

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

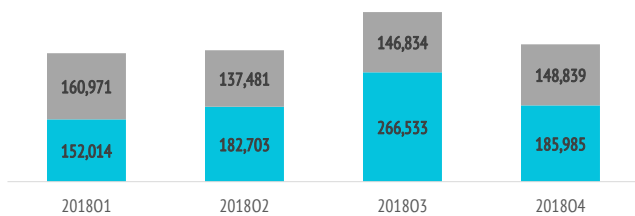
## EXOTICISM

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

|   | Exoticism        | Total             |
|---|------------------|-------------------|
| <b>TOURISTS</b>                                 |                  |                   |
| <b>Tourist arrivals (FRONTUR)</b>               | n.d.             | <b>15,559,787</b> |
| <b>Tourist arrivals &gt; 15 years old (EGT)</b> | <b>1,381,359</b> | <b>13,485,651</b> |
| - book holiday package                          | 787,235          | 7,848,516         |
| - do not book holiday package                   | 594,124          | 5,637,135         |
| - % tourists who book holiday package           | 57.0%            | 58.2%             |
| Share of total tourist                          | 10.5%            | 100%              |

### TOURISTS MOTIVATED BY EXOTICISM

■ do not book holiday package ■ book holiday package



|  | Exoticism    | Total         |
|--|--------------|---------------|
| <b>Expenditure per tourist (€)</b>             | <b>1,174</b> | <b>1,196</b>  |
| - book holiday package                         | 1,266        | 1,309         |
| - holiday package                              | 1,010        | 1,064         |
| - others                                       | 256          | 246           |
| - do not book holiday package                  | 1,054        | 1,037         |
| - flight                                       | 285          | 288           |
| - accommodation                                | 329          | 350           |
| - others                                       | 440          | 399           |
| <b>Average length of stay</b>                  | <b>9.08</b>  | <b>9.32</b>   |
| - book holiday package                         | 8.37         | 8.66          |
| - do not book holiday package                  | 10.01        | 10.23         |
| <b>Average daily expenditure (€)</b>           | <b>142.6</b> | <b>143.6</b>  |
| - book holiday package                         | 159.3        | 159.8         |
| - do not book holiday package                  | 120.4        | 121.0         |
| <b>Total turnover (&gt; 15 years old) (€m)</b> | <b>1,622</b> | <b>16,124</b> |
| - book holiday package                         | 996          | 10,277        |
| - do not book holiday package                  | 626          | 5,848         |

### AVERAGE LENGTH OF STAY (nights)

■ Exoticism ■ Total



### EXPENDITURE PER TOURIST (€)

■ Exoticism ■ Total



### Importance of each factor in the destination choice

|                      | Exoticism | Total |
|----------------------|-----------|-------|
| Exoticism            | 100%      | 10.5% |
| Climate              | 85.0%     | 78.1% |
| Tranquility          | 74.1%     | 46.2% |
| Authenticity         | 74.1%     | 19.1% |
| Safety               | 72.7%     | 51.4% |
| Price                | 69.5%     | 36.5% |
| European belonging   | 63.5%     | 35.8% |
| Sea                  | 63.4%     | 43.3% |
| Landscapes           | 60.4%     | 31.6% |
| Beaches              | 57.5%     | 37.1% |
| Accommodation supply | 55.7%     | 41.7% |
| Environment          | 54.8%     | 30.6% |
| Effortless trip      | 50.4%     | 34.8% |
| Fun possibilities    | 44.3%     | 20.7% |
| Gastronomy           | 42.6%     | 22.6% |
| Shopping             | 25.5%     | 9.6%  |
| Historical heritage  | 22.3%     | 7.1%  |
| Culture              | 22.2%     | 7.3%  |
| Nightlife            | 20.8%     | 7.5%  |
| Hiking trail network | 18.5%     | 9.0%  |

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?

|                         | Exoticism | Total |
|-------------------------|-----------|-------|
| Rest                    | 48.6%     | 55.1% |
| Enjoy family time       | 13.4%     | 14.7% |
| Have fun                | 10.8%     | 7.8%  |
| Explore the destination | 24.3%     | 18.5% |
| Practice their hobbies  | 1.3%      | 1.8%  |
| Other reasons           | 1.6%      | 2.1%  |

### EXPLORE THE DESTINATION



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

|                        | Exoticism | Total |
|------------------------|-----------|-------|
| The same day           | 1.2%      | 0.7%  |
| Between 1 and 30 days  | 25.6%     | 23.2% |
| Between 1 and 2 months | 23.6%     | 23.0% |
| Between 3 and 6 months | 30.1%     | 32.4% |
| More than 6 months     | 19.5%     | 20.7% |

### % TOURISTS BOOKING BETWEEN 1 AND 30 DAYS IN ADVANCE

EXOTICISM  
25.6%



TOTAL  
23.2%

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 exoticism 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.

