

TOURIST PROFILE BY ISLAND OF STAY (2018)

GERMANY

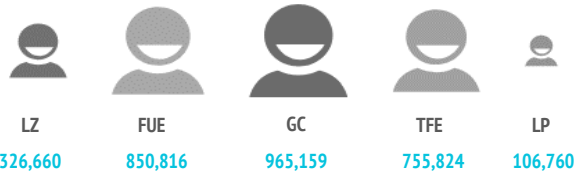
How many are they and how much do they spend?



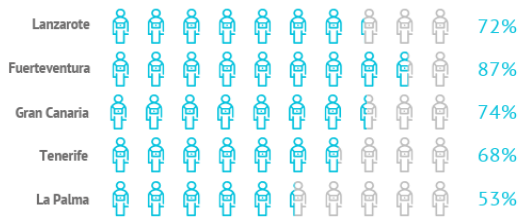
	LZ	FUE	GC	TFE	LP
TOURISTS					
Tourist arrivals (FRONTUR) (*)	326.66	850.82	965.16	755.82	106.76
Tourist arrivals > 15 years old (EGT) (*)	292.17	755.34	862.11	681.18	99.95
- book holiday package (*)	210.79	653.47	639.76	463.12	52.81
- do not book holiday package (*)	81.39	101.86	222.34	218.06	47.14
- % tourists who book holiday package	72.1%	86.5%	74.2%	68.0%	52.8%

(*) Thousands of tourists

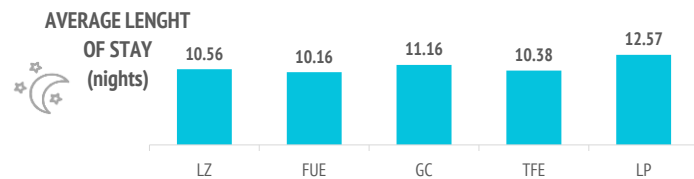
TOURISTS



% TOURISTS WHO BOOK HOLIDAY PACKAGE



	LZ	FUE	GC	TFE	LP
Expenditure per tourist (€)	1,405	1,264	1,359	1,204	1,246
- book holiday package	1,483	1,293	1,405	1,312	1,250
- holiday package	1,273	1,122	1,171	1,075	968
- others	210	171	234	237	282
- do not book holiday package	1,204	1,081	1,224	975	1,242
- flight	292	273	326	275	380
- accommodation	459	468	446	295	379
- others	452	340	452	404	483
Average length of stay	10.56	10.16	11.16	10.38	12.57
- book holiday package	9.79	9.95	9.84	9.35	10.15
- do not book holiday package	12.56	11.48	14.98	12.56	15.29
Average daily expenditure (€)	148.5	132.6	140.8	130.9	112.5
- book holiday package	161.0	136.3	151.9	148.1	131.4
- do not book holiday package	116.0	109.0	108.9	94.3	91.3
Total turnover (> 15 years old) (€m)	411	955	1,171	820	125
- book holiday package	313	845	899	608	66
- do not book holiday package	98	110	272	213	59



