

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

HIKING TRAIL NETWORK

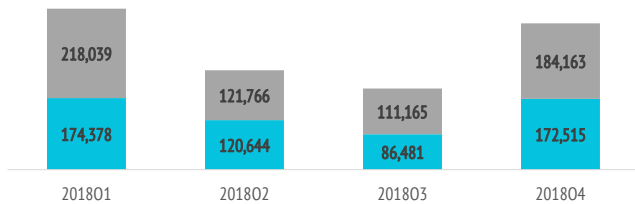
How many are they and how much do they spend?



| | Hiking trail network | Total |
|---|----------------------|-------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | n.d. | 15,559,787 |
| Tourist arrivals > 15 years old (EGT) | 1,189,150 | 13,485,651 |
| - book holiday package | 554,017 | 7,848,516 |
| - do not book holiday package | 635,133 | 5,637,135 |
| - % tourists who book holiday package | 46.6% | 58.2% |
| Share of total tourist | 9.0% | 100% |

TOURISTS MOTIVATED BY HIKING TRAIL NETWORK

■ do not book holiday package ■ book holiday package



| | Hiking trail network | Total |
|--|----------------------|---------------|
| Expenditure per tourist (€) | | |
| - book holiday package | 1,187 | 1,196 |
| - holiday package | 1,368 | 1,309 |
| - others | 1,102 | 1,064 |
| - do not book holiday package | 266 | 246 |
| - flight | 1,030 | 1,037 |
| - accommodation | 290 | 288 |
| - others | 320 | 350 |
| - others | 419 | 399 |
| Average length of stay | | |
| - book holiday package | 11.14 | 9.32 |
| - do not book holiday package | 9.70 | 8.66 |
| - do not book holiday package | 12.39 | 10.23 |
| Average daily expenditure (€) | | |
| - book holiday package | 126.9 | 143.6 |
| - do not book holiday package | 153.7 | 159.8 |
| - do not book holiday package | 103.4 | 121.0 |
| Total turnover (> 15 years old) (€m) | | |
| - book holiday package | 1,412 | 16,124 |
| - do not book holiday package | 758 | 10,277 |
| - do not book holiday package | 654 | 5,848 |

AVERAGE LENGTH OF STAY (nights)

■ Hiking trail network ■ Total



EXPENDITURE PER TOURIST (€)

■ Hiking trail network ■ Total



Importance of each factor in the destination choice



| | Hiking trail network | Total |
|----------------------|----------------------|-------|
| Hiking trail network | 100% | 9.0% |
| Climate | 80.9% | 78.1% |
| Landscapes | 76.1% | 31.6% |
| Environment | 63.9% | 30.6% |
| Tranquility | 58.1% | 46.2% |
| Sea | 56.2% | 43.3% |
| Safety | 54.7% | 51.4% |
| European belonging | 45.6% | 35.8% |
| Accommodation supply | 45.1% | 41.7% |
| Beaches | 44.2% | 37.1% |
| Effortless trip | 40.0% | 34.8% |
| Authenticity | 37.2% | 19.1% |
| Price | 36.9% | 36.5% |
| Gastronomy | 32.0% | 22.6% |
| Fun possibilities | 25.9% | 20.7% |
| Historical heritage | 24.4% | 7.1% |
| Culture | 21.8% | 7.3% |
| Exoticism | 21.4% | 10.5% |
| Shopping | 16.1% | 9.6% |
| Nightlife | 12.6% | 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?



| | Hiking trail network | Total |
|-------------------------|----------------------|-------|
| Rest | 38.3% | 55.1% |
| Enjoy family time | 11.9% | 14.7% |
| Have fun | 5.7% | 7.8% |
| Explore the destination | 36.2% | 18.5% |
| Practice their hobbies | 3.7% | 1.8% |
| Other reasons | 4.2% | 2.1% |

EXPLORE THE DESTINATION



How far in advance do they book their trip?



| | Hiking trail network | Total |
|------------------------|----------------------|-------|
| The same day | 1.0% | 0.7% |
| Between 1 and 30 days | 25.5% | 23.2% |
| Between 1 and 2 months | 24.4% | 23.0% |
| Between 3 and 6 months | 30.0% | 32.4% |
| More than 6 months | 19.1% | 20.7% |

% TOURISTS BOOKING BETWEEN 1 AND 30 DAYS IN ADVANCE

HIKING TRAIL NETWORK
25.5%



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 hiking trail network 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)

HIKING TRAIL NETWORK



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

| | Hiking trail network | Total |
|---------------------------------------|----------------------|-------|
| Previous visits to the Canary Islands | 48.1% | 50.9% |
| Friends or relatives | 28.5% | 27.8% |
| Internet or social media | 52.9% | 56.1% |
| Mass Media | 2.1% | 1.7% |
| Travel guides and magazines | 15.2% | 9.5% |
| Travel Blogs or Forums | 7.4% | 5.4% |
| Travel TV Channels | 1.0% | 0.7% |
| Tour Operator or Travel Agency | 18.5% | 24.7% |
| Public administrations or similar | 0.8% | 0.4% |
| Others | 2.4% | 2.3% |

