

PROFILE OF TOURIST BY ASPECTS INFLUENCING THE DESTINATION CHOICE (2018)

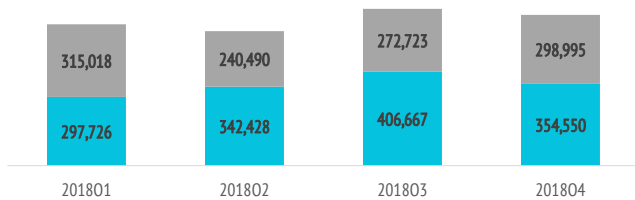
AUTHENTICITY

How many are they and how much do they spend?

| | Authenticity | Total |
|---|------------------|-------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | n.d. | 15,559,787 |
| Tourist arrivals > 15 years old (EGT) | 2,528,598 | 13,485,651 |
| - book holiday package | 1,401,372 | 7,848,516 |
| - do not book holiday package | 1,127,227 | 5,637,135 |
| - % tourists who book holiday package | 55.4% | 58.2% |
| Share of total tourist | 19.1% | 100% |

TOURISTS MOTIVATED BY AUTHENTICITY

■ do not book holiday package ■ book holiday package



| | Authenticity | Total |
|--|--------------|---------------|
| Expenditure per tourist (€) | 1,201 | 1,196 |
| - book holiday package | 1,319 | 1,309 |
| - holiday package | 1,064 | 1,064 |
| - others | 254 | 246 |
| - do not book holiday package | 1,055 | 1,037 |
| - flight | 292 | 288 |
| - accommodation | 334 | 350 |
| - others | 430 | 399 |
| Average length of stay | 9.49 | 9.32 |
| - book holiday package | 8.66 | 8.66 |
| - do not book holiday package | 10.52 | 10.23 |
| Average daily expenditure (€) | 141.3 | 143.6 |
| - book holiday package | 160.3 | 159.8 |
| - do not book holiday package | 117.7 | 121.0 |
| Total turnover (> 15 years old) (€m) | 3,037 | 16,124 |
| - book holiday package | 1,848 | 10,277 |
| - do not book holiday package | 1,190 | 5,848 |

AVERAGE LENGTH OF STAY (nights)

■ Authenticity ■ Total



EXPENDITURE PER TOURIST (€)

■ Authenticity ■ Total



Importance of each factor in the destination choice

| | Authenticity | Total |
|----------------------|--------------|-------|
| Authenticity | 100% | 19.1% |
| Climate | 83.2% | 78.1% |
| Safety | 74.8% | 51.4% |
| Tranquility | 73.1% | 46.2% |
| Price | 59.6% | 36.5% |
| Sea | 59.4% | 43.3% |
| Landscapes | 58.3% | 31.6% |
| European belonging | 57.7% | 35.8% |
| Environment | 57.1% | 30.6% |
| Accommodation supply | 55.6% | 41.7% |
| Effortless trip | 54.4% | 34.8% |
| Beaches | 51.0% | 37.1% |
| Gastronomy | 42.9% | 22.6% |
| Exoticism | 40.5% | 10.5% |
| Fun possibilities | 35.4% | 20.7% |
| Historical heritage | 21.6% | 7.1% |
| Culture | 21.3% | 7.3% |
| Shopping | 20.3% | 9.6% |
| Hiking trail network | 17.5% | 9.0% |
| Nightlife | 14.1% | 7.5% |

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 is the main motivation for their holidays?

| | Authenticity | Total |
|-------------------------|--------------|-------|
| Rest | 49.3% | 55.1% |
| Enjoy family time | 13.7% | 14.7% |
| Have fun | 7.9% | 7.8% |
| Explore the destination | 25.5% | 18.5% |
| Practice their hobbies | 1.4% | 1.8% |
| Other reasons | 2.2% | 2.1% |

EXPLORE THE DESTINATION



Authenticity  25.5%

Total  18.5%

How far in advance do they book their trip?

| | Authenticity | Total |
|------------------------|--------------|-------|
| The same day | 0.8% | 0.7% |
| Between 1 and 30 days | 23.4% | 23.2% |
| Between 1 and 2 months | 23.0% | 23.0% |
| Between 3 and 6 months | 31.7% | 32.4% |
| More than 6 months | 21.2% | 20.7% |

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

AUTHENTICITY
21.2%



TOTAL
20.7%

Picture: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports. Profile of tourist who indicate that authenticity is "very important" in their choice.

