

PROFILE OF TOURIST BY ACTIVITIES CARRIED OUT ON THE CANARY ISLANDS (2019)

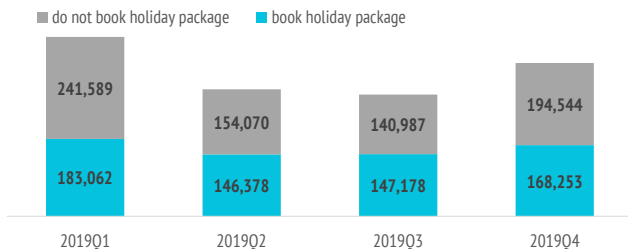
NATURE ACTIVITIES

How many are they and how much do they spend?



| | Nature activities | Total |
|---|-------------------|-------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | n.d. | 15,110,866 |
| Tourist arrivals > 15 years old (EGT) | 1,376,060 | 13,271,035 |
| - book holiday package | 644,871 | 7,426,022 |
| - do not book holiday package | 731,190 | 5,845,014 |
| - % tourists who book holiday package | 46.9% | 56.0% |
| Share of total tourist | 10.4% | 100% |

TOURISTS BY QUARTER: NATURE ACTIVITIES



| | Nature activities | Total |
|--|-------------------|---------------|
| Expenditure per tourist (€) | 1,139 | 1,136 |
| - book holiday package | 1,319 | 1,268 |
| - holiday package | 1,053 | 1,031 |
| - others | 266 | 237 |
| - do not book holiday package | 979 | 967 |
| - flight | 266 | 263 |
| - accommodation | 312 | 321 |
| - others | 402 | 383 |
| Average length of stay | 10.01 | 9.09 |
| - book holiday package | 9.08 | 8.64 |
| - do not book holiday package | 10.84 | 9.68 |
| Average daily expenditure (€) | 130.8 | 138.9 |
| - book holiday package | 154.9 | 155.4 |
| - do not book holiday package | 109.5 | 117.9 |
| Total turnover (> 15 years old) (€m) | 1,567 | 15,070 |
| - book holiday package | 851 | 9,416 |
| - do not book holiday package | 716 | 5,655 |

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



| | Nature activities | Total |
|----------------------|-------------------|-------|
| Climate | 73.9% | 78.4% |
| Landscapes | 52.9% | 33.1% |
| Sea | 47.6% | 44.4% |
| Tranquility | 47.1% | 47.6% |
| Safety | 46.5% | 51.9% |
| Environment | 42.2% | 33.2% |
| European belonging | 35.0% | 36.1% |
| Beaches | 34.6% | 37.7% |
| Accommodation supply | 32.5% | 42.9% |
| Price | 30.7% | 37.4% |
| Effortless trip | 30.7% | 35.2% |
| Authenticity | 26.6% | 20.3% |
| Hiking trail network | 24.5% | 9.6% |
| Gastronomy | 22.6% | 23.2% |
| Fun possibilities | 20.2% | 21.1% |
| Exoticism | 15.6% | 11.4% |
| Historical heritage | 11.4% | 8.2% |
| Culture | 10.6% | 8.0% |
| Shopping | 6.9% | 9.4% |
| Nightlife | 5.9% | 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.

What is the main motivation for their holidays?



| | Nature activities | Total |
|-------------------------|-------------------|-------|
| Rest | 36.1% | 55.5% |
| Enjoy family time | 12.8% | 14.4% |
| Have fun | 7.6% | 8.6% |
| Explore the destination | 37.0% | 17.8% |
| Practice their hobbies | 3.7% | 1.9% |
| Other reasons | 2.7% | 1.8% |

EXPLORE THE DESTINATION



How far in advance do they book their trip?



| | Nature activities | Total |
|------------------------|-------------------|-------|
| The same day | 0.9% | 0.7% |
| Between 1 and 30 days | 25.6% | 23.8% |
| Between 1 and 2 months | 24.9% | 22.8% |
| Between 3 and 6 months | 32.4% | 32.7% |
| More than 6 months | 16.2% | 20.0% |

% TOURISTS BOOKING BETWEEN 1 AND 30 DAYS IN ADVANCE

NATURE ACTIVITIES
25.6%



TOTAL
23.8%

Picture: Freepik.com

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NATURE ACTIVITIES

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

| | Nature activities | Total |
|---------------------------------------|-------------------|-------|
| Previous visits to the Canary Islands | 44.8% | 51.9% |
| Friends or relatives | 30.7% | 27.1% |
| Internet or social media | 61.9% | 54.7% |
| Mass Media | 2.6% | 1.6% |
| Travel guides and magazines | 15.4% | 8.4% |
| Travel Blogs or Forums | 11.1% | 5.7% |
| Travel TV Channels | 1.7% | 0.8% |
| Tour Operator or Travel Agency | 19.8% | 22.6% |
| Public administrations or similar | 0.8% | 0.4% |
| Others | 3.0% | 2.4% |

