

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



	2022Q1	2022Q2	2022Q3	2022Q4	2022
TOURISTS					
Tourist arrivals (FRONTUR) (*)	1.36	1.38	1.45	1.63	5.82
Tourist arrivals > 15 years old (EGT) $(*)$	1.22	1.21	1.21	1.44	5.08
<ul><li>book holiday package (*)</li></ul>	0.50	0.53	0.55	0.64	2.23
- do not book holiday package (*)	0.72	0.68	0.66	0.80	2.86
- % tourists who book holiday package	41.1%	44.0%	45.4%	44.5%	43.8%

(\*) Million of tourists









202202 1,362,404

1,375,489

202203 1,452,981 1,630,769

202204

#### % TOURISTS WHO BOOK HOLIDAY PACKAGE

2022Q1	8	0	8		8	9	8	ê	å	ê	41%
2022Q2	8	0	0	0	8	9	ê	ê	9	ê	44%
2022Q3	8	8			8	ê	ê		å		45%
2022Q4	0		0	0	8	8	å	å	8	ê	44%

2022Q1	2022Q2	2022Q3	2022Q4	2022
1,242	1,241	1,523	1,315	1,330
1,430	1,414	1,681	1,541	1,520
1,163	1,120	1,351	1,230	1,219
267	294	330	310	302
1,111	1,106	1,391	1,134	1,181
292	289	402	303	320
395	378	474	379	405
423	439	515	453	456
9.53	8.69	9.33	8.85	9.09
8.28	7.91	8.24	8.04	8.11
10.40	9.29	10.23	9.50	9.85
151.3	160.6	183.4	169.5	166.3
182.4	186.7	211.9	202.4	196.5
129.6	140.1	159.6	143.2	142.9
1,514	1,503	1,848	1,893	6,758
717	754	926	986	3,382
798	750	921	907	3,376
	1,242 1,430 1,163 267 1,111 292 395 423 9.53 8.28 10.40 151.3 182.4 129.6 1,514 717	1,242 1,241 1,430 1,414 1,163 1,120 267 294 1,111 1,106 292 289 395 378 423 439 9.53 8.69 8.28 7.91 10.40 9.29 151.3 160.6 182.4 186.7 129.6 140.1 1,514 1,503 717 754	1,242     1,241     1,523       1,430     1,414     1,681       1,163     1,120     1,351       267     294     330       1,111     1,106     1,391       292     289     402       395     378     474       423     439     515       9.53     8.69     9.33       8.28     7.91     8.24       10.40     9.29     10.23       151.3     160.6     183.4       182.4     186.7     211.9       129.6     140.1     159.6       1,514     1,503     1,848       717     754     926	1,242       1,241       1,523       1,315         1,430       1,414       1,681       1,541         1,163       1,120       1,351       1,230         267       294       330       310         1,111       1,106       1,391       1,134         292       289       402       303         395       378       474       379         423       439       515       453         9.53       8.69       9.33       8.85         8.28       7.91       8.24       8.04         10.40       9.29       10.23       9.50         151.3       160.6       183.4       169.5         182.4       186.7       211.9       202.4         129.6       140.1       159.6       143.2         1,514       1,503       1,848       1,893         717       754       926       986

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

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Didn't have holidays	32.9%	37.0%	35.3%	24.3%	31.9%
Canary Islands	17.6%	17.5%	17.4%	22.1%	18.9%
Other destination	49.5%	45.5%	47.3%	53.6%	49.3%

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

	2022Q1	2022Q2	2022Q3	2022Q4	2022
None (I was clear about "this Canary Island")	37.0%	28.9%	20.4%	32.7%	29.2%
Canary Islands (other island)	26.8%	22.3%	18.5%	23.8%	22.5%
Other destination	36.2%	48.8%	61.1%	43.6%	48.3%