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

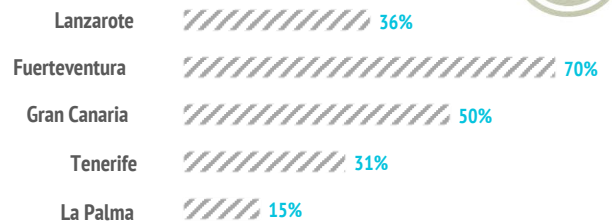


	LZ	FUE	GC	TFE	LP
Climate	79.1%	79.9%	80.1%	74.3%	77.0%
Sea	56.1%	73.1%	59.7%	51.2%	45.8%
Safety	57.3%	60.3%	58.1%	50.0%	44.8%
Tranquility	46.7%	60.2%	49.3%	43.3%	55.8%
Beaches	35.5%	70.1%	50.4%	30.9%	14.8%
Effortless trip	38.3%	46.8%	46.9%	39.2%	34.0%
European belonging	39.0%	42.3%	43.9%	36.8%	33.5%
Accommodation supply	40.3%	46.2%	41.9%	33.4%	26.8%
Landscapes	40.3%	22.0%	31.2%	46.6%	79.4%
Price	23.4%	32.1%	27.6%	27.8%	15.5%
Environment	28.0%	19.4%	20.3%	26.8%	46.1%
Gastronomy	18.5%	22.6%	23.2%	21.9%	15.4%
Authenticity	20.3%	18.4%	15.3%	17.7%	29.6%
Fun possibilities	10.3%	16.8%	15.5%	16.7%	7.3%
Hiking trail network	7.4%	4.6%	8.2%	15.2%	50.3%
Shopping	5.2%	7.8%	10.8%	9.3%	2.9%
Exoticism	5.8%	7.5%	6.6%	8.1%	4.8%
Culture	8.8%	5.0%	6.7%	8.1%	2.6%
Historical heritage	9.7%	4.9%	5.9%	7.3%	5.8%
Nightlife	0.9%	3.1%	7.1%	3.6%	0.0%

Each aspect is rated individually ("Not important", "Somewhat", "Quite", "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	43.7%	60.7%	54.1%	37.5%	24.0%
Enjoy family time	9.0%	8.1%	8.3%	8.8%	3.7%
Have fun	3.7%	4.9%	8.2%	9.0%	1.2%
Explore the destination	38.1%	20.3%	24.7%	39.0%	57.4%
Practice their hobbies	3.8%	4.1%	2.1%	2.3%	5.6%
Other reasons	1.6%	1.9%	2.7%	3.4%	8.1%

How far in advance do they book their trip?



	LZ	FUE	GC	TFE	LP
The same day	0.6%	0.4%	0.9%	0.6%	0.1%
Between 1 and 30 days	17.1%	22.2%	26.3%	23.2%	15.3%
Between 1 and 2 months	19.3%	22.9%	22.7%	21.0%	17.7%
Between 3 and 6 months	39.4%	34.9%	31.8%	34.5%	39.0%
More than 6 months	23.6%	19.7%	18.3%	20.7%	27.9%

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

TOURIST PROFILE BY ISLAND OF STAY (2018)

GERMANY



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

	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	55.2%	52.2%	50.9%	43.6%	59.1%
Friends or relatives	21.2%	21.1%	23.9%	27.5%	29.0%
Internet or social media	55.7%	52.9%	52.0%	55.1%	61.6%
Mass Media	1.9%	2.3%	2.0%	3.1%	5.9%
Travel guides and magazines	20.2%	11.8%	12.4%	17.5%	38.1%
Travel Blogs or Forums	5.0%	4.2%	4.3%	5.8%	5.1%
Travel TV Channels	1.0%	1.9%	1.3%	1.2%	3.8%
Tour Operator or Travel Agency	34.4%	36.6%	35.6%	31.0%	24.6%
Public administrations or similar	0.2%	0.1%	0.1%	0.4%	0.3%
Others	0.8%	1.1%	1.7%	2.1%	2.6%

* Multi-choice question

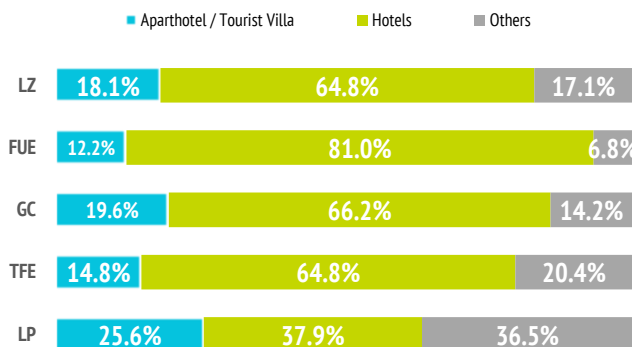
With whom did they book their flight and accommodation?