* Multi-choice question

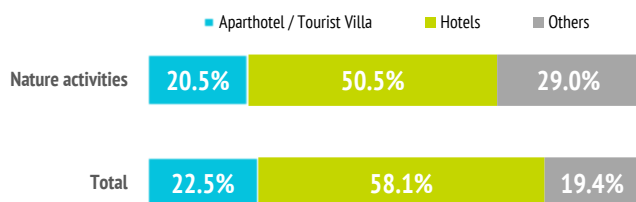
With whom did they book their flight and accommodation?

| | Nature activities | Total |
|-----------------------------------|-------------------|-------|
| Flight | | |
| - Directly with the airline | 49.7% | 42.9% |
| - Tour Operator or Travel Agency | 50.3% | 57.1% |
| Accommodation | | |
| - Directly with the accommodation | 37.4% | 31.5% |
| - Tour Operator or Travel Agency | 62.6% | 68.5% |

Where do they stay?

| | Nature activities | Total |
|---|-------------------|-------|
| 1-2-3* Hotel | 10.6% | 11.5% |
| 4* Hotel | 33.1% | 37.6% |
| 5* Hotel / 5* Luxury Hotel | 6.8% | 9.0% |
| Aparthotel / Tourist Villa | 20.5% | 22.5% |
| House/room rented in a private dwelling | 11.5% | 5.9% |
| Private accommodation (1) | 9.0% | 7.2% |
| Others (Cottage, cruise, camping,...) | 8.5% | 6.3% |

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



What do they book?

| | Nature activities | Total |
|-------------------|-------------------|-------|
| Room only | 34.7% | 27.9% |
| Bed and Breakfast | 12.8% | 12.4% |
| Half board | 24.7% | 21.2% |
| Full board | 3.4% | 3.6% |
| All inclusive | 24.4% | 34.9% |

”
34.7% of tourists book room only.
(Canary Islands: 27.9%)

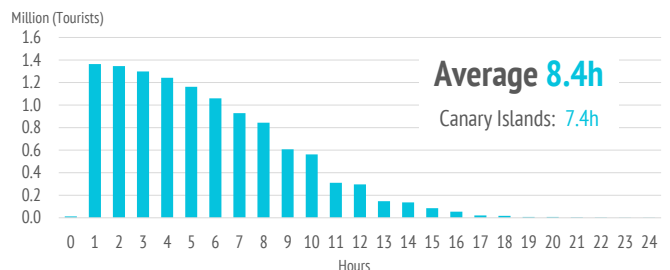
Other expenses

| | Nature activities | Total |
|-----------------------------------|-------------------|-------|
| Restaurants or cafes | 65.5% | 59.1% |
| Supermarkets | 61.9% | 52.1% |
| Car rental | 47.0% | 26.3% |
| Organized excursions | 30.2% | 20.6% |
| Taxi, transfer, chauffeur service | 38.2% | 50.0% |
| Theme Parks | 10.1% | 7.5% |
| Sport activities | 9.7% | 5.7% |
| Museums | 9.8% | 4.6% |
| Flights between islands | 7.4% | 4.4% |

Activities in the Canary Islands

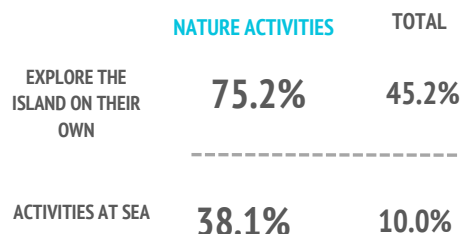
| Outdoor time per day | Nature activities | Total |
|----------------------|-------------------|-------|
| 0 hours | 0.9% | 2.1% |
| 1 - 2 hours | 4.8% | 9.8% |
| 3 - 6 hours | 26.9% | 32.6% |
| 7 - 12 hours | 56.8% | 47.1% |
| More than 12 hours | 10.7% | 8.4% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | Nature activities | Total |
|--|-------------------|-------|
| Nature activities | 100% | 10.4% |
| Walk, wander | 82.4% | 69.8% |
| Beach | 77.4% | 66.3% |
| Explore the island on their own | 75.2% | 45.2% |
| Swimming pool, hotel facilities | 50.6% | 58.2% |
| Taste Canarian gastronomy | 39.8% | 24.2% |
| Activities at sea | 38.1% | 10.0% |
| Sport activities | 26.6% | 13.4% |
| Organized excursions | 22.7% | 16.9% |
| Museums / exhibitions | 21.4% | 10.1% |
| Wineries / markets / popular festivals | 19.7% | 11.6% |
| Theme parks | 18.4% | 14.1% |
| Sea excursions / whale watching | 17.1% | 11.1% |
| Nightlife / concerts / shows | 13.9% | 15.5% |
| Astronomical observation | 8.4% | 3.5% |
| Beauty and health treatments | 6.9% | 5.4% |

