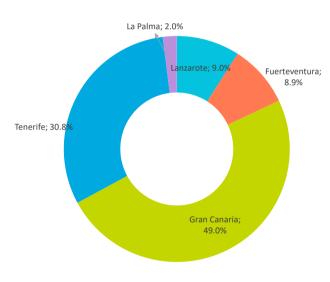
# **DENMARK**



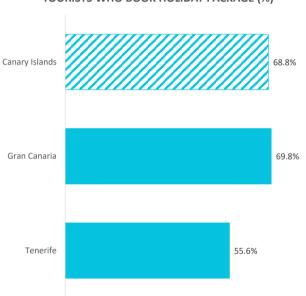
#### INBOUND TOURISM AND TOURIST EXPENDITURE

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Tourist arrivals ≥ 16 years old (EGT)	254,700	22,993	22,658	124,806	78,484	5,086
% Tourists	100%	9.0%	8.9%	49.0%	30.8%	2.0%
% tourists who book holiday package	68.8%			69.8%	55.6%	
Expenditure per tourist (€)	1,517	-		1,518	1,512	
- book holiday package	1,675			1,743	1,636	
- holiday package	1,307			1,327	1,267	
- others	367			416	368	
- do not book holiday package	1,170			998	1,356	
- flight	365			358	379	
- accommodation	394			307	480	
- others	410			333	497	
Average lenght of stay	9.53			9.39	10.58	
Average daily expenditure (€)	181.3			180.2	172.6	
Average daily expenditure without flight (€)	124.3			125.5	119.4	
Average cost of the flight (€)	459.5			442.4	440.9	
Total turnover (≥ 16 years old) (€m)	386			189	119	
% Turnover	100%			49.0%	30.7%	
Tourist arrivals (FRONTUR)	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.
Passenger arrivals on non-stop flights (AENA)	344,277	28,103	32,731	176,555	96,869	10,019
Children < 16 years old (FRONTUR - EGT)	n.d.	n.d.	n.d.	n.d.	n.d.	n.d.

#### % TOURISTS (≥ 16 years old)



#### **TOURISTS WHO BOOK HOLIDAY PACKAGE (%)**



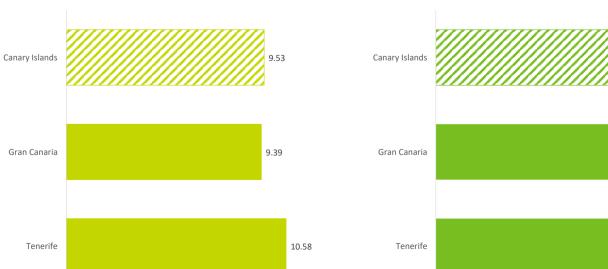
EXPENDITURE PER TOURIST WITHOUT FLIGHT (€)

124.3

125.5

119.4

#### **AVERAGE LENGHT OF STAY**





# % Tourists whose spending has been greater than €0 in each item

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Accommodation:						
- Accommodation	89.4%			88.1%	86.8%	
- Additional accommodation expenses	4.9%			4.0%	5.7%	
Transport:						
- National/International Transport	95.9%			95.8%	95.8%	
- Flights between islands	3.2%			2.5%	3.2%	
- Taxi	57.4%			64.9%	54.5%	
- Car rental	27.1%			23.2%	35.3%	
- Public transport	8.3%			11.0%	6.2%	
Food and drink:						
- Food purchases at supermarkets	56.1%			54.0%	53.8%	
- Restaurants	66.9%			65.9%	69.7%	
Leisure:						
- Organized excursions	18.5%			11.8%	30.4%	
- Sport activities	6.6%			3.8%	4.7%	
- Cultural activities	1.4%			0.8%	2.1%	
- Museums	2.3%			2.6%	1.1%	
- Theme Parks	4.1%			1.7%	10.0%	
- Discos and pubs	6.4%			7.0%	7.2%	
- Wellness	4.3%			2.7%	5.3%	
Purchases of goods:						
- Souvenirs	34.4%			35.1%	36.6%	
- Real estate	0.0%			0.0%	0.0%	
- Other purchases	0.6%			0.7%	0.0%	
Others:						
- Medical expenses	8.4%			10.3%	7.3%	
- Other expenses	8.0%			9.8%	5.2%	