	LZ	FUE	GC	TFE	LP
Flight					
- Directly with the airline	22.9%	14.7%	23.3%	29.0%	38.5%
- Tour Operator or Travel Agency	77.1%	85.3%	76.7%	71.0%	61.5%
Accommodation					
- Directly with the accommodation	15.0%	10.8%	14.9%	19.7%	30.5%
- Tour Operator or Travel Agency	85.0%	89.2%	85.1%	80.3%	69.5%

Where do they stay?

	LZ	FUE	GC	TFE	LP
1-2-3* Hotel	6.7%	16.5%	18.5%	12.6%	9.7%
4* Hotel	51.2%	63.0%	40.9%	45.1%	28.1%
5* Hotel / 5* Luxury Hotel	6.9%	1.5%	6.8%	7.1%	0.0%
Aparthotel / Tourist Villa	18.1%	12.2%	19.6%	14.8%	25.6%
House/room rented in a private dwelling	7.1%	2.6%	4.5%	6.3%	13.4%
Private accommodation (1)	3.1%	1.8%	4.7%	8.5%	7.2%
Others (Cottage, cruise, camping,...)	6.9%	2.4%	5.1%	5.6%	16.0%

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



What do they book?

	LZ	FUE	GC	TFE	LP
Room only	16.4%	9.3%	18.7%	18.5%	48.1%
Bed and Breakfast	8.6%	2.7%	8.3%	13.8%	11.5%
Half board	34.4%	25.8%	38.9%	39.4%	34.1%
Full board	0.6%	3.0%	1.9%	1.5%	0.5%
All inclusive	40.0%	59.2%	32.2%	26.8%	5.6%

Other expenses

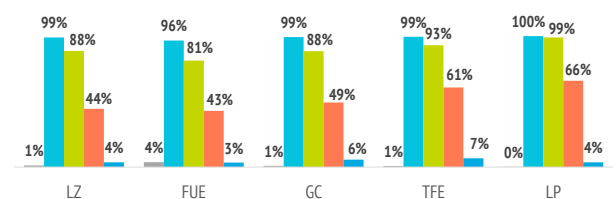
	LZ	FUE	GC	TFE	LP
Restaurants or cafes	56.9%	46.8%	58.4%	58.5%	83.3%
Supermarkets	52.8%	44.4%	59.8%	57.9%	87.8%
Car rental	49.4%	28.0%	25.6%	34.0%	78.0%
Organized excursions	33.8%	20.4%	23.5%	31.5%	23.9%
Taxi, transfer, chauffeur service	54.9%	65.5%	59.8%	49.1%	32.1%
Theme Parks	4.7%	6.1%	5.7%	14.3%	1.3%
Sport activities	8.3%	9.3%	6.7%	5.4%	9.1%
Museums	23.8%	3.3%	4.2%	3.6%	12.9%
Flights between islands	4.8%	2.4%	3.3%	2.9%	4.0%

Activities in the Canary Islands

Outdoor time per day	LZ	FUE	GC	TFE	LP
0 hours	1.3%	3.7%	0.9%	0.8%	0.2%
1 - 2 hours	10.3%	15.2%	10.7%	6.4%	1.1%
3 - 6 hours	44.0%	38.3%	39.2%	32.1%	32.9%
7 - 12 hours	40.8%	39.5%	43.5%	54.0%	62.1%
More than 12 hours	3.6%	3.3%	5.6%	6.7%	3.6%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