* Multi-choice question



PROFILE OF TOURIST BY ACTIVITIES CARRIED OUT ON THE CANARY ISLANDS (2019)

NATURE ACTIVITIES

Which island do they choose?

| Tourist > 15 years old | Canarias | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|-------------------------------|------------|-----------|---------------|--------------|-----------|----------|
| Tourists: nature activities | 1,376,060 | 216,977 | 149,233 | 319,870 | 583,218 | 82,690 |
| - Share by islands | 100% | 15.8% | 10.8% | 23.2% | 42.4% | 0.8% |
| Total tourists | 13,271,035 | 2,521,668 | 1,659,115 | 3,698,127 | 5,040,382 | 235,409 |
| - Share by islands | 100% | 19.0% | 12.5% | 27.9% | 38.0% | 1.8% |
| % Tourists: nature activities | 10.4% | 8.6% | 9.0% | 8.6% | 11.6% | 35.1% |

How many islands do they visit during their trip?

| | Nature activities | Total |
|-----------------------|-------------------|-------|
| One island | 87.5% | 91.4% |
| Two islands | 10.4% | 7.2% |
| Three or more islands | 2.1% | 1.4% |

Internet usage during their trip

| | Nature activities | Total |
|-------------------------|-------------------|-------|
| Research | | |
| - Tourist package | 13.6% | 14.8% |
| - Flights | 10.7% | 13.0% |
| - Accommodation | 14.2% | 16.9% |
| - Transport | 14.8% | 15.7% |
| - Restaurants | 31.8% | 28.4% |
| - Excursions | 32.0% | 26.2% |
| - Activities | 37.2% | 30.1% |
| Book or purchase | | |
| - Tourist package | 36.5% | 39.4% |
| - Flights | 72.8% | 66.7% |
| - Accommodation | 62.5% | 57.3% |
| - Transport | 57.0% | 47.6% |
| - Restaurants | 14.5% | 12.1% |
| - Excursions | 21.1% | 13.0% |
| - Activities | 23.1% | 14.7% |

* Multi-choice question

| Internet usage in the Canary Islands | Nature activities | Total |
|--------------------------------------|-------------------|--------------|
| Did not use the Internet | 5.8% | 8.3% |
| Used the Internet | 94.2% | 91.7% |
| - Own Internet connection | 43.2% | 37.4% |
| - Free Wifi connection | 34.8% | 39.5% |
| Applications* | | |
| - Search for locations or maps | 77.0% | 61.7% |
| - Search for destination info | 56.2% | 44.8% |
| - Share pictures or trip videos | 59.4% | 56.0% |
| - Download tourist apps | 10.4% | 7.0% |
| - Others | 17.8% | 22.6% |

* Multi-choice question

77% of tourists search for locations or maps during their stay on the Canary Islands

(Canary Islands: 61.7%)



Picture: Freepik.com

BREAKDOWN OF NATURE ACTIVITIES



HIKING
27.9%



CYCLING /
MOUNTAIN BIKE
1.8%



TEIDE
9.3%



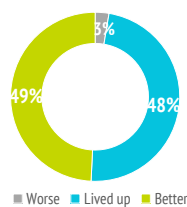
EXCURSIONS
2.5%

How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Nature activities | Total |
|---------------------------|-------------------|-------|
| Average rating | 8.75 | 8.70 |

| Experience in the Canary Islands | Nature activities | Total |
|-------------------------------------|-------------------|-------|
| Worse or much worse than expected | 2.6% | 2.3% |
| Lived up to expectations | 48.1% | 55.6% |
| Better or much better than expected | 49.2% | 42.1% |

| Future intentions (scale 1-10) | Nature activities | Total |
|---------------------------------------|-------------------|-------|
| Return to the Canary Islands | 8.66 | 8.73 |
| Recommend visiting the Canary Islands | 9.02 | 8.95 |



Experience in the
Canary Islands

8.66/10

Return to the
Canary Islands



9.02/10

Recommend visiting
the Canary Islands

How many are loyal to the Canary Islands?