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

AUTHENTICITY

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

| | Authenticity | Total |
|---------------------------------------|--------------|-------|
| Previous visits to the Canary Islands | 49.7% | 50.9% |
| Friends or relatives | 30.3% | 27.8% |
| Internet or social media | 54.4% | 56.1% |
| Mass Media | 2.7% | 1.7% |
| Travel guides and magazines | 11.5% | 9.5% |
| Travel Blogs or Forums | 6.4% | 5.4% |
| Travel TV Channels | 1.1% | 0.7% |
| Tour Operator or Travel Agency | 23.0% | 24.7% |
| Public administrations or similar | 0.6% | 0.4% |
| Others | 2.6% | 2.3% |

* Multi-choice question

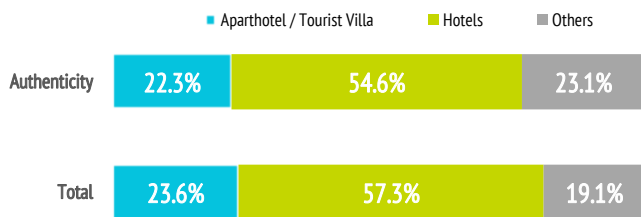
With whom did they book their flight and accommodation?

| | Authenticity | Total |
|-----------------------------------|--------------|-------|
| Flight | | |
| - Directly with the airline | 43.0% | 39.5% |
| - Tour Operator or Travel Agency | 57.0% | 60.5% |
| Accommodation | | |
| - Directly with the accommodation | 31.7% | 28.8% |
| - Tour Operator or Travel Agency | 68.3% | 71.2% |

Where do they stay?

| | Authenticity | Total |
|---|--------------|-------|
| 1-2-3* Hotel | 12.3% | 12.8% |
| 4* Hotel | 35.3% | 37.7% |
| 5* Hotel / 5* Luxury Hotel | 6.9% | 6.8% |
| Aparthotel / Tourist Villa | 22.3% | 23.6% |
| House/room rented in a private dwelling | 6.3% | 5.3% |
| Private accommodation (1) | 9.4% | 7.0% |
| Others (Cottage, cruise, camping,...) | 7.5% | 6.8% |

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



What do they book?

| | Authenticity | Total |
|-------------------|--------------|-------|
| Room only | 29.0% | 28.8% |
| Bed and Breakfast | 11.4% | 11.7% |
| Half board | 22.1% | 22.4% |
| Full board | 3.2% | 3.0% |
| All inclusive | 34.3% | 34.1% |

”
34.3% of tourists book all inclusive.
(Canary Islands: 34.1%)

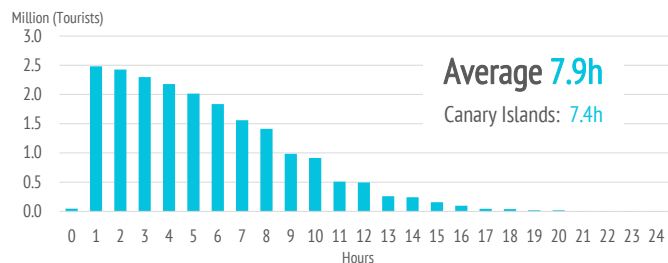
Other expenses

| | Authenticity | Total |
|-----------------------------------|--------------|-------|
| Restaurants or cafes | 62.3% | 63.2% |
| Supermarkets | 54.9% | 55.9% |
| Car rental | 31.2% | 26.6% |
| Organized excursions | 24.6% | 21.8% |
| Taxi, transfer, chauffeur service | 47.7% | 51.7% |
| Theme Parks | 8.6% | 8.8% |
| Sport activities | 6.1% | 6.4% |
| Museums | 6.8% | 5.0% |
| Flights between islands | 6.0% | 4.8% |