# Average expenditure of tourists whose spending has been greater than €0 in each item

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Expenditure per tourist and trip (€)	·					
Accommodation:	908			1,078	803	
- Accommodation	688			698	687	
- Additional accommodation expenses	220			380	116	
Transport:	832			843	790	
- National/International Transport	479			462	460	
- Flights between islands	92			120	73	
- Taxi	113			115	110	
- Car rental	120			115	126	
- Public transport	27			31	21	
Food and drink:	381			401	406	
- Food purchases at supermarkets	114			110	130	
- Restaurants	267			292	276	
Leisure:	503			499	673	
- Organized excursions	108			118	109	
- Sport activities	80			100	45	
- Cultural activities	60			89	68	
- Museums	42			15	162	
- Theme Parks	61			51	65	
- Discos and pubs	100			66	172	
- Wellness	52			61	51	
Purchases of goods:	216			324	81	
- Souvenirs	99			127	81	
- Real estate	0			0	0	
- Other purchases	117			197	0	
Others:	166			144	119	
- Medical expenses	71			80	55	
- Other expenses	96			65	64	



#### **TOURIST PROFILE**

**DENMARK** 

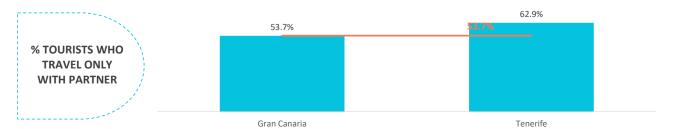
#### Who are they?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
<u>Gender</u>						
Percentage of men	49.3%			51.2%	47.9%	
Percentage of women	50.7%			48.8%	52.1%	
Age						
Average age (tourists above 16 years old)	51.47			51.43	52.71	
Standard deviation	17.4			17.7	17.2	
Age range						
16-24 years old	8.7%			9.7%	5.6%	
25-30 years old	8.2%			7.2%	9.0%	
31-45 years old	18.2%			19.9%	18.6%	
46-60 years old	28.1%			24.1%	27.2%	
Over 60 years old	36.8%			39.0%	39.5%	
Occupation						
Salaried worker	53.6%			50.5%	55.4%	
Self-employed	7.6%			8.1%	3.4%	
Unemployed	0.1%			0.2%	0.0%	
Business owner	7.3%			8.1%	5.6%	
Student	4.5%			5.8%	3.0%	
Retired	26.5%			27.0%	32.6%	
Unpaid domestic work	0.1%			0.0%	0.0%	
Others	0.3%			0.4%	0.0%	
Annual household income level						
Less than €25,000	6.0%			7.7%	5.6%	
€25,000 - €49,999	22.3%			23.2%	22.7%	
€50,000 - €74,999	28.9%			28.6%	30.7%	
More than €74,999	42.7%			40.5%	41.0%	
Education level						
No studies	2.4%			3.8%	0.6%	
Primary education	4.0%			4.3%	4.1%	
Secondary education	13.6%			13.3%	8.5%	
Higher education	80.0%			78.6%	86.8%	

# Who do they come with?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Unaccompanied	6.4%			8.6%	3.0%	
Only with partner	53.7%			53.7%	62.9%	
Only with children (< 13 years old)	3.5%			3.9%	3.4%	
Partner + children (< 13 years old)	6.0%			4.4%	7.5%	
Other relatives	9.6%			9.2%	6.2%	
Friends	4.8%			5.3%	4.6%	
Work colleagues	0.1%			0.0%	0.3%	
Organized trip	0.4%			0.9%	0.0%	
Other combinations (2)	15.4%			14.1%	12.1%	
<sup>(2)</sup> Different situations have been isolated						
Tourists with children	14.6%			13.0%	17.2%	
- Between 0 and 2 years old	1.0%			0.8%	1.5%	
- Between 3 and 12 years old	11.9%			10.6%	13.1%	
- Between 0 -2 and 3-12 years old	1.7%			1.5%	2.5%	
Tourists without children	85.4%			87.0%	82.8%	
Group composition:						
- 1 person	8.8%			10.8%	5.3%	
- 2 people	61.6%			61.9%	67.9%	
- 3 people	10.5%			10.4%	10.4%	
- 4 or 5 people	16.4%			15.3%	12.5%	
- 6 or more people	2.8%			1.6%	3.9%	
Average group size:	2.56			2.43	2.59	