| | Nature activities | Total |
|---|-------------------|--------------|
| Repeat tourists | 66.8% | 72.2% |
| Repeat tourists (last 5 years) | 61.7% | 66.7% |
| Repeat tourists (last 5 years) (5 or more visits) | 15.8% | 19.5% |
| At least 10 previous visits | 15.5% | 18.6% |

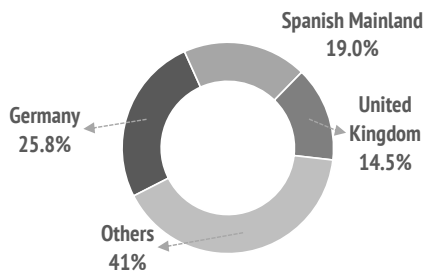
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NATURE ACTIVITIES

Where are they from?



| | % | Absolute |
|------------------|-------|----------|
| Germany | 25.8% | 354,710 |
| Spanish Mainland | 19.0% | 261,753 |
| United Kingdom | 14.5% | 199,890 |
| France | 5.8% | 80,163 |
| Netherlands | 4.8% | 66,550 |
| Belgium | 3.5% | 48,234 |
| Sweden | 3.4% | 46,515 |
| Poland | 2.5% | 34,849 |
| Switzerland | 2.5% | 34,416 |
| Denmark | 2.4% | 32,608 |
| Norway | 2.3% | 32,288 |
| Italy | 2.2% | 29,775 |
| Ireland | 2.0% | 27,256 |
| Austria | 1.2% | 16,476 |
| Finland | 1.0% | 14,420 |
| Russia | 1.0% | 13,855 |
| Czech Republic | 0.7% | 9,965 |
| Others | 5.3% | 71,550 |



Who do they come with?



| | Nature activities | Total |
|-------------------------------------|-------------------|-------|
| Unaccompanied | 9.5% | 9.6% |
| Only with partner | 50.5% | 48.1% |
| Only with children (< 13 years old) | 5.2% | 5.6% |
| Partner + children (< 13 years old) | 5.9% | 6.5% |
| Other relatives | 8.3% | 9.3% |
| Friends | 6.6% | 6.4% |
| Work colleagues | 0.3% | 0.5% |
| Organized trip | 0.3% | 0.3% |
| Other combinations ⁽¹⁾ | 13.5% | 13.7% |

(1) Different situations have been isolated

| | | |
|----------------------------------|--------------|--------------|
| Tourists with children | 16.0% | 17.7% |
| - Between 0 and 2 years old | 1.2% | 1.6% |
| - Between 3 and 12 years old | 13.6% | 14.8% |
| - Between 0 - 2 and 3-12 years | 1.1% | 1.4% |
| Tourists without children | 84.0% | 82.3% |
| Group composition: | | |
| - 1 person | 13.1% | 13.2% |
| - 2 people | 56.4% | 55.1% |
| - 3 people | 11.9% | 12.0% |
| - 4 or 5 people | 15.5% | 16.3% |
| - 6 or more people | 3.1% | 3.5% |
| Average group size: | 2.49 | 2.54 |

Who are they?



| | Nature activities | Total |
|--------------------------------------|-------------------|-------|
| Gender | | |
| Men | 51.4% | 48.6% |
| Women | 48.6% | 51.4% |
| Age | | |
| Average age (tourist > 15 years old) | 45.8 | 47.1 |
| Standard deviation | 15.5 | 15.4 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 8.0% | 7.3% |
| 25 - 30 years old | 13.0% | 10.9% |
| 31 - 45 years old | 28.6% | 28.0% |
| 46 - 60 years old | 30.2% | 31.8% |
| Over 60 years old | 20.2% | 22.1% |
| Occupation | | |
| Salaried worker | 54.6% | 55.0% |
| Self-employed | 11.3% | 11.5% |
| Unemployed | 1.2% | 1.1% |
| Business owner | 11.1% | 9.4% |
| Student | 4.6% | 3.5% |
| Retired | 15.3% | 17.9% |
| Unpaid domestic work | 0.8% | 0.8% |
| Others | 1.1% | 0.8% |
| Annual household income level | | |
| Less than €25,000 | 19.3% | 17.5% |
| €25,000 - €49,999 | 38% | 37.5% |
| €50,000 - €74,999 | 21.6% | 22.8% |
| More than €74,999 | 21.4% | 22.2% |
| Education level | | |
| No studies | 1.9% | 5.0% |
| Primary education | 3.2% | 2.6% |
| Secondary education | 21.3% | 23.6% |
| Higher education | 73.7% | 68.9% |



Pictures: Freepik.com