Activities in the Canary Islands

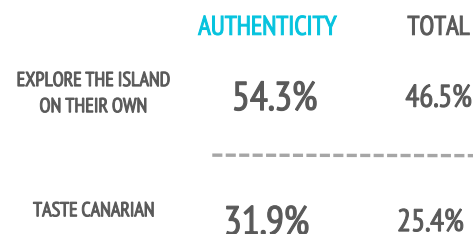
| Outdoor time per day | Authenticity | Total |
|----------------------|--------------|-------|
| 0 hours | 1.8% | 2.2% |
| 1 - 2 hours | 7.2% | 10.0% |
| 3 - 6 hours | 29.2% | 32.6% |
| 7 - 12 hours | 51.5% | 46.5% |
| More than 12 hours | 10.3% | 8.7% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | Authenticity | Total |
|--|--------------|-------|
| Walk, wander | 73.1% | 71.0% |
| Beach | 72.1% | 68.0% |
| Swimming pool, hotel facilities | 56.1% | 58.9% |
| Explore the island on their own | 54.3% | 46.5% |
| Taste Canarian gastronomy | 31.9% | 25.4% |
| Organized excursions | 20.5% | 17.9% |
| Nightlife / concerts / shows | 16.8% | 15.5% |
| Theme parks | 16.6% | 15.5% |
| Wineries / markets / popular festivals | 15.7% | 12.0% |
| Sport activities | 15.2% | 14.3% |
| Museums / exhibitions | 14.0% | 9.8% |
| Nature activities | 13.8% | 10.0% |
| Sea excursions / whale watching | 13.2% | 11.3% |
| Activities at sea | 12.2% | 9.8% |
| Beauty and health treatments | 6.5% | 5.7% |
| Astronomical observation | 4.7% | 3.4% |

* Multi-choice question



PROFILE OF TOURIST BY ASPECTS INFLUENCING THE DESTINATION CHOICE (2018)

AUTHENTICITY

Which island do they choose?

| Tourist > 15 years old | Canarias | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|--------------------------------------|------------|-----------|---------------|--------------|-----------|----------|
| Tourists motivated by authenticity | 2,528,598 | 489,828 | 377,931 | 600,540 | 961,498 | 73,844 |
| - Share by islands | 100% | 19.4% | 14.9% | 23.7% | 38.0% | 2.9% |
| Total tourists | 13,485,651 | 2,457,120 | 1,856,705 | 3,825,110 | 4,991,173 | 249,069 |
| - Share by islands | 100% | 18.2% | 13.8% | 28.4% | 37.0% | 1.8% |
| % Tourists motivated by authenticity | 19.1% | 20.2% | 20.6% | 16.3% | 19.6% | 30.1% |

How many islands do they visit during their trip?

| | Authenticity | Total |
|-----------------------|--------------|-------|
| One island | 88.9% | 90.9% |
| Two islands | 9.3% | 7.7% |
| Three or more islands | 1.9% | 1.4% |

Internet usage during their trip

| | Authenticity | Total |
|-------------------------|--------------|-------|
| Research | | |
| - Tourist package | 16.4% | 15.4% |
| - Flights | 13.5% | 13.0% |
| - Accommodation | 17.4% | 17.7% |
| - Transport | 17.0% | 15.6% |
| - Restaurants | 28.9% | 27.0% |
| - Excursions | 29.2% | 26.3% |
| - Activities | 33.2% | 31.0% |
| Book or purchase | | |
| - Tourist package | 36.1% | 38.1% |
| - Flights | 64.8% | 64.4% |
| - Accommodation | 55.5% | 54.5% |
| - Transport | 47.3% | 44.7% |
| - Restaurants | 13.9% | 10.5% |
| - Excursions | 15.3% | 11.4% |
| - Activities | 16.5% | 12.5% |