### Source: Encuesta sobre el Gasto Turístico (ISTAC).

\*Percentage of valid answers

#### Importance of each factor in the destination choice

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	2022Q1	2022Q2	2022Q3	2022Q4	2022
Climate	81.6%	72.5%	64.5%	76.2%	73.8%
Safety	48.4%	50.1%	53.5%	48.3%	50.0%
Tranquility	42.1%	43.8%	44.8%	43.0%	43.4%
Accommodation supply	36.4%	42.5%	45.2%	39.7%	40.9%
Sea	41.8%	38.5%	40.2%	42.2%	40.8%
Landscapes	38.9%	39.5%	34.7%	37.1%	37.5%
Effortless trip	35.9%	36.3%	37.3%	34.8%	36.0%
Price	31.4%	36.7%	40.9%	34.9%	35.9%
Environment	36.8%	37.4%	34.6%	34.8%	35.8%
European belonging	39.3%	34.6%	32.7%	34.9%	35.3%
Beaches	30.4%	30.6%	33.9%	31.5%	31.6%
Gastronomy	26.5%	26.2%	26.6%	27.1%	26.6%
Fun possibilities	20.0%	24.2%	33.3%	23.1%	25.1%
Authenticity	21.1%	22.2%	23.8%	21.0%	22.0%
Exoticism	10.8%	12.2%	14.3%	11.9%	12.3%
Hiking trail network	14.0%	12.2%	7.9%	12.9%	11.8%
Shopping	7.2%	8.9%	11.1%	9.5%	9.2%
Culture	8.6%	8.6%	10.0%	9.1%	9.1%
Historical heritage	7.5%	8.9%	9.5%	8.5%	8.6%
Nightlife	5.9%	7.7%	10.3%	7.6%	7.9%

 $\textit{Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important", "Very$ % of tourists who indicate that the factor is "very important" in their choice.

#### % TOURISTS WHO CHOOSE FUN POSSIBILITIES



2022Q2

24.2%





2022Q3 33.3%

2022Q4 23.1%

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

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	2022Q1	2022Q2	2022Q3	2022Q4	2022
Rest	50.3%	49.2%	41.8%	47.8%	47.3%
Enjoy family time	15.5%	14.7%	20.8%	17.5%	17.2%
Have fun	7.9%	8.7%	11.8%	8.0%	9.0%
Explore the destination	21.3%	23.9%	23.3%	22.9%	22.9%
Practice their hobbies	2.5%	1.6%	0.8%	1.6%	1.7%
Other reasons	2.5%	1.8%	1.4%	2.2%	2.0%

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

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	2022Q1	2022Q2	2022Q3	2022Q4	2022
The same day	0.6%	0.7%	0.8%	0.5%	0.7%
Between 1 and 30 days	33.2%	24.6%	19.6%	23.1%	25.1%
Between 1 and 2 months	28.7%	27.4%	20.5%	26.5%	25.8%
Between 3 and 6 months	24.7%	30.8%	34.2%	30.8%	30.2%
More than 6 months	12.8%	16.4%	24.9%	19.2%	18.3%

#### % TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



2022Q1	/////// 12.8%
2022Q2	////////// 16.4%
2022Q3	///////////////////////////////////////
2022Q4	////////////// 19.2%



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

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Previous visits to the Canary Islands	52.0%	50.8%	44.3%	50.3%	49.4%
Friends or relatives	33.1%	33.0%	36.1%	34.5%	34.2%
Internet or social media	53.2%	54.2%	58.2%	52.3%	54.4%
Mass Media	1.8%	1.5%	3.1%	2.9%	2.3%
Travel guides and magazines	7.8%	8.3%	7.6%	6.7%	7.6%
Travel Blogs or Forums	8.3%	7.6%	8.4%	7.1%	7.8%
Travel TV Channels	0.7%	0.4%	0.8%	1.0%	0.7%
Tour Operator or Travel Agency	19.2%	20.5%	20.5%	19.3%	19.8%
Public administrations or similar	2.0%	1.5%	1.2%	1.5%	1.6%
Others	2.6%	3.3%	3.4%	4.5%	3.5%