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



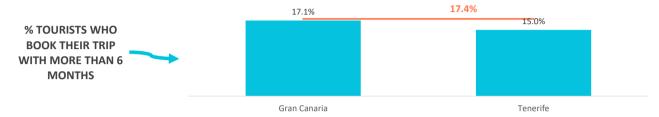
# **DENMARK**



#### **TRIP BOOKING**

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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
The same day	0.5%			1.0%	0.0%	
Between 1 and 30 days	23.0%			22.4%	24.7%	
Between 1 and 2 months	26.6%			27.4%	27.8%	
Between 3 and 6 months	32.4%			32.1%	32.6%	
More than 6 months	17.4%			17 1%	15.0%	

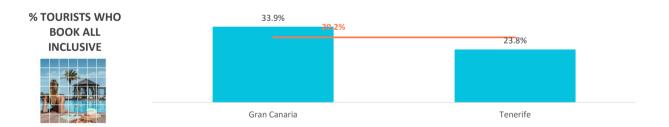


#### With whom did they book their flight and accommodation?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Flight						
- Directly with the airline	26.7%			24.5%	34.3%	
- Tour Operator or Travel Agency	73.3%			75.5%	65.7%	
<u>Accommodation</u>						
- Directly with the accommodation	23.5%			22.8%	27.3%	
- Tour Operator or Travel Agency	76.5%			77.2%	72.7%	

#### What do they book?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Room only	34.3%			36.5%	36.5%	
Bed and Breakfast	17.2%			16.2%	19.3%	
Half board	15.5%			11.2%	17.8%	
Full board	3.9%			2.1%	2.6%	
All inclusive	29.2%			33.9%	23.8%	



#### **ACCOMMODATION**

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
1-2-3* Hotel	22.6%			22.6%	15.9%	
4* Hotel	36.3%			33.8%	34.1%	
5* Hotel / 5* Luxury Hotel	5.8%			5.8%	7.4%	
Aparthotel / Tourist Villa	21.6%			25.4%	24.5%	
House/room rented in a private dwelling	4.2%			4.9%	5.5%	
Private accommodation (1)	4.5%			4.4%	7.5%	
Others (Cottage, cruise, camping,)	5.0%			3.1%	5.0%	

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

# TYPE OF ACCOMMODATION



# DENMARK



#### TRIP MOTIVATION AND DESTINATION CHOICE

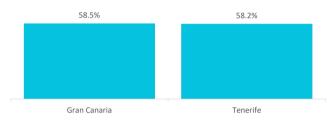
#### What is the main reason for visiting the Canary Islands?

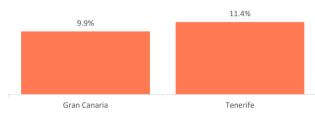
	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Holidays	92.8%			92.2%	92.5%	
Family reasons	4.3%			5.2%	5.5%	
Business	0.7%			0.7%	1.0%	
Education and training	0.1%			0.2%	0.0%	
Sports training	1.4%			0.6%	0.7%	
Health	0.0%			0.0%	0.0%	
Conventions and Exhibitions	0.0%			0.0%	0.0%	
Others	0.7%			1.1%	0.5%	

# What is the main motivation for their holidays?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Rest	54.3%			58.5%	58.2%	
Enjoy family time	24.6%			23.1%	24.4%	
Have fun	6.2%			5.6%	5.3%	
Explore the destination	9.7%			9.9%	11.4%	
Practice their hobbies	4.1%			1.3%	0.4%	
Other reasons	1.1%			1.5%	0.3%	