* Multi-choice question

| Internet usage in the Canary Islands | Authenticity | Total |
|--------------------------------------|--------------|--------------|
| Did not use the Internet | 10.6% | 9.8% |
| Used the Internet | 89.4% | 90.2% |
| - Own Internet connection | 38.6% | 36.5% |
| - Free Wifi connection | 35.8% | 41.1% |
| Applications* | | |
| - Search for locations or maps | 64.6% | 60.7% |
| - Search for destination info | 46.7% | 44.7% |
| - Share pictures or trip videos | 59.0% | 55.6% |
| - Download tourist apps | 8.3% | 6.5% |
| - Others | 19.5% | 23.9% |

* Multi-choice question

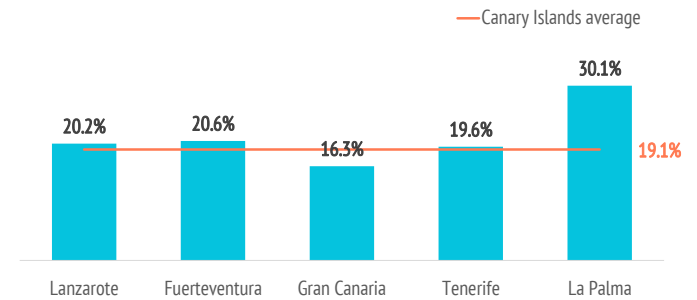


59% of tourists share pictures or trip videos during their stay in the Canary Islands

(Canary Islands: 55.6%)



% TOURISTS BY ISLANDS

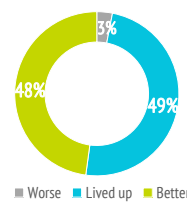


How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Authenticity | Total |
|---------------------------|--------------|-------|
| Average rating | 8.92 | 8.58 |

| Experience in the Canary Islands | Authenticity | Total |
|-------------------------------------|--------------|-------|
| Worse or much worse than expected | 3.1% | 2.9% |
| Lived up to expectations | 49.1% | 57.4% |
| Better or much better than expected | 47.8% | 39.7% |

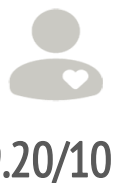
| Future intentions (scale 1-10) | Authenticity | Total |
|---------------------------------------|--------------|-------|
| Return to the Canary Islands | 8.92 | 8.60 |
| Recommend visiting the Canary Islands | 9.20 | 8.86 |



Experience in the Canary



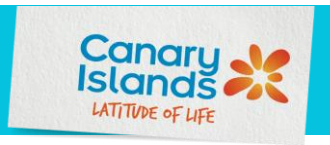
Return to the Canary Islands



Recommend visiting the Canary Islands

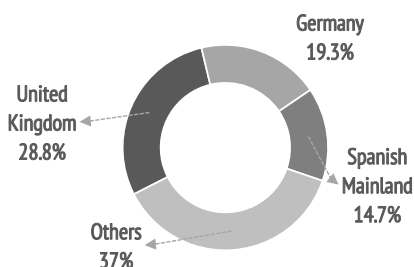
How many are loyal to the Canary Islands?

| | Authenticity | Total |
|---|--------------|--------------|
| Repeat tourists | 68.4% | 71.0% |
| Repeat tourists (last 5 years) | 62.8% | 64.6% |
| Repeat tourists (last 5 years) (5 or more visits) | 19.3% | 18.4% |
| At least 10 previous visits | 17.0% | 17.8% |



Where are they from? 