<sup>\*</sup> Multi-choise question

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

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Flight					
- Directly with the airline	56.9%	54.0%	52.0%	51.2%	53.4%
- Tour Operator or Travel Agency	43.1%	46.0%	48.0%	48.8%	46.6%
Accommodation					
- Directly with the accommodation	41.8%	38.6%	38.7%	37.6%	39.1%
- Tour Operator or Travel Agency	58.2%	61.4%	61.3%	62.4%	60.9%

#### Where do they stay?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
1-2-3* Hotel	9.3%	7.9%	7.1%	8.4%	8.2%
4* Hotel	36.2%	40.4%	40.0%	36.9%	38.3%
5* Hotel / 5* Luxury Hotel	9.5%	14.0%	15.0%	12.3%	12.7%
Aparthotel / Tourist Villa	14.7%	15.4%	16.1%	15.0%	15.3%
House/room rented in a private dwelling	11.5%	6.8%	6.4%	8.2%	8.2%
Private accommodation (1)	10.8%	7.8%	9.0%	10.1%	9.5%
Others (Cottage, cruise, camping,)	8.0%	7.7%	6.4%	9.1%	7.9%
Others (Cottage, cruise, camping,)	8.0%	7.7%	6.4%	9.1%	7.9%

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

#### What do they book?

	202201	202202	202202	202204	2022
	2022Q1	2022Q2	2022Q3	2022Q4	2022
Room only	33.7%	27.1%	24.5%	29.3%	28.6%
Bed and Breakfast	17.5%	17.7%	15.1%	18.0%	17.1%
Half board	21.5%	25.5%	22.1%	20.5%	22.3%
Full board	2.8%	3.7%	4.4%	3.3%	3.5%
All inclusive	24.6%	26.1%	33.9%	28.9%	28.4%



## 28.6% of turists book room only



**33.7%** 202201



**24.5%** 2022Q3



27.1% 2022Q2



**29.3%** 2022Q4

#### Other expenses

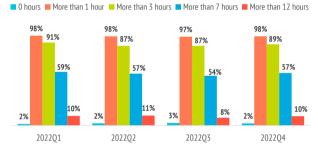
	2022Q1	2022Q2	2022Q3	2022Q4	TOTAL
Restaurants or cafes	72.4%	72.3%	68.4%	72.3%	71.4%
Supermarkets	56.2%	54.0%	59.6%	56.2%	56.5%
Car rental	37.1%	38.5%	38.0%	36.8%	37.5%
Organized excursions	23.1%	29.2%	36.7%	29.0%	29.5%
Taxi, transfer, chauffeur service	46.7%	51.5%	51.3%	50.9%	50.2%
Theme Parks	10.8%	19.0%	30.9%	17.5%	19.4%
Sport activities	6.7%	8.0%	11.1%	9.6%	8.9%
Museums	3.2%	3.4%	4.0%	3.8%	3.6%
Flights between islands	4.4%	4.7%	4.6%	4.2%	4.4%

#### Activities in the Canary Islands

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Outdoor time per day	2022Q1	2022Q2	2022Q3	2022Q4	2022
0 hours	1.6%	2.4%	2.7%	2.3%	2.3%
1 - 2 hours	7.6%	10.5%	10.1%	8.8%	9.2%
3 - 6 hours	32.1%	30.4%	32.8%	31.5%	31.7%
7 - 12 hours	48.3%	45.9%	0.0%	47.3%	46.9%
More than 12 hours	10.4%	10.8%	8.5%	10.2%	10.0%