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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Climate	74.5%			74.6%	77.6%	
Safety	35.2%			35.0%	41.2%	
Tranquility	34.4%			37.9%	31.5%	
Sea	34.3%			36.3%	34.3%	
Accommodation supply	34.0%			36.1%	31.6%	
Beaches	31.3%			30.1%	31.7%	
Effortless trip	28.3%			29.0%	30.0%	
Price	25.4%			25.3%	27.2%	
European belonging	25.3%			30.0%	21.6%	
Landscapes	21.7%			19.0%	30.2%	
Environment	21.5%			23.5%	14.3%	
Gastronomy	14.9%			18.6%	10.3%	
Fun possibilities	14.7%			15.4%	15.6%	
Authenticity	14.7%			14.3%	13.4%	
Exoticism	12.6%			12.3%	15.7%	
Hiking trail network	7.8%			9.8%	6.9%	
Shopping	6.6%			7.0%	6.2%	
Culture	4.8%			5.5%	5.7%	
Historical heritage	3.3%			4.7%	1.8%	
Nightlife	2.9%			4.4%	1.5%	

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.

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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Previous visits to the Canary Islands	55.2%			55.6%	60.7%	
Friends or relatives	20.7%			22.2%	18.8%	
Internet or social media	47.6%			43.1%	50.8%	
Mass Media	1.0%			1.5%	0.3%	
Travel guides and magazines	4.0%			2.3%	7.0%	
Travel Blogs or Forums	4.3%			4.3%	5.2%	
Travel TV Channels	0.0%			0.0%	0.0%	
Tour Operator or Travel Agency	25.7%			26.4%	21.7%	
Public administrations or similar	0.2%			0.5%	0.0%	
Others	1.7%			1.9%	1.8%	

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

# **DENMARK**



#### SATISFACTION AND LOYALTY INDICATORS

#### Satisfaction

Satisfaction (scale 0-10)	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Average rating	8.71			8.74	8.68	
Experience in the Canary Islands	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Worse or much worse than expected	1.8%			1.2%	3.8%	
Lived up to expectations	63.8%			70.1%	58.3%	
Better or much better than expected	34.5%			28.7%	37.9%	
Future intentions (scale 1-10)	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Return to the Canary Islands	8.76			8.62	8.90	
Recommend visiting the Canary Islands	8.82			8.72	8.87	
RETURN TO THE CANARY ISLANDS	8.62	8.72	8.90	8.87	RECOMMEND VISITING THE CANARY ISLAND	S
0 10					0 10	
Canary Islands = 8.76					Canary Islands =	8.82
	Gran Canaria		Tene	erife		

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

#### REPEAT TOURISTS WHO VISIT CANAY ISLANDS BY ISLAND OF STAY IN THIS TRIP

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
First visit	22.3%			22.4%	21.0%	
Repeat tourists	77.7%			77.6%	79.0%	
At least 10 previous visits	24.4%			24.9%	23.2%	
Repeat tourists (last 5 years)	68.6%			69.1%	69.8%	
Repeat tourists (last 5 years) (5 or more visits)	18.7%			16.2%	21.9%	

#### REPEAT TOURIST OF EACH ISLAND BY ISLAND OF STAY IN THIS TRIP

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Lanzarote	22.9%	=		12.7%	14.7%	
Fuerteventura	28.4%		=	31.7%	19.9%	
Gran Canaria	63.0%			<u>74.3%</u>	26.5%	
Tenerife	51.6%			34.9%	70.3%	
La Palma	6.8%			24.5%	22.4%	<u>=</u>
CANARY ISLANDS	<u>77.7%</u>			77.6%	79.0%	

#### How to interpret the table

- 1. Column <u>Canary Islands</u> = refers to the % of **repeat danish tourists** on each island regardless of island of stay in this trip (2023).
- 2. Column <u>each</u> island = refers to the % of **repeat danish tourist** on each island by island of stay in 2023. For example: 74.3% refers to % **repeat danish tourist** who repeat Gran Canaria in 2023 and stay in Gran Canaria in this trip. 34.9% **danish tourist who stay in Gran Canaria in 2023** and has previously been to Tenerife.
- 3. Row CANARY ISLANDS = refers to the % repeat danish tourists by island of stay. For exdample: 79% refers to % danish tourist who visit Tenerife in 2023 and has previously been to Canary Islands.

