

# TOURIST PROFILE BY ISLAND OF STAY (2022)

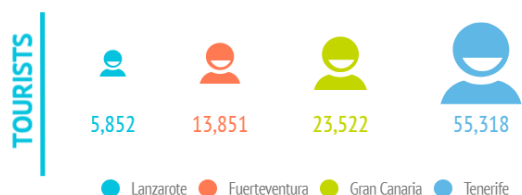
## PORTUGAL



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



	LZ	FUE	GC	TFE	LP
<b>TOURISTS</b>					
<b>Tourist arrivals (FRONTUR)</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>	<b>n.a.</b>
<b>Tourist arrivals &gt; 15 years old (EGT)</b>	<b>5,852</b>	<b>13,851</b>	<b>23,522</b>	<b>55,318</b>	<b>--</b>
- book holiday package	1,840	6,330	8,564	27,299	--
- do not book holiday package	4,012	7,521	14,958	28,019	--
- % tourists who book holiday package	31.4%	45.7%	36.4%	49.3%	--



	LZ	FUE	GC	TFE	LP
<b>Expenditure per tourist (€)</b>	--	--	<b>1,082</b>	<b>899</b>	--
- book holiday package	--	--	1,218	1,115	--
- holiday package	--	--	1,017	900	--
- others	--	--	201	214	--
- do not book holiday package	--	--	1,004	689	--
- flight	--	--	236	171	--
- accommodation	--	--	410	239	--
- others	--	--	358	279	--
<b>Average lenght of stay</b>	--	--	<b>7.34</b>	<b>7.27</b>	--
- book holiday package	--	--	7.19	6.59	--
- do not book holiday package	--	--	7.43	7.93	--
<b>Average daily expenditure (€)</b>	--	--	<b>151.9</b>	<b>134.7</b>	--
- book holiday package	--	--	187.0	172.6	--
- do not book holiday package	--	--	131.9	97.8	--
<b>Total turnover (&gt; 15 years old) (€m)</b>	--	--	<b>25</b>	<b>50</b>	--
- book holiday package	--	--	10	30	--
- do not book holiday package	--	--	15	19	--

### Where did they spend their main holiday last year?\*

	LZ	FUE	GC	TFE	LP
Didn't have holidays	--	--	36.3%	26.2%	--
Canary Islands	--	--	11.5%	6.6%	--
Other destination	--	--	52.2%	67.3%	--

### What other destinations did they consider for this trip?\*

	LZ	FUE	GC	TFE	LP
None (I was clear about "this Canary Island")	--	--	26.7%	17.8%	--
Canary Islands (other island)	--	--	22.4%	20.1%	--
Other destination	--	--	50.8%	62.1%	--

\*Percentage of valid answers

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.

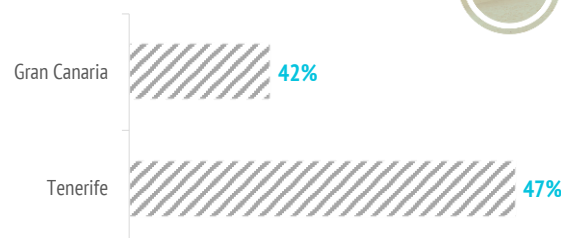
### Importance of each factor in the destination choice



	LZ	FUE	GC	TFE	LP
Climate	--	--	56.1%	62.7%	--
Sea	--	--	44.8%	47.6%	--
Beaches	--	--	41.9%	46.9%	--
Tranquility	--	--	49.5%	43.1%	--
European belonging	--	--	52.6%	45.4%	--
Safety	--	--	47.3%	41.2%	--
Landscapes	--	--	24.8%	38.1%	--
Price	--	--	26.4%	34.2%	--
Accommodation supply	--	--	30.7%	29.6%	--
Effortless trip	--	--	41.0%	24.2%	--
Environment	--	--	20.0%	27.5%	--
Fun possibilities	--	--	22.9%	25.7%	--
Authenticity	--	--	19.7%	19.9%	--
Gastronomy	--	--	20.1%	19.1%	--
Exoticism	--	--	7.0%	16.5%	--
Hiking trail network	--	--	8.1%	13.7%	--
Nightlife	--	--	16.9%	9.2%	--
Shopping	--	--	15.7%	8.5%	--
Historical heritage	--	--	7.1%	11.3%	--
Culture	--	--	5.9%	10.4%	--