Activities in the Canary Islands	2022Q1	2022Q2	2022Q3	2022Q4	2022
Walk, wander	80.6%	79.0%	77.6%	79.8%	79.3%
Beach	63.9%	64.4%	74.7%	66.2%	67.3%
Swimming pool, hotel facilities	54.4%	63.8%	74.3%	63.1%	63.8%
Explore the island on their own	51.5%	49.1%	53.0%	50.7%	51.0%
Taste Canarian gastronomy	30.7%	30.0%	30.9%	29.4%	30.2%
Theme parks	14.8%	22.7%	36.8%	20.4%	23.5%
Organized excursions	15.9%	21.3%	28.0%	20.6%	21.4%
Hiking	24.6%	19.8%	17.5%	19.7%	20.4%
Sea excursions / whale watching	11.8%	17.3%	24.6%	16.3%	17.5%
Nightlife / concerts / shows	12.0%	15.8%	20.8%	17.5%	16.6%
Swim	14.4%	7.2%	10.4%	7.5%	9.8%
Other Nature Activities	8.6%	8.6%	9.5%	8.9%	8.9%
Wineries / markets / popular festiv	6.8%	8.0%	10.5%	8.9%	8.5%
Museums / exhibitions	6.8%	6.5%	8.6%	8.4%	7.6%
Beauty and health treatments	5.3%	7.0%	7.0%	7.1%	6.6%
Running	6.2%	4.9%	4.5%	4.8%	5.1%
Practice other sports	4.4%	4.0%	5.3%	4.2%	4.5%
Astronomical observation	3.4%	3.7%	5.2%	4.7%	4.3%
Scuba Diving	2.0%	2.2%	5.2%	2.6%	3.0%
Golf	2.2%	2.0%	2.8%	2.9%	2.5%
Surf	2.8%	2.3%	2.6%	2.3%	2.5%
Cycling / Mountain bike	2.4%	2.0%	0.8%	1.5%	1.7%
Windsurf / Kitesurf	1.2%	0.6%	1.2%	0.8%	0.9%
* Multi-choise question					

<sup>\*</sup> Multi-choise question

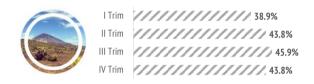


#### Which places do they visit in Lanzarote?

	I Trim	II Trim	III Trim	IV Trim	2022
Teide National Park	38.9%	43.8%	45.9%	43.8%	43.1%
Santa Cruz	33.2%	34.3%	37.5%	35.6%	35.2%
La Laguna	23.4%	23.4%	25.9%	23.6%	24.0%
Los Gigantes Cliffs	20.5%	23.9%	26.4%	22.0%	23.1%
Garachico	19.4%	22.4%	24.0%	20.7%	21.6%
La Orotava	18.3%	19.3%	19.1%	19.1%	19.0%
Icod de los Vinos	13.4%	14.1%	15.4%	14.2%	14.3%
Anaga rural park	14.5%	13.1%	12.7%	13.6%	13.5%
Barranco de Masca	13.1%	13.2%	12.2%	11.2%	12.4%
Teno / Buenavista	8.8%	6.7%	6.8%	6.7%	7.2%
Barranco del Infierno	3.4%	3.1%	3.2%	3.1%	3.2%

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# 4 in 10 tourists in Tenerife visit Teide National Park



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

	I Trim	II Trim	III Trim	IV Trim	2022
Tenerife: Repeat tourists	65.6%	61.7%	56.5%	62.9%	61.8%
Tenerife: At least 10 previous visits	11.2%	10.0%	7.2%	10.1%	9.6%
Canary Islands: Repeat tourists	70.6%	67.0%	61.7%	67.8%	66.8%
Canary Islands: At least 10 previous vis	19.9%	16.2%	13.6%	17.5%	16.8%

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

	I Trim	II Trim	III Trim	IV Trim	2022
One island	93.4%	93.2%	93.0%	93.8%	93.4%
Two islands	5.4%	5.9%	6.3%	5.2%	5.7%
Three or more islands	1.2%	0.9%	0.7%	1.0%	0.9%