* Multi-choice question

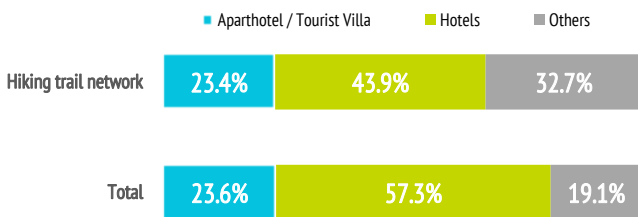
With whom did they book their flight and accommodation?

| | Hiking trail network | Total |
|-----------------------------------|----------------------|-------|
| Flight | | |
| - Directly with the airline | 49.0% | 39.5% |
| - Tour Operator or Travel Agency | 51.0% | 60.5% |
| Accommodation | | |
| - Directly with the accommodation | 37.6% | 28.8% |
| - Tour Operator or Travel Agency | 62.4% | 71.2% |

Where do they stay?

| | Hiking trail network | Total |
|---|----------------------|-------|
| 1-2-3* Hotel | 11.8% | 12.8% |
| 4* Hotel | 27.9% | 37.7% |
| 5* Hotel / 5* Luxury Hotel | 4.2% | 6.8% |
| Aparthotel / Tourist Villa | 23.4% | 23.6% |
| House/room rented in a private dwelling | 10.2% | 5.3% |
| Private accommodation (1) | 11.7% | 7.0% |
| Others (Cottage, cruise, camping,...) | 10.7% | 6.8% |

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



What do they book?

| | Hiking trail network | Total |
|-------------------|----------------------|-------|
| Room only | 38.5% | 28.8% |
| Bed and Breakfast | 13.9% | 11.7% |
| Half board | 22.7% | 22.4% |
| Full board | 3.9% | 3.0% |
| All inclusive | 21.0% | 34.1% |

”
38.5% of tourists book room only.
 (Canary Islands: 28.8%)

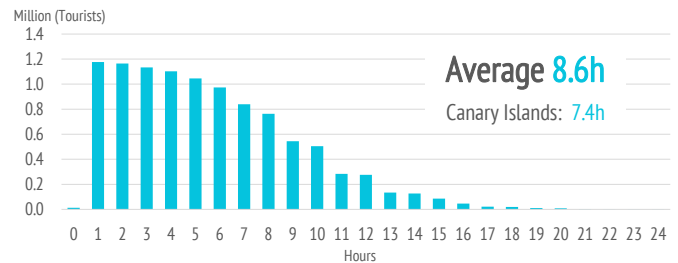
Other expenses

| | Hiking trail network | Total |
|-----------------------------------|----------------------|-------|
| Restaurants or cafes | 67.7% | 63.2% |
| Supermarkets | 61.4% | 55.9% |
| Car rental | 38.1% | 26.6% |
| Organized excursions | 23.8% | 21.8% |
| Taxi, transfer, chauffeur service | 38.4% | 51.7% |
| Theme Parks | 6.8% | 8.8% |
| Sport activities | 6.0% | 6.4% |
| Museums | 8.3% | 5.0% |
| Flights between islands | 7.7% | 4.8% |

Activities in the Canary Islands

| Outdoor time per day | Hiking trail network | Total |
|----------------------|----------------------|-------|
| 0 hours | 1.1% | 2.2% |
| 1 - 2 hours | 3.6% | 10.0% |
| 3 - 6 hours | 24.7% | 32.6% |
| 7 - 12 hours | 59.3% | 46.5% |
| More than 12 hours | 11.3% | 8.7% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | Hiking trail network | Total |
|--|----------------------|-------|
| Walk, wander | 79.4% | 71.0% |
| Beach | 66.4% | 68.0% |
| Explore the island on their own | 61.6% | 46.5% |
| Swimming pool, hotel facilities | 41.1% | 58.9% |
| Taste Canarian gastronomy | 31.3% | 25.4% |
| Nature activities | 24.9% | 10.0% |
| Sport activities | 18.0% | 14.3% |
| Organized excursions | 17.5% | 17.9% |
| Wineries / markets / popular festivals | 15.4% | 12.0% |
| Museums / exhibitions | 15.0% | 9.8% |
| Theme parks | 12.4% | 15.5% |
| Activities at sea | 11.5% | 9.8% |
| Sea excursions / whale watching | 11.4% | 11.3% |
| Nightlife / concerts / shows | 11.1% | 15.5% |
| Astronomical observation | 6.5% | 3.4% |
| Beauty and health treatments | 5.5% | 5.7% |

* Multi-choice question



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

HIKING TRAIL NETWORK



Which island do they choose?

| Tourist > 15 years old | Canarias | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|--|------------|-----------|---------------|--------------|-----------|----------|
| Tourists motivated by hiking trail network | 1,189,150 | 144,052 | 108,244 | 300,883 | 513,032 | 98,392 |
| - Share by islands | 100% | 12.1% | 9.1% | 25.3% | 43.1% | 8.3% |
| 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 hiking trail network | 9.0% | 5.9% | 5.9% | 8.1% | 10.5% | 40.2% |