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



Activities in the Canary Islands	LZ	FUE	GC	TFE	LP
Beach	76.9%	90.9%	81.4%	70.7%	67.1%
Walk, wander	56.0%	48.2%	50.5%	61.5%	88.5%
Explore the island on their own	67.7%	41.5%	48.6%	57.1%	80.0%
Swimming pool, hotel facilities	45.2%	47.1%	43.7%	37.8%	22.3%
Taste Canarian gastronomy	33.1%	23.2%	30.9%	35.4%	49.7%
Organized excursions	24.8%	15.1%	18.7%	24.7%	12.7%
Sport activities	22.4%	22.3%	15.9%	15.6%	14.5%
Activities at sea	15.1%	17.2%	14.2%	13.2%	18.5%
Theme parks	6.8%	10.1%	10.6%	29.2%	1.3%
Nature activities	14.0%	10.7%	11.8%	18.7%	29.8%
Wineries / markets / popular festivals	32.4%	8.1%	10.1%	9.4%	26.1%
Sea excursions / whale watching	8.4%	7.1%	13.1%	17.1%	15.3%
Museums / exhibitions	33.2%	6.0%	9.0%	8.3%	21.9%
Nightlife / concerts / shows	4.3%	5.0%	16.7%	8.4%	3.8%
Astronomical observation	3.1%	4.1%	4.0%	5.7%	11.2%
Beauty and health treatments	4.0%	4.5%	5.8%	4.1%	2.7%

* Multi-choice question

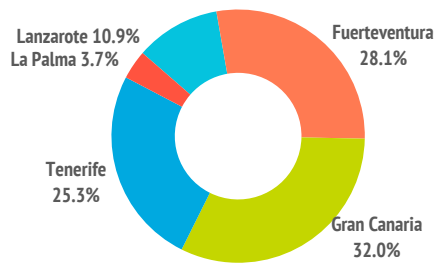
CANARY ISLANDS



TOURIST PROFILE BY ISLAND OF STAY (2018)

GERMANY

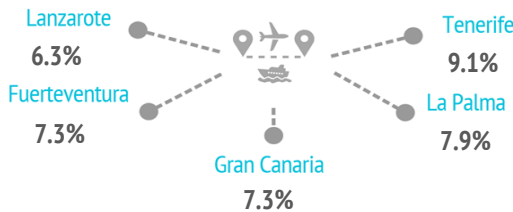
Which island do they choose?



How many islands do they visit during their trip?

	LZ	FUE	GC	TFE	LP
One island	93.7%	92.7%	92.7%	90.9%	92.1%
Two islands	5.8%	6.5%	5.3%	7.8%	6.2%
Three or more islands	0.5%	0.7%	2.1%	1.3%	1.7%

% TOURISTS VISITING MORE THAN ONE ISLAND



Internet usage during their trip

	LZ	FUE	GC	TFE	LP
Research					
- Tourist package	20.2%	17.5%	17.9%	16.6%	13.7%
- Flights	14.2%	16.6%	13.2%	11.0%	12.3%
- Accommodation	24.0%	23.1%	23.0%	20.1%	21.5%
- Transport	13.9%	14.8%	16.9%	17.2%	14.6%
- Restaurants	18.9%	19.7%	22.4%	26.9%	34.0%
- Excursions	31.0%	28.0%	28.7%	33.7%	36.3%
- Activities	35.1%	28.8%	32.9%	36.7%	39.2%
Book or purchase					
- Tourist package	34.4%	45.1%	37.4%	38.5%	33.0%
- Flights	42.7%	36.4%	45.6%	50.9%	60.2%
- Accommodation	35.8%	30.1%	34.6%	37.4%	48.9%
- Transport	31.1%	26.6%	22.1%	33.9%	48.6%
- Restaurants	4.6%	4.4%	4.5%	6.7%	5.7%
- Excursions	7.9%	6.3%	8.6%	16.5%	8.9%
- Activities	7.1%	7.1%	7.3%	15.2%	10.1%

* Multi-choice question

Internet usage in the Canary Islands	LZ	FUE	GC	TFE	LP
Did not use the Internet	7.7%	10.1%	9.4%	9.7%	8.7%
Used the Internet	92.3%	89.9%	90.6%	90.3%	91.3%
- Own Internet connection	29.9%	31.9%	33.1%	37.0%	33.1%
- Free Wifi connection	51.6%	45.8%	45.0%	39.7%	52.1%
Applications*					
- Search for locations or maps	64.5%	50.0%	60.5%	72.0%	73.3%
- Search for destination info	52.2%	39.3%	47.2%	52.9%	55.4%
- Share pictures or trip videos	54.5%	54.8%	55.4%	52.1%	50.7%
- Download tourist apps	7.6%	7.2%	5.8%	6.1%	6.7%
- Others	23.4%	28.1%	23.9%	18.8%	18.3%

* Multi-choice question

Which is the most visited place in each island?