#### **ISLANDS**

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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
One island	95.4%			96.1%	94.7%	
Two islands	4.4%			3.9%	5.3%	
Three or more islands	0.2%			0.0%	0.0%	

# Visited islands during their trip (with overnight staying)

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Lanzarote	9.2%			0.0%	0.0%	
Fuerteventura	9.3%			0.5%	0.0%	
Gran Canaria	49.4%			100%	0.8%	
Tenerife	31.1%			0.0%	100%	
La Gomera	0.6%			0.0%	0.6%	
La Palma	2.1%			0.2%	0.0%	
El Hierro	0.0%			0.0%	0.0%	
Cruise	0.0%			0.0%	0.0%	

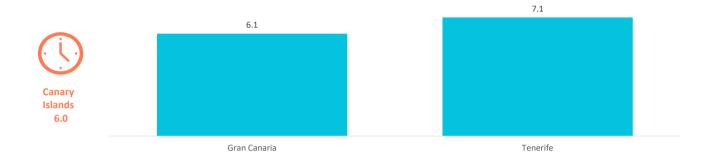
# **DENMARK**



#### **ACTIVITIES IN THE CANARY ISLANDS**

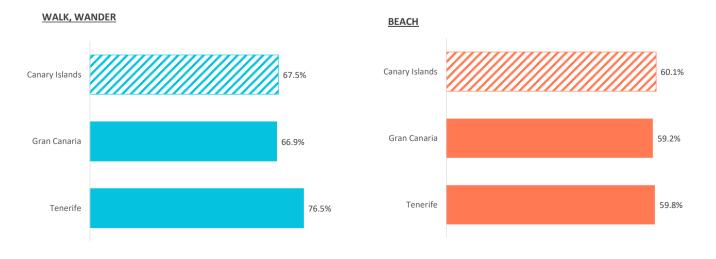
#### Outdoor time per day

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
0 hours	7.9%			8.2%	3.9%	
1 - 2 hours	16.1%			12.5%	14.5%	
3 - 6 hours	36.2%			38.6%	32.1%	
7 - 12 hours	32.8%			35.0%	38.0%	
More than 12 hours	7.1%			5.7%	11.5%	
Outdoor time per day	6.0			6.1	7.1	



#### Activities in the Canary Islands

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Walk, wander	67.5%			66.9%	76.5%	
Beach	60.1%			59.2%	59.8%	
Swimming pool, hotel facilities	54.5%			52.2%	63.0%	
Explore the island on their own	53.9%			54.0%	57.9%	
Taste Canarian gastronomy	22.3%			19.6%	24.6%	
Hiking	18.5%			17.0%	21.4%	
Organized excursions	14.0%			9.5%	20.9%	
Nightlife / concerts / shows	8.2%			4.8%	5.5%	
Theme parks	8.1%			6.8%	13.4%	
Sea excursions / whale watching	8.0%			9.0%	7.7%	
Wineries / markets / popular festivals	7.7%			7.7%	7.6%	
Museums / exhibitions	7.5%			6.5%	9.8%	
Other Nature Activities	7.3%			9.6%	6.7%	
Swim	6.9%			3.1%	2.3%	
Beauty and health treatments	6.3%			5.4%	7.8%	
Running	5.9%			7.5%	4.2%	
Practice other sports	5.4%			1.9%	3.8%	
Astronomical observation	3.6%			2.8%	4.4%	
Cycling / Mountain bike	3.2%			2.6%	2.4%	
Surf	3.1%			2.8%	1.4%	
Scuba Diving	1.7%			1.1%	1.8%	
Golf	1.7%			0.6%	1.3%	
Windsurf / Kitesurf	0.4%			0.0%	0.0%	