#### % TOURISTS VISITING MORE THAN ONE ISLAND



#### How do they rate the Canary Islands?

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Satisfaction (scale 0-10)	I Trim	II Trim	III Trim	IV Trim	2022
Average rating	8.84	8.93	8.80	8.85	8.86
Experience in the Canary Islands	l Trim	II Trim	III Trim	IV Trim	2022
Worse or much worse than expected	2.8%	2.0%	3.6%	2.9%	2.8%
Lived up to expectations	51.9%	50.4%	51.9%	49.6%	50.9%
Better or much better than expected	45.4%	47.6%	44.5%	47.6%	46.3%
Future intentions (scale 1-10)	I Trim	II Trim	III Trim	IV Trim	2022
Return to the Canary Islands	8.90	8.91	8.64	8.83	8.82
Recommend visiting the Canary Islands	9.12	9.16	8.98	9.04	9.07

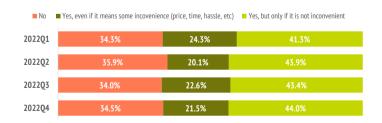
# 65.6% 62.9% 2022 56.5% 61.8%

III Trim

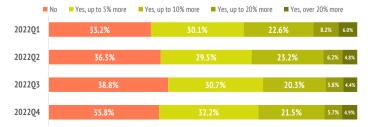
IV Trim

#### Sustainable destination

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



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



Rate your perception of the following sustainability measures during your stay in the Canary Islands

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REPEAT TOURISTS

1 Trim

Perception during their stay*	2022Q1	2022Q2	2022Q3	2022Q4	2022
Quality of life on the island	8.1	8.1	8.1	8.1	8.1
Tolerance towards tourism	8.5	8.6	8.6	8.5	8.5
Cleanliness of the island	8.3	8.4	8.2	8.3	8.3
Air quality	8.4	8.6	8.4	8.4	8.4
Rational water consumption	7.3	7.5	7.6	7.4	7.5
Energy saving	6.8	6.9	6.9	6.9	6.9
Use of renewable energy	6.9	6.9	6.9	6.9	6.9
Recycling	7.1	7.2	7.2	7.1	7.1
Easy to get around by public transport	7.4	7.3	7.5	7.4	7.4
Overcrowding in tourist areas	6.8	6.7	6.8	6.7	6.7
Supply of local products	7.1	7.2	7.3	7.2	7.2

<sup>\*</sup> Scale 0 - 10 (0 = Not important and 10 = Very important)



#### Where are they from?



#### Who are they?



	2022Q1	2022Q2	2022Q3	2022Q4	2022
United Kingdom	35.1%	41.0%	41.1%	37.1%	38.5%
Spanish Mainland	10.6%	15.8%	18.5%	11.9%	14.1%
Germany	12.1%	9.9%	8.3%	12.9%	10.9%
France	5.9%	5.2%	5.1%	5.5%	5.5%
Italy	5.0%	5.2%	4.9%	4.9%	5.0%
Belgium	4.3%	3.7%	4.5%	4.0%	4.1%
Netherlands	4.1%	3.7%	3.7%	3.5%	3.7%
Ireland	3.2%	3.0%	3.3%	2.7%	3.1%
Poland	2.4%	1.9%	2.1%	1.4%	1.9%
Denmark	2.5%	1.5%	0.7%	2.5%	1.8%
Portugal	0.7%	1.0%	1.5%	1.2%	1.1%
Norway	1.8%	0.5%	0.0%	1.8%	1.1%
Sweden	1.9%	0.5%	0.0%	1.5%	1.0%
Switzerland	0.8%	1.2%	0.8%	1.2%	1.0%
Finland	1.3%	0.4%	0.0%	2.0%	1.0%
Austria	1.2%	0.7%	1.0%	0.7%	0.9%
Czech Republic	1.0%	0.8%	0.8%	0.9%	0.9%
Others	6.0%	4.0%	3.8%	4.2%	4.5%

Who do they come with?	Who	do	thev	come	with?
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2022