The data refers to % of tourists on each island who have visited the place.

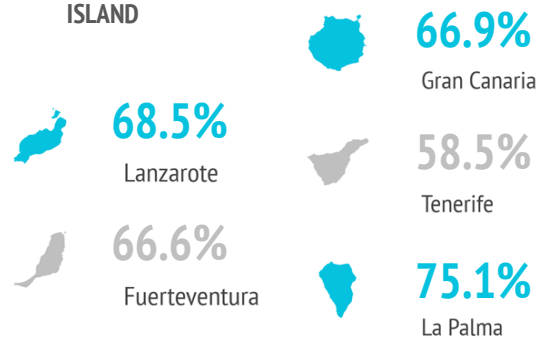
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	LZ	FUE	GC	TFE	LP
Average rating	8.59	8.50	8.44	8.44	8.79
Experience in the Canary Islands					
Worse or much worse than expected	1.6%	1.8%	1.1%	2.5%	0.9%
Lived up to expectations	56.8%	56.2%	60.9%	54.7%	57.6%
Better or much better than expected	41.6%	42.0%	38.0%	42.8%	41.5%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.67	8.67	8.49	8.35	8.90
Recommend visiting the Canary Islands	8.92	8.86	8.78	8.75	9.24

How many are loyal to the Canary Islands?

	LZ	FUE	GC	TFE	LP
Repeat tourists of the island	68.5%	66.6%	66.9%	58.5%	75.1%
At least 10 previous visits	8.6%	10.2%	11.3%	6.2%	7.6%
Repeat tourists	75.7%	71.4%	71.0%	63.5%	82.7%
At least 10 previous visits	16.6%	18.3%	17.0%	12.3%	18.5%

REPEAT TOURIST OF EACH ISLAND



TOURIST PROFILE BY ISLAND OF STAY (2018)

GERMANY

Where does the flight come from?



	LZ	FUE	GC	TFE	LP
Germany	95.7%	96.2%	92.8%	92.0%	84.5%
Spanish Mainland	1.0%	0.6%	2.4%	4.2%	14.7%
Switzerland	0.9%	2.2%	2.1%	1.9%	0.4%
Netherlands	0.7%	0.1%	0.2%	0.2%	0.2%
United Kingdom	0.1%	0.3%	0.1%	0.2%	0.1%
Austria	0.0%	0.2%	0.1%	0.3%	0.0%
Belgium	0.3%	0.0%	0.2%	0.1%	0.0%
Poland	0.0%	0.2%	0.0%	0.0%	0.0%
Sweden	0.0%	0.0%	0.0%	0.2%	0.0%
France	0.0%	0.1%	0.1%	0.0%	0.0%
Ireland	0.3%	0.0%	0.0%	0.0%	0.0%
Czech Republic	0.1%	0.0%	0.0%	0.0%	0.0%
Italy	0.1%	0.0%	0.0%	0.1%	0.0%
Norway	0.0%	0.0%	0.0%	0.1%	0.0%
Denmark	0.0%	0.0%	0.0%	0.1%	0.0%
Finland	0.1%	0.0%	0.0%	0.0%	0.0%
Others	0.7%	0.2%	1.8%	0.9%	0.0%

Who do they come with?



	LZ	FUE	GC	TFE	LP
Unaccompanied	6.2%	7.9%	11.4%	10.1%	7.0%
Only with partner	51.8%	54.7%	52.8%	53.5%	64.9%
Only with children (< 13 years old)	8.4%	6.1%	4.5%	5.8%	1.8%
Partner + children (< 13 years old)	10.0%	5.3%	5.3%	5.1%	5.2%
Other relatives	3.6%	5.2%	5.1%	5.3%	3.3%
Friends	3.5%	4.8%	8.4%	6.2%	5.4%
Work colleagues	0.0%	0.1%	0.3%	0.4%	0.2%
Organized trip	0.0%	0.4%	0.1%	0.2%	0.2%
Other combinations ⁽¹⁾	16.6%	15.6%	12.2%	13.5%	11.9%