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

## EXOTICISM



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

|                                       | Exoticism | Total |
|---------------------------------------|-----------|-------|
| Previous visits to the Canary Islands | 41.8%     | 50.9% |
| Friends or relatives                  | 31.2%     | 27.8% |
| Internet or social media              | 54.9%     | 56.1% |
| Mass Media                            | 2.5%      | 1.7%  |
| Travel guides and magazines           | 10.1%     | 9.5%  |
| Travel Blogs or Forums                | 6.7%      | 5.4%  |
| Travel TV Channels                    | 1.0%      | 0.7%  |
| Tour Operator or Travel Agency        | 23.5%     | 24.7% |
| Public administrations or similar     | 0.7%      | 0.4%  |
| Others                                | 2.6%      | 2.3%  |

\* Multi-choice question

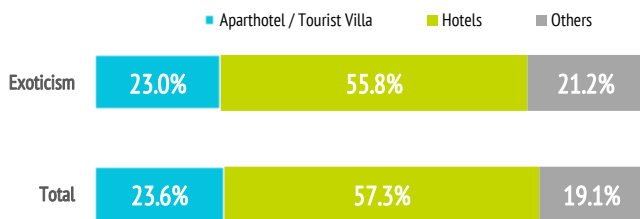
### With whom did they book their flight and accommodation?

|                                   | Exoticism | Total |
|-----------------------------------|-----------|-------|
| <b>Flight</b>                     |           |       |
| - Directly with the airline       | 41.6%     | 39.5% |
| - Tour Operator or Travel Agency  | 58.4%     | 60.5% |
| <b>Accommodation</b>              |           |       |
| - Directly with the accommodation | 30.7%     | 28.8% |
| - Tour Operator or Travel Agency  | 69.3%     | 71.2% |

### Where do they stay?

|   | Exoticism | Total |
|---|-----------|-------|
| 1-2-3* Hotel                            | 13.0%     | 12.8% |
| 4* Hotel                                | 36.3%     | 37.7% |
| 5* Hotel / 5* Luxury Hotel              | 6.5%      | 6.8%  |
| Aparthotel / Tourist Villa              | 23.0%     | 23.6% |
| House/room rented in a private dwelling | 5.6%      | 5.3%  |
| Private accommodation (1)               | 8.6%      | 7.0%  |
| Others (Cottage, cruise, camping,...)   | 7.0%      | 6.8%  |

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



### What do they book?

|                   | Exoticism | Total |
|-------------------|-----------|-------|
| Room only         | 26.1%     | 28.8% |
| Bed and Breakfast | 11.9%     | 11.7% |
| Half board        | 19.9%     | 22.4% |
| Full board        | 3.5%      | 3.0%  |
| All inclusive     | 38.6%     | 34.1% |

”  
**38.6%** of tourists book all inclusive.  
 (Canary Islands: 34.1%)

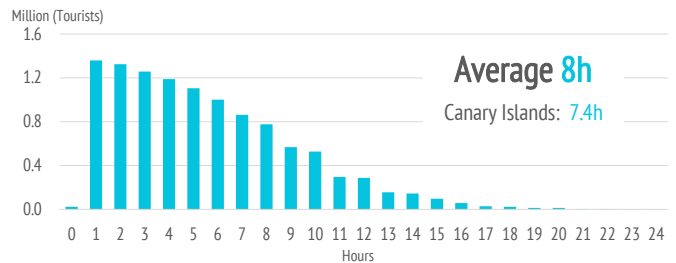
### Other expenses

|                                   | Exoticism | Total |
|-----------------------------------|-----------|-------|
| Restaurants or cafes              | 60.1%     | 63.2% |
| Supermarkets                      | 52.9%     | 55.9% |
| Car rental                        | 28.4%     | 26.6% |
| Organized excursions              | 26.2%     | 21.8% |
| Taxi, transfer, chauffeur service | 48.9%     | 51.7% |
| Theme Parks                       | 10.4%     | 8.8%  |
| Sport activities                  | 6.9%      | 6.4%  |
| Museums                           | 5.0%      | 5.0%  |
| Flights between islands           | 6.6%      | 4.8%  |