How many islands do they visit during their trip?

| | Hiking trail network | Total |
|-----------------------|----------------------|-------|
| One island | 85.5% | 90.9% |
| Two islands | 12.0% | 7.7% |
| Three or more islands | 2.5% | 1.4% |

Internet usage during their trip

| | Hiking trail network | Total |
|-------------------------|----------------------|-------|
| Research | | |
| - Tourist package | 13.1% | 15.4% |
| - Flights | 11.3% | 13.0% |
| - Accommodation | 13.3% | 17.7% |
| - Transport | 14.4% | 15.6% |
| - Restaurants | 27.9% | 27.0% |
| - Excursions | 27.8% | 26.3% |
| - Activities | 33.2% | 31.0% |
| Book or purchase | | |
| - Tourist package | 34.8% | 38.1% |
| - Flights | 69.3% | 64.4% |
| - Accommodation | 57.9% | 54.5% |
| - Transport | 52.7% | 44.7% |
| - Restaurants | 13.8% | 10.5% |
| - Excursions | 16.8% | 11.4% |
| - Activities | 17.6% | 12.5% |

* Multi-choice question

| Internet usage in the Canary Islands | Hiking trail network | Total |
|--------------------------------------|----------------------|--------------|
| Did not use the Internet | 11.0% | 9.8% |
| Used the Internet | 89.0% | 90.2% |
| - Own Internet connection | 38.1% | 36.5% |
| - Free Wifi connection | 35.9% | 41.1% |
| Applications* | | |
| - Search for locations or maps | 70.2% | 60.7% |
| - Search for destination info | 45.9% | 44.7% |
| - Share pictures or trip videos | 53.7% | 55.6% |
| - Download tourist apps | 8.6% | 6.5% |
| - Others | 20.3% | 23.9% |

* Multi-choice question



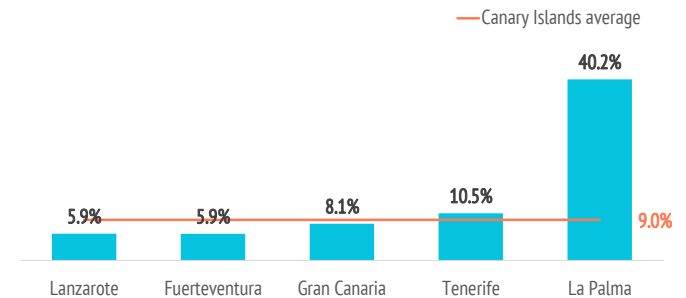
70.2% of tourists search for locations or maps during their stay in the Canary Islands

(Canary Islands: 60.7%)



Picture: Freepik.com

% TOURISTS BY ISLANDS

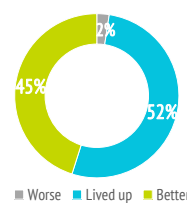


How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Hiking trail network | Total |
|---------------------------|----------------------|-------|
| Average rating | 8.76 | 8.58 |

| Experience in the Canary Islands | Hiking trail network | Total |
|-------------------------------------|----------------------|-------|
| Worse or much worse than expected | 2.4% | 2.9% |
| Lived up to expectations | 52.5% | 57.4% |
| Better or much better than expected | 45.1% | 39.7% |

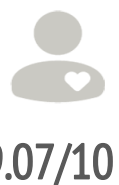
| Future intentions (scale 1-10) | Hiking trail network | Total |
|---------------------------------------|----------------------|-------|
| Return to the Canary Islands | 8.77 | 8.60 |
| Recommend visiting the Canary Islands | 9.07 | 8.86 |



Experience in the Canary



Return to the Canary Islands



Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

| | Hiking trail network | Total |
|---|----------------------|--------------|
| Repeat tourists | 68.7% | 71.0% |
| Repeat tourists (last 5 years) | 64.0% | 64.6% |
| Repeat tourists (last 5 years) (5 or more visits) | 20.6% | 18.4% |
| At least 10 previous visits | 19.8% | 17.8% |

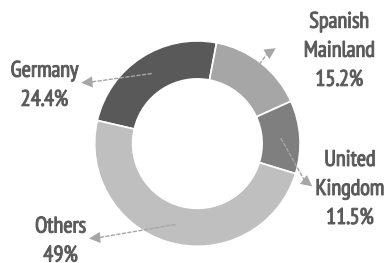
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HIKING TRAIL NETWORK

Where are they from?



| | % | Absolute |
|------------------|-------|----------|
| Germany | 24.4% | 289,977 |
| Spanish Mainland | 15.2% | 181,186 |
| United Kingdom | 11.5% | 136,705 |
| Italy | 7.4% | 87,986 |
| France | 6.5% | 76,790 |
| Norway | 5.2% | 61,798 |
| Belgium | 4.5