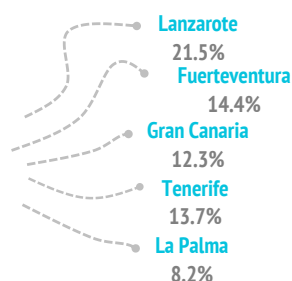
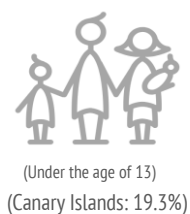
(1) Different situations have been isolated

Tourists with children	21.5%	14.4%	12.3%	13.7%	8.2%
- Between 0 and 2 years old	1.9%	1.3%	1.6%	1.4%	1.0%
- Between 3 and 12 years old	17.8%	12.0%	9.9%	11.5%	6.9%
- Between 0-2 and 3-12 years	1.8%	1.0%	0.9%	0.7%	0.2%

Tourists without children	78.5%	85.6%	87.7%	86.3%	91.8%
---------------------------	-------	-------	-------	-------	-------

Group composition:					
- 1 person	9.1%	10.1%	13.8%	16.6%	9.3%
- 2 people	54.6%	62.9%	63.0%	59.4%	71.5%
- 3 people	16.2%	12.4%	10.4%	11.5%	8.4%
- 4 or 5 people	18.6%	12.7%	11.5%	11.1%	8.8%
- 6 or more people	1.5%	1.8%	1.3%	1.5%	2.0%
Average group size:	2.55	2.40	2.27	2.27	2.26

TOURIST TRAVELLING WITH CHILDREN



Who are they?



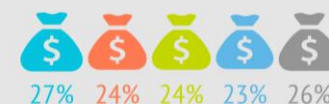
	LZ	FUE	GC	TFE	LP
Gender					
Men	57.7%	49.4%	51.1%	48.0%	45.6%
Women	42.3%	50.6%	48.9%	52.0%	54.4%
Age					
Average age (tourist > 15 years old)	48.6	48.2	46.2	45.1	52.3
Standard deviation	15.0	16.1	16.2	15.8	13.6
Age range (> 15 years old)					
16 - 24 years old	5.8%	8.8%	9.6%	9.3%	3.1%
25 - 30 years old	9.1%	9.3%	12.9%	15.7%	5.5%
31 - 45 years old	25.6%	23.8%	25.5%	24.8%	18.1%
46 - 60 years old	36.0%	33.3%	30.5%	31.6%	45.7%
Over 60 years old	23.5%	24.8%	21.5%	18.6%	27.6%
Occupation					
Salaried worker	56.7%	54.9%	57.0%	61.0%	53.1%
Self-employed	8.6%	7.7%	9.2%	8.3%	11.2%
Unemployed	0.2%	0.3%	0.2%	0.2%	0.1%
Business owner	11.8%	10.6%	11.9%	10.4%	11.0%
Student	4.0%	6.0%	5.9%	6.2%	3.6%
Retired	17.9%	19.5%	14.5%	12.5%	18.3%
Unpaid domestic work	0.4%	0.5%	0.6%	0.7%	0.7%
Others	0.4%	0.6%	0.7%	0.7%	2.0%
Annual household income level					
Less than €25,000	7.2%	12.8%	12.5%	13.0%	8.0%
€25,000 - €49,999	32.1%	34.1%	33.6%	34.8%	34.7%
€50,000 - €74,999	33.7%	29.2%	29.5%	28.9%	31.5%
More than €74,999	27.0%	23.9%	24.5%	23.3%	25.7%
Education level					
No studies	0.4%	0.2%	0.6%	0.3%	0.4%
Primary education	3.9%	4.7%	4.9%	4.0%	1.7%
Secondary education	20.4%	24.0%	24.7%	24.9%	18.9%
Higher education	75.3%	71.1%	69.9%	70.8%	79.0%



AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.