### Activities in the Canary Islands

| Outdoor time per day | Exoticism | Total |
|----------------------|-----------|-------|
| 0 hours              | 1.6%      | 2.2%  |
| 1 - 2 hours          | 7.3%      | 10.0% |
| 3 - 6 hours          | 28.6%     | 32.6% |
| 7 - 12 hours         | 51.2%     | 46.5% |
| More than 12 hours   | 11.2%     | 8.7%  |

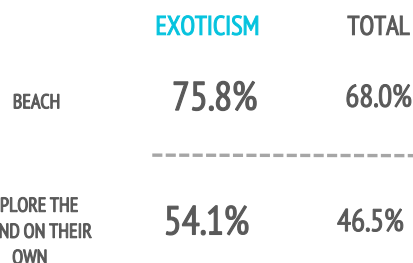
### TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



### Activities in the Canary Islands

|  | Exoticism | Total |
|--|-----------|-------|
| Beach                                  | 75.8%     | 68.0% |
| Walk, wander                           | 73.3%     | 71.0% |
| Swimming pool, hotel facilities        | 61.9%     | 58.9% |
| Explore the island on their own        | 54.1%     | 46.5% |
| Taste Canarian gastronomy              | 29.1%     | 25.4% |
| Organized excursions                   | 23.1%     | 17.9% |
| Theme parks                            | 20.8%     | 15.5% |
| Nightlife / concerts / shows           | 20.0%     | 15.5% |
| Sea excursions / whale watching        | 16.8%     | 11.3% |
| Sport activities                       | 16.3%     | 14.3% |
| Wineries / markets / popular festivals | 14.6%     | 12.0% |
| Nature activities                      | 13.3%     | 10.0% |
| Activities at sea                      | 12.5%     | 9.8%  |
| Museums / exhibitions                  | 12.1%     | 9.8%  |
| Beauty and health treatments           | 7.1%      | 5.7%  |
| Astronomical observation               | 5.1%      | 3.4%  |

\* Multi-choice question



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

## EXOTICISM

### Which island do they choose?

| Tourist > 15 years old            | Canarias   | Lanzarote | Fuerteventura | Gran Canaria | Tenerife  | La Palma |
|-----------------------------------|------------|-----------|---------------|--------------|-----------|----------|
| Tourists motivated by exoticism   | 1,381,359  | 210,200   | 196,575       | 362,197      | 579,056   | 25,302   |
| - Share by islands                | 100%       | 15.2%     | 14.2%         | 26.2%        | 41.9%     | 1.8%     |
| 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 exoticism | 10.5%      | 8.6%      | 10.7%         | 9.8%         | 11.8%     | 10.3%    |

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

|                       | Exoticism | Total |
|-----------------------|-----------|-------|
| One island            | 87.7%     | 90.9% |
| Two islands           | 10.4%     | 7.7%  |
| Three or more islands | 1.9%      | 1.4%  |

### Internet usage during their trip

|                         | Exoticism | Total |
|-------------------------|-----------|-------|
| <b>Research</b>         |           |       |
| - Tourist package       | 17.8%     | 15.4% |
| - Flights               | 14.3%     | 13.0% |
| - Accommodation         | 17.1%     | 17.7% |
| - Transport             | 18.6%     | 15.6% |
| - Restaurants           | 30.2%     | 27.0% |
| - Excursions            | 31.4%     | 26.3% |
| - Activities            | 35.2%     | 31.0% |
| <b>Book or purchase</b> |           |       |
| - Tourist package       | 35.8%     | 38.1% |
| - Flights               | 64.8%     | 64.4% |
| - Accommodation         | 56.3%     | 54.5% |
| - Transport             | 46.7%     | 44.7% |
| - Restaurants           | 14.6%     | 10.5% |
| - Excursions            | 16.3%     | 11.4% |
| - Activities            | 17.8%     | 12.5% |