| | % | Absolute |
|------------------|-------|----------|
| United Kingdom | 28.8% | 727,007 |
| Germany | 19.3% | 486,917 |
| Spanish Mainland | 14.7% | 372,692 |
| France | 6.6% | 167,287 |
| Italy | 4.2% | 105,858 |
| Poland | 3.8% | 96,313 |
| Ireland | 3.8% | 96,105 |
| Belgium | 2.7% | 67,393 |
| Sweden | 2.4% | 60,796 |
| Netherlands | 2.4% | 60,588 |
| Switzerland | 2.3% | 57,787 |
| Denmark | 1.2% | 29,973 |
| Austria | 1.0% | 26,105 |
| Norway | 0.9% | 23,542 |
| Russia | 0.7% | 18,364 |
| Czech Republic | 0.6% | 15,738 |
| Finland | 0.5% | 11,454 |
| Others | 4.1% | 104,678 |



Who do they come with? 

| | Authenticity | Total |
|-------------------------------------|--------------|-------|
| Unaccompanied | 9.5% | 8.9% |
| Only with partner | 47.3% | 47.4% |
| Only with children (< 13 years old) | 6.2% | 5.9% |
| Partner + children (< 13 years old) | 6.5% | 7.2% |
| Other relatives | 9.3% | 9.0% |
| Friends | 6.5% | 6.3% |
| Work colleagues | 0.3% | 0.5% |
| Organized trip | 0.2% | 0.2% |
| Other combinations ⁽¹⁾ | 14.2% | 14.6% |

(1) Different situations have been isolated

| | | |
|----------------------------------|--------------|--------------|
| Tourists with children | 18.7% | 19.3% |
| - Between 0 and 2 years old | 1.7% | 1.8% |
| - Between 3 and 12 years old | 15.5% | 15.8% |
| - Between 0 -2 and 3-12 years | 1.4% | 1.6% |
| Tourists without children | 81.3% | 80.7% |
| Group composition: | | |
| - 1 person | 13.7% | 12.4% |
| - 2 people | 53.7% | 54.1% |
| - 3 people | 12.7% | 12.6% |
| - 4 or 5 people | 16.3% | 17.1% |
| - 6 or more people | 3.5% | 3.8% |
| Average group size: | 2.54 | 2.58 |

Who are they? 

| | Authenticity | Total |
|--------------------------------------|--------------|-------|
| Gender | | |
| Men | 43.5% | 48.2% |
| Women | 56.5% | 51.8% |
| Age | | |
| Average age (tourist > 15 years old) | 45.8 | 46.7 |
| Standard deviation | 15.4 | 15.3 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 8.1% | 7.7% |
| 25 - 30 years old | 12.7% | 10.8% |
| 31 - 45 years old | 29.5% | 28.6% |
| 46 - 60 years old | 29.3% | 31.3% |
| Over 60 years old | 20.5% | 21.5% |
| Occupation | | |
| Salaried worker | 55.3% | 55.5% |
| Self-employed | 11.4% | 11.0% |
| Unemployed | 1.4% | 1.1% |
| Business owner | 9.2% | 9.2% |
| Student | 4.6% | 4.2% |
| Retired | 16.4% | 17.3% |
| Unpaid domestic work | 1.0% | 0.9% |
| Others | 0.8% | 0.8% |
| Annual household income level | | |
| Less than €25,000 | 20.8% | 17.0% |
| €25,000 - €49,999 | 37.6% | 36.5% |
| €50,000 - €74,999 | 22.9% | 25.0% |
| More than €74,999 | 18.7% | 21.5% |
| Education level | | |
| No studies | 4.1% | 4.8% |
| Primary education | 2.6% | 2.8% |
| Secondary education | 21.7% | 23.1% |
| Higher education | 71.6% | 69.3% |


3 IN 10 TOURISTS ARE
BRITISH
46 YEARS OLD
 AVERAGE AGE
47% ONLY WITH PARTNER

Pictures: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports. Profile of tourist who indicate that authenticity is "very important" in their choice.

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