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Unaccompanied	8.7%	8.6%	6.8%	9.7%	8.5%
Only with partner	50.4%	48.9%	41.8%	48.0%	47.3%
Only with children (< 13 years old)	4.9%	4.1%	6.2%	3.2%	4.5%
Partner + children (< 13 years old)	6.4%	8.0%	12.4%	6.7%	8.3%
Other relatives	9.2%	8.8%	10.7%	11.2%	10.0%
Friends	7.9%	8.0%	5.8%	6.9%	7.1%
Work colleagues	0.5%	0.7%	0.4%	0.9%	0.6%
Organized trip	0.4%	0.3%	0.2%	0.5%	0.4%
Other combinations (1)	11.7%	12.6%	15.5%	12.9%	13.1%
(1) Different situations have been isolated					
Tourists with children	15.7%	17.3%	26.1%	15.3%	18.4%
- Between 0 and 2 years old	1.3%	1.8%	1.2%	1.0%	1.3%
- Between 3 and 12 years old	13.6%	13.7%	23.2%	13.4%	15.8%
- Between 0 -2 and 3-12 years	0.8%	1.8%	1.7%	1.0%	1.3%
Tourists without children	84.3%	82.7%	73.9%	84.7%	81.6%
Group composition:				•••••	
- 1 person	10.8%	11.4%	8.8%	12.0%	10.8%
- 2 people	59.0%	57.0%	47.8%	56.0%	55.0%
- 3 people	11.1%	11.0%	15.6%	12.4%	12.5%
- 4 or 5 people	15.6%	17.4%	23.4%	15.8%	17.9%
- 6 or more people	3.5%	3.2%	4.4%	3.7%	3.7%
Average group size:	2.54	2.55	2.82	2.56	2.61

202201 202202 202203 202204

<sup>\*</sup>People who share the main expenses of the trip



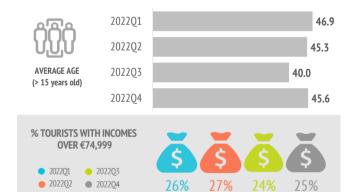
# 18.4% of tourists travel with children.







	2022Q1	2022Q2	2022Q3	2022Q4	2022
Gender					
Men	44.6%	43.3%	45.3%	45.6%	44.7%
Women	55.4%	56.7%	54.7%	54.4%	55.3%
Age					
Average age (tourist > 15 years old)	46.9	45.3	40.0	45.6	44.5
Standard deviation	15.8	15.9	14.4	16.0	15.8
Age range (> 15 years old)					
16 - 24 years old	7.4%	9.1%	17.0%	9.7%	10.7%
25 - 30 years old	11.2%	13.1%	15.6%	11.7%	12.9%
31 - 45 years old	31.3%	30.9%	33.1%	30.8%	31.5%
46 - 60 years old	25.6%	26.1%	24.4%	26.1%	25.6%
Over 60 years old	24.5%	20.7%	9.9%	21.6%	19.3%
Occupation					
Salaried worker	54.3%	58.4%	64.3%	55.6%	58.0%
Self-employed	12.2%	11.1%	9.7%	11.4%	11.1%
Unemployed	1.4%	1.0%	1.1%	1.0%	1.1%
Business owner	9.0%	6.9%	0.0%	9.1%	8.2%
Student	3.1%	3.8%	8.6%	3.8%	4.8%
Retired	18.3%	16.9%	6.9%	18.0%	15.2%
Unpaid domestic work	0.7%	0.6%	0.8%	0.7%	0.7%
Others	1.0%	1.2%	0.8%	0.5%	0.8%
Annual household income level					
Less than €25,000	13.7%	16.0%	16.1%	14.9%	15.2%
€25,000 - €49,999	34.3%	35.8%	35.3%	34.5%	35.0%
€50,000 - €74,999	26.4%	21.5%	24.6%	25.1%	24.4%
More than €74,999	25.6%	26.8%	24.0%	25.4%	25.5%
Education level					
No studies	2.9%	4.5%	4.3%	3.7%	3.9%
Primary education	1.2%	1.2%	1.3%	2.1%	1.5%
Secondary education	18.1%	19.7%	18.6%	21.1%	19.4%
Higher education	77.7%	74.6%	75.8%	73.0%	75.2%



#### % TOURIST TRAVEL ONLY WITH PARTNER