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 BEACHES



### What is the main motivation for their holidays?



	LZ	FUE	GC	TFE	LP
Rest	--	--	43.2%	38.7%	--
Enjoy family time	--	--	27.3%	20.4%	--
Have fun	--	--	15.3%	5.8%	--
Explore the destination	--	--	8.7%	34.2%	--
Practice their hobbies	--	--	2.0%	--	--
Other reasons	--	--	3.5%	0.9%	--

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



	LZ	FUE	GC	TFE	LP
The same day	--	--	1.1%	--	--
Between 1 and 30 days	--	--	35.5%	37.8%	--
Between 1 and 2 months	--	--	35.1%	27.4%	--
Between 3 and 6 months	--	--	23.1%	30.2%	--
More than 6 months	--	--	5.1%	4.5%	--

## TOURIST PROFILE BY ISLAND OF STAY (2022)

## PORTUGAL



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

	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	--	--	31.6%	22.8%	--
Friends or relatives	--	--	25.3%	26.6%	--
Internet or social media	--	--	56.2%	55.5%	--
Mass Media	--	--	2.7%	0.0%	--
Travel guides and magazines	--	--	2.3%	5.7%	--
Travel Blogs or Forums	--	--	8.3%	9.2%	--
Travel TV Channels	--	--	0.0%	0.0%	--
Tour Operator or Travel Agency	--	--	17.8%	29.0%	--
Public administrations or similar	--	--	0.0%	0.7%	--
Others	--	--	3.8%	4.7%	--

\* Multi-choice question

## With whom did they book their flight and accommodation?

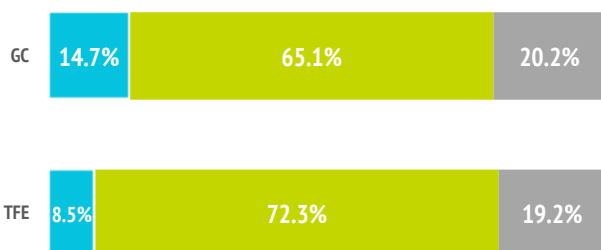
	LZ	FUE	GC	TFE	LP
<b>Flight</b>					
- Directly with the airline	--	--	49.8%	40.1%	--
- Tour Operator or Travel Agency	--	--	50.2%	59.9%	--
<b>Accommodation</b>					
- Directly with the accommodation	--	--	39.2%	27.6%	--
- Tour Operator or Travel Agency	--	--	60.8%	72.4%	--

## Where do they stay?

	LZ	FUE	GC	TFE	LP
1-2-3* Hotel	--	--	13.8%	12.7%	--
4* Hotel	--	--	40.0%	49.8%	--
5* Hotel / 5* Luxury Hotel	--	--	11.3%	9.8%	--
Aparthotel / Tourist Villa	--	--	14.7%	8.5%	--
House/room rented in a private dwelling	--	--	4.1%	4.3%	--
Private accommodation (1)	--	--	15.2%	10.0%	--
Others (Cottage, cruise, camping,...)	--	--	0.9%	5.0%	--

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

■ Aparthotel / Tourist Villa ■ Hotels ■ Others



## What do they book?

	LZ	FUE	GC	TFE	LP
Room only	--	--	18.3%	12.8%	--
Bed and Breakfast	--	--	13.2%	11.6%	--
Half board	--	--	22.4%	25.5%	--
Full board	--	--	4.5%	7.4%	--
All inclusive	--	--	41.6%	42.8%	--

