.2%	94.5%
Average rating (scale 1-10)	8.68	8.65	8.72	8.69	8.81

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	45.4%	49.0%	44.8%	43.8%	50.5%
In love (at least 10 previous visits)	6.9%	5.4%	5.8%	3.8%	5.8%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
France	144,339	81,652	213,063	293,217	223,343
Spanish Mainland	64,608	143,810	103,138	78,666	133,816
Belgium	18,041	17,600	26,544	28,512	48,043
Switzerland	15,025	22,089	14,346	19,622	42,512
Germany	9,050	14,383	8,373	11,474	14,634
United Kingdom	386	1,347	1,757	3,530	2,804
Italy	0	0	646	401	1,326
Norway	0	110	0	0	318
Austria	0	0	0	745	0
Netherlands	193	0	811	736	0



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.

Why do they choose the Canary Islands?

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	92.4%	91.1%	92.1%	91.8%	92.7%
Scenery	33.0%	31.6%	36.0%	34.6%	35.3%
Beaches	34.2%	33.0%	28.7%	29.5%	32.1%
Tranquillity/rest/relaxation	33.9%	33.2%	33.0%	32.1%	30.0%
Visiting new places	19.8%	21.0%	21.4%	22.3%	21.8%
Price	20.3%	19.5%	22.6%	21.9%	18.0%
Security	7.4%	6.8%	6.4%	10.9%	14.2%
Active tourism	7.2%	6.0%	7.0%	8.4%	9.3%
Quality of the environment	5.2%	6.4%	6.8%	5.9%	5.6%
Nautical activities	4.5%	6.3%	5.3%	4.3%	5.2%
Suitable destination for children	3.5%	2.9%	4.7%	4.5%	4.1%
Ease of travel	3.0%	3.8%	4.0%	3.5%	3.3%
Culture	1.6%	1.9%	1.2%	1.7%	2.6%
Nightlife/fun	3.7%	4.0%	3.5%	2.4%	2.2%
Theme parks	1.6%	1.2%	1.8%	1.5%	1.9%
Rural tourism	1.7%	1.5%	2.3%	2.0%	1.7%

* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	39.5%	42.3%	37.2%	36.7%	42.9%
Recommendation by friends or relatives	37.5%	37.3%	37.5%	35.1%	34.5%
The Canary Islands television channel	0.2%	0.0%	0.4%	0.5%	0.2%
Other television or radio channels	0.9%	1.6%	1.7%	1.0%	1.8%
Information in the press/magazines/books	6.8%	7.9%	7.9%	6.2%	4.8%
Attendance at a tourism fair	0.9%	0.6%	0.6%	0.6%	1.2%
Tour Operator's brochure or catalogue	19.2%	15.6%	16.4%	17.7%	16.6%
Recommendation by Travel Agency	13.6%	13.5%	14.6%	16.5%	16.8%
Information obtained via the Internet	29.0%	29.2%	32.6%	31.8%	26.8%
Senior Tourism programme	0.1%	0.2%	0.1%	0.2%	0.0%
Others	5.2%	6.2%	7.3%	4.9%	4.6%

* Multi-choice question