\* Multi-choice question

| Internet usage in the Canary Islands | Exoticism    | Total        |
|--------------------------------------|--------------|--------------|
| <b>Did not use the Internet</b>      | <b>10.9%</b> | <b>9.8%</b>  |
| <b>Used the Internet</b>             | <b>89.1%</b> | <b>90.2%</b> |
| - Own Internet connection            | 40.0%        | 36.5%        |
| - Free Wifi connection               | 32.0%        | 41.1%        |
| <b>Applications*</b>                 |              |              |
| - Search for locations or maps       | 68.1%        | 60.7%        |
| - Search for destination info        | 47.5%        | 44.7%        |
| - Share pictures or trip videos      | 62.2%        | 55.6%        |
| - Download tourist apps              | 9.7%         | 6.5%         |
| - Others                             | 17.9%        | 23.9%        |

\* Multi-choice question

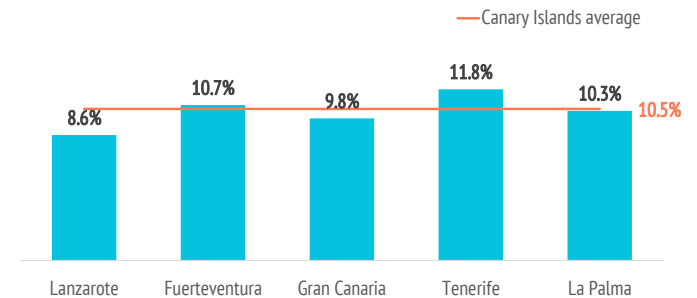


**62.2%** of tourists share pictures or trip videos during their stay in the Canary Islands

(Canary Islands: 55.6%)



### % TOURISTS BY ISLANDS

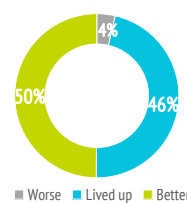


### How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Exoticism | Total |
|---------------------------|-----------|-------|
| Average rating            | 8.90      | 8.58  |

| Experience in the Canary Islands    | Exoticism | Total |
|-------------------------------------|-----------|-------|
| Worse or much worse than expected   | 3.6%      | 2.9%  |
| Lived up to expectations            | 46.5%     | 57.4% |
| Better or much better than expected | 49.9%     | 39.7% |

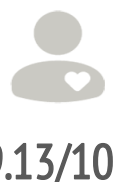
| Future intentions (scale 1-10)        | Exoticism | Total |
|---------------------------------------|-----------|-------|
| Return to the Canary Islands          | 8.83      | 8.60  |
| Recommend visiting the Canary Islands | 9.13      | 8.86  |



Experience in the Canary



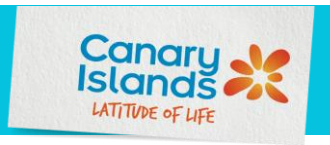
Return to the Canary Islands



Recommend visiting the Canary Islands

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

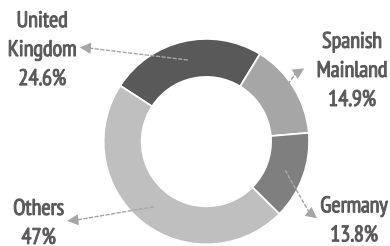
|   | Exoticism    | Total        |
|---|--------------|--------------|
| <b>Repeat tourists</b>                            | <b>60.9%</b> | <b>71.0%</b> |
| Repeat tourists (last 5 years)                    | 55.1%        | 64.6%        |
| Repeat tourists (last 5 years) (5 or more visits) | 15.4%        | 18.4%        |
| <b>At least 10 previous visits</b>                | <b>12.9%</b> | <b>17.8%</b> |



Where are they from?