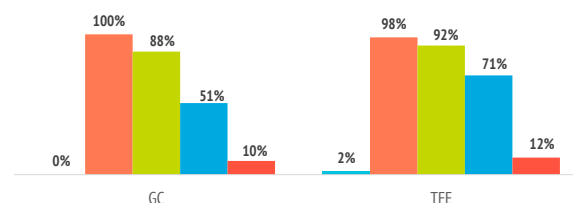
## Other expenses

	LZ	FUE	GC	TFE	LP
Restaurants or cafes	--	--	53.8%	56.1%	--
Supermarkets	--	--	52.2%	43.7%	--
Car rental	--	--	36.4%	47.9%	--
Organized excursions	--	--	14.3%	22.3%	--
Taxi, transfer, chauffeur service	--	--	40.7%	39.6%	--
Theme Parks	--	--	5.4%	24.3%	--
Sport activities	--	--	4.6%	7.1%	--
Museums	--	--	2.6%	4.7%	--
Flights between islands	--	--	3.2%	2.6%	--

## Activities in the Canary Islands

	LZ	FUE	GC	TFE	LP
Outdoor time per day					
0 hours	--	--	--	2.2%	--
1 - 2 hours	--	--	12.3%	5.8%	--
3 - 6 hours	--	--	36.8%	21.2%	--
7 - 12 hours	--	--	41.2%	58.7%	--
More than 12 hours	--	--	9.8%	12.1%	--

■ 0 hours ■ More than 1 hour ■ More than 3 hours ■ More than 7 hours ■ More than 12 hours

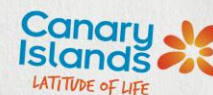


	LZ	FUE	GC	TFE	LP
Beach	--	--	77.7%	80.0%	--
Walk, wander	--	--	79.3%	71.1%	--
Swimming pool, hotel facilities	--	--	69.5%	66.4%	--
Explore the island on their own	--	--	53.2%	65.0%	--
Hiking	--	--	24.8%	35.9%	--
Taste Canarian gastronomy	--	--	28.8%	28.2%	--
Theme parks	--	--	20.6%	31.8%	--
Nightlife / concerts / shows	--	--	22.1%	18.1%	--
Museums / exhibitions	--	--	10.9%	11.1%	--
Organized excursions	--	--	8.1%	15.9%	--
Other Nature Activities	--	--	14.0%	8.2%	--
Wineries / markets / popular festivals	--	--	6.1%	11.0%	--
Sea excursions / whale watching	--	--	6.1%	9.7%	--
Swim	--	--	1.8%	6.3%	--
Running	--	--	2.6%	5.7%	--
Astronomical observation	--	--	2.5%	3.4%	--
Beauty and health treatments	--	--	1.6%	4.2%	--
Surf	--	--	2.2%	3.6%	--
Scuba Diving	--	--	1.2%	3.6%	--
Practice other sports	--	--	2.6%	1.7%	--
Cycling / Mountain bike	--	--	2.8%	0.5%	--
Golf	--	--	0.0%	2.0%	--
Windsurf / Kitesurf	--	--	0.0%	0.0%	--

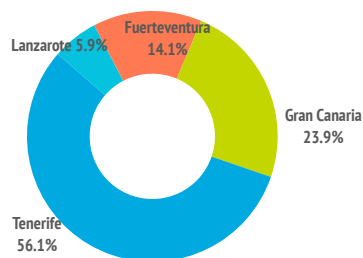
\* Multi-choice question

# TOURIST PROFILE BY ISLAND OF STAY (2022)

## PORTUGAL



### Which island do they choose?



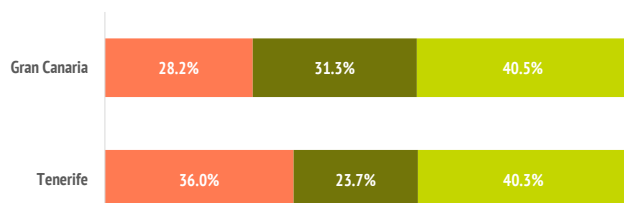
### How many islands do they visit during their trip?

	LZ	FUE	GC	TFE	LP
One island	--	--	86.5%	95.4%	--
Two islands	--	--	13.5%	3.7%	--
Three or more islands	--	--	--	0.9%	--

### Sustainable destination

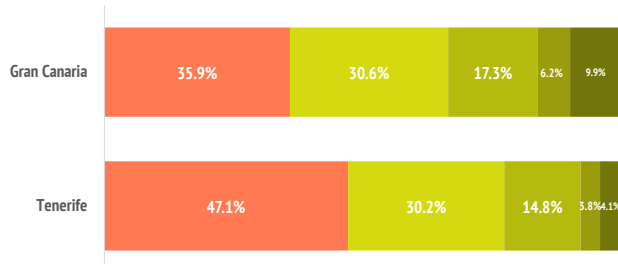
When booking a trip, do they tend to choose the most sustainable options?