# **DENMARK**

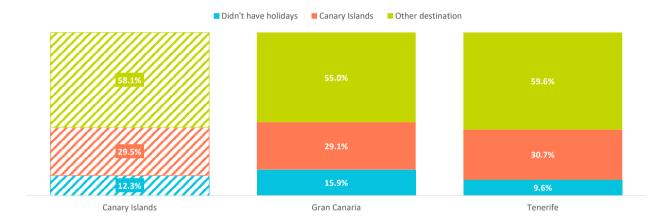


#### **COMPETITORS**

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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Didn't have holidays	12.3%			15.9%	9.6%	
Canary Islands	29.5%			29.1%	30.7%	
Other destination	58.1%			55.0%	59.6%	
Balearic Islands	2.2%			2.5%	2.5%	
Rest of Spain	7.9%			6.8%	9.8%	
Italy	7.5%			5.0%	10.5%	
France	4.0%			3.2%	3.7%	
Turkey	3.6%			5.0%	2.6%	
Greece	11.5%			13.0%	7.9%	
Portugal	2.6%			2.0%	1.6%	
Croatia	1.4%			1.1%	2.3%	
Egypt	0.5%			0.3%	0.5%	
Tunisia	0.1%			0.2%	0.0%	
Morocco	0.4%			0.0%	0.9%	
Others	16.4%			15.9%	17.4%	

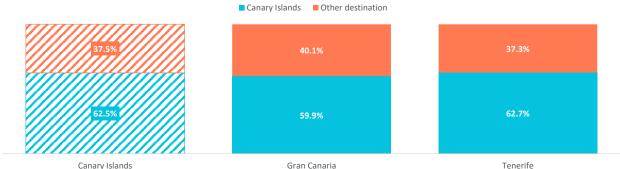
<sup>\*</sup> Percentage of valid answers



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

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
None (I was clear about "this Canary Island")	34.6%			31.7%	37.1%	
Canary Islands (other island)	27.9%			28.3%	25.6%	
Other destination	37.5%			40.1%	37.3%	
Balearic Islands	2.0%			1.3%	2.6%	
Rest of Spain	6.2%			6.1%	6.8%	
Italy	4.2%			5.1%	3.2%	
France	1.2%			1.0%	1.5%	
Turkey	3.0%			3.5%	3.6%	
Greece	8.0%			8.0%	9.3%	
Portugal	4.2%			4.8%	3.5%	
Croatia	1.7%			2.4%	1.4%	
Egypt	4.2%			5.5%	2.9%	
Others	2.7%			2.4%	2.5%	

<sup>\*</sup> Percentage of valid answers



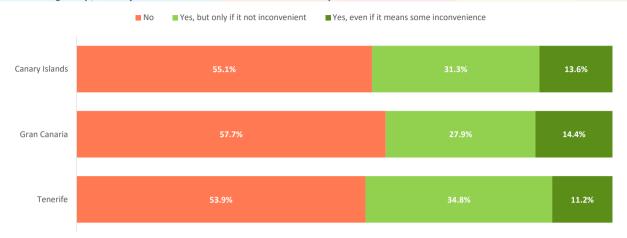
Canary Islands

# **DENMARK**

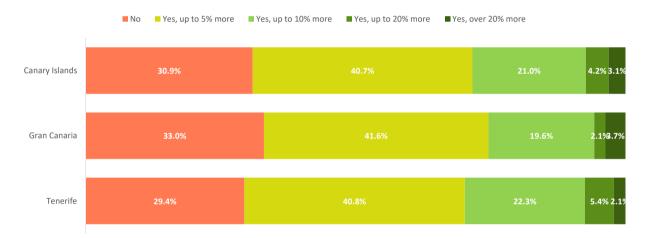


#### **SUSTAINABLE DESTINATION**

#### 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?



#### Percepcion of the following sustainability measures during their stay \*

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Quality of life on the island	7.7			7.8	7.7	
Tolerance towards tourism	8.4			8.5	8.6	
Cleanliness of the island	8.1			8.1	8.2	
Air quality	8.3			8.4	8.2	
Rational water consumption	7.5			7.6	7.4	
Energy saving	6.8			6.9	6.7	
Use of renewable energy	7.0			7.1	6.8	
Recycling	6.5			6.5	6.5	
Easy to get around by public transport	7.0			7.5	6.9	
Overcrowding in tourist areas	6.5			6.4	6.8	
Supply of local products	6.8			6.8	7.0	

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

#### **FLIGHT ORIGIN**

# Where does the flight come from?

	Canary Islands	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Denmark	93.4%			94.1%	92.7%	
Germany	2.4%			3.1%	0.3%	
Spanish Mainland	1.6%			1.3%	2.4%	
Sweden	1.2%			0.3%	3.5%	
Switzerland	0.5%			0.5%	0.0%	
Others	0.9%			0.7%	1.1%	