|                  | %     | Absolute |
|------------------|-------|----------|
| United Kingdom   | 24.6% | 339,355  |
| Spanish Mainland | 14.9% | 205,774  |
| Germany          | 13.8% | 190,748  |
| France           | 8.5%  | 116,730  |
| Poland           | 6.0%  | 82,980   |
| Netherlands      | 5.5%  | 75,600   |
| Belgium          | 4.4%  | 61,357   |
| Italy            | 3.8%  | 53,160   |
| Ireland          | 3.2%  | 43,763   |
| Denmark          | 2.4%  | 33,075   |
| Sweden           | 1.7%  | 23,789   |
| Switzerland      | 1.5%  | 20,963   |
| Norway           | 1.3%  | 18,445   |
| Russia           | 1.0%  | 13,449   |
| Finland          | 0.8%  | 11,122   |
| Czech Republic   | 0.7%  | 10,233   |
| Austria          | 0.7%  | 9,736    |
| Others           | 5.1%  | 71,077   |



Who do they come with?



|  | Exoticism    | Total        |
|--|--------------|--------------|
| Unaccompanied                                      | 9.0%         | 8.9%         |
| Only with partner                                  | 44.4%        | 47.4%        |
| Only with children (< 13 years old)                | 7.6%         | 5.9%         |
| Partner + children (< 13 years old)                | 6.4%         | 7.2%         |
| Other relatives                                    | 10.2%        | 9.0%         |
| Friends  | 7.6%         | 6.3%         |
| Work colleagues                                    | 0.3%         | 0.5%         |
| Organized trip                                     | 0.2%         | 0.2%         |
| Other combinations <sup>(1)</sup>                  | 14.4%        | 14.6%        |
| <i>(1) Different situations have been isolated</i> |              |              |
| <b>Tourists with children</b>                      | <b>20.3%</b> | <b>19.3%</b> |
| - Between 0 and 2 years old                        | 2.0%         | 1.8%         |
| - Between 3 and 12 years old                       | 16.6%        | 15.8%        |
| - Between 0 -2 and 3-12 years                      | 1.7%         | 1.6%         |
| <b>Tourists without children</b>                   | <b>79.7%</b> | <b>80.7%</b> |
| <b>Group composition:</b>                          |              |              |
| - 1 person   | 12.9%        | 12.4%        |
| - 2 people   | 52.5%        | 54.1%        |
| - 3 people   | 14.0%        | 12.6%        |
| - 4 or 5 people                                    | 17.4%        | 17.1%        |
| - 6 or more people                                 | 3.2%         | 3.8%         |
| <b>Average group size:</b>                         | <b>2.56</b>  | <b>2.58</b>  |

Who are they?



|                                      | Exoticism | Total |
|--------------------------------------|-----------|-------|
| <b>Gender</b>                        |           |       |
| Men                                  | 47.2%     | 48.2% |
| Women                                | 52.8%     | 51.8% |
| <b>Age</b>                           |           |       |
| Average age (tourist > 15 years old) | 41.5      | 46.7  |
| Standard deviation                   | 15.0      | 15.3  |
| <b>Age range (&gt; 15 years old)</b> |           |       |
| 16 - 24 years old                    | 12.6%     | 7.7%  |
| 25 - 30 years old                    | 17.0%     | 10.8% |
| 31 - 45 years old                    | 32.6%     | 28.6% |
| 46 - 60 years old                    | 24.8%     | 31.3% |
| Over 60 years old                    | 13.0%     | 21.5% |
| <b>Occupation</b>                    |           |       |
| Salaried worker                      | 56.9%     | 55.5% |
| Self-employed                        | 11.8%     | 11.0% |
| Unemployed                           | 1.7%      | 1.1%  |
| Business owner                       | 10.7%     | 9.2%  |
| Student                              | 5.9%      | 4.2%  |
| Retired                              | 11.2%     | 17.3% |
| Unpaid domestic work                 | 1.0%      | 0.9%  |
| Others                               | 0.9%      | 0.8%  |
| <b>Annual household income level</b> |           |       |
| Less than €25,000                    | 23.8%     | 17.0% |
| €25,000 - €49,999                    | 38.0%     | 36.5% |
| €50,000 - €74,999                    | 21.4%     | 25.0% |
| More than €74,999                    | 16.8%     | 21.5% |
| <b>Education level</b>               |           |       |
| No studies                           | 4.0%      | 4.8%  |
| Primary education                    | 2.7%      | 2.8%  |
| Secondary education                  | 22.5%     | 23.1% |
| Higher education                     | 70.8%     | 69.3% |

2 IN 10 TOURISTS ARE BRITISH

42 YEARS OLD AVERAGE AGE

44% 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 exoticism is "very important" in their choice.

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