■ No ■ Yes, even if it means some inconvenience (price, time, hassle, etc) ■ Yes, but only if it is not inconvenient



Would they be willing to spend more on travel to reduce their carbon footprint?

■ No ■ Yes, up to 5% more ■ Yes, up to 10% more ■ Yes, up to 20% more ■ Yes, over 20% more

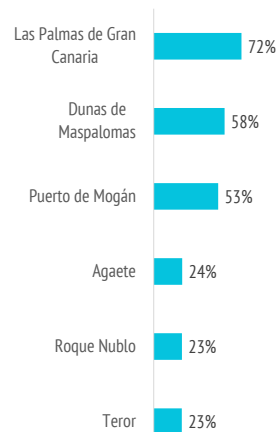


Perception during their stay*	LZ	FUE	GC	TFE	LP
Quality of life on the island	--	--	7.63	8.19	--
Tolerance towards tourism	--	--	8.42	8.64	--
Cleanliness of the island	--	--	7.48	8.04	--
Air quality	--	--	8.16	8.31	--
Rational water consumption	--	--	7.27	7.37	--
Energy saving	--	--	6.97	7.01	--
Use of renewable energy	--	--	7.55	7.21	--
Recycling	--	--	6.87	7.37	--
Easy to get around by public transport	--	--	7.72	7.42	--
Overcrowding in tourist areas	--	--	7.30	7.19	--
Supply of local products	--	--	7.26	7.47	--

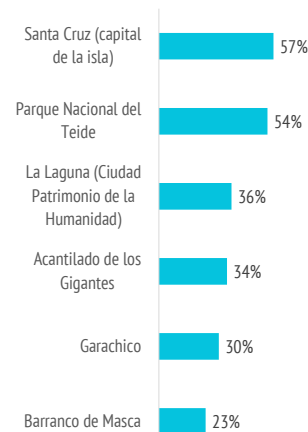
\* Scale 0 - 10 (0 = Not important and 10 = Very important)

### Which is the most visited place on each island?

#### GRAN CANARIA



#### TENERIFE



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)	LZ	FUE	GC	TFE	LP
Average rating	--	--	8.40	8.41	--

Experience in the Canary Islands	LZ	FUE	GC	TFE	LP
Worse or much worse than expected	--	--	6.8%	7.5%	--
Lived up to expectations	--	--	56.5%	44.9%	--
Better or much better than expected	--	--	36.7%	47.6%	--

Future intentions (scale 1-10)	LZ	FUE	GC	TFE	LP
Return to the Canary Islands	--	--	7.74	8.06	--
Recommend visiting the Canary Islands	--	--	8.24	8.46	--

### How many are loyal to the Canary Islands?

	LZ	FUE	GC	TFE	LP
Repeat tourists of the island	--	--	34.1%	36.6%	--
At least 10 previous visits	--	--	6.2%	0.6%	--
Repeat tourists	--	--	44.7%	41.4%	--
At least 10 previous visits	--	--	6.2%	3.6%	--

### REPEAT TOURIST OF EACH ISLAND



34.1%  
Gran Canaria



36.6%  
Tenerife

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## PORTUGAL

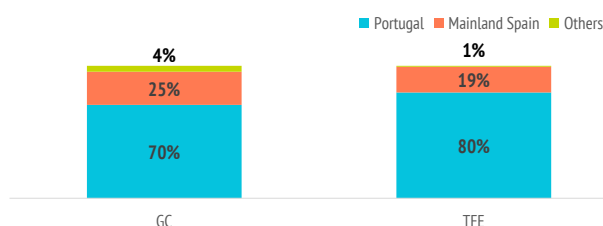


### Where does the flight come from?



	LZ	FUE	GC	TFE	LP
Portugal	--	--	70.5%	79.9%	--
Mainland Spain	--	--	25.1%	19.4%	--
France	--	--	--	0.7%	--
Netherlands	--	--	2.2%	--	--
Sweden	--	--	1.3%	--	--
Germany	--	--	1.0%	--	--

### SHARE OF TOURIST BY ORIGIN OF THE FLIGHT



### Who do they come with?



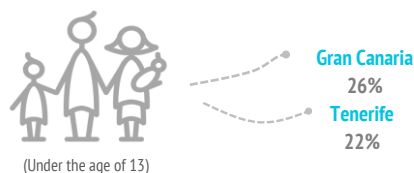
	LZ	FUE	GC	TFE	LP
Unaccompanied	--	--	17.1%	6.3%	--
Only with partner	--	--	41.0%	43.8%	--
Only with children (< 13 years old)	--	--	8.3%	7.0%	--
Partner + children (< 13 years old)	--	--	5.7%	10.1%	--
Other relatives	--	--	8.0%	8.8%	--
Friends	--	--	5.8%	7.9%	--
Work colleagues	--	--	0.0%	0.9%	--
Organized trip	--	--	0.0%	0.0%	--
Other combinations <sup>(1)</sup>	--	--	14.1%	15.1%	--

(1) Different situations have been isolated

<b>Tourists with children</b>	--	--	<b>25.7%</b>	<b>21.8%</b>	--
- Between 0 and 2 years old	--	--	2.0%	1.7%	--
- Between 3 and 12 years old	--	--	20.8%	19.8%	--
- Between 0-2 and 3-12 years	--	--	2.9%	0.4%	--
<b>Tourists without children</b>	--	--	<b>74.3%</b>	<b>78.2%</b>	--
<b>Group composition:</b>					
- 1 person	--	--	19.4%	9.4%	--
- 2 people	--	--	36.8%	49.4%	--
- 3 people	--	--	18.5%	20.0%	--
- 4 or 5 people	--	--	17.4%	19.6%	--
- 6 or more people	--	--	7.8%	1.7%	--
<b>Average group size:</b>	--	--	<b>2.81</b>	<b>2.65</b>	--

\*People who share the main expenses of the trip

### TOURIST TRAVELLING WITH CHILDREN



### Who are they?



	LZ	FUE	GC	TFE	LP
<b>Gender</b>					
Men	--	--	59.2%	52.2%	--
Women	--	--	40.8%	47.8%	--
<b>Age</b>					
Average age (tourist > 15 years old)	--	--	41.4	37.8	--
Standard deviation	--	--	12.5	12.0	--
<b>Age range (&gt; 15 years old)</b>					
16 - 24 years old	--	--	7.2%	11.7%	--
25 - 30 years old	--	--	15.5%	20.0%	--
31 - 45 years old	--	--	45.3%	46.8%	--
46 - 60 years old	--	--	20.5%	14.3%	--
Over 60 years old	--	--	11.5%	7.2%	--
<b>Occupation</b>					
Salaried worker	--	--	43.7%	48.0%	--
Self-employed	--	--	19.8%	22.6%	--
Unemployed	--	--	0.0%	1.4%	--
Business owner	--	--	22.6%	19.0%	--
Student	--	--	2.6%	3.4%	--
Retired	--	--	7.4%	3.5%	--
Unpaid domestic work	--	--	0.6%	0.0%	--
Others	--	--	3.3%	2.1%	--
<b>Annual household income level</b>					
Less than €25,000	--	--	33.2%	34.2%	--
€25,000 - €49,999	--	--	35.3%	42.4%	--
€50,000 - €74,999	--	--	22.2%	15.9%	--
More than €74,999	--	--	9.3%	7.4%	--
<b>Education level</b>					
No studies	--	--	1.3%	1.4%	--
Primary education	--	--	0.0%	0.9%	--
Secondary education	--	--	34.4%	27.7%	--
Higher education	--	--	64.3%	69.9%	--



AVERAGE AGE  
(> 15 years old)

Gran Canaria

Tenerife

41

38

### % OF TOURISTS WITH INCOMES OVER €74,999

Gran Canaria  
Tenerife



9%



7%

### % OF TOURISTS TRAVEL ONLY WITH PARTNER

Gran Canaria

Tenerife



41%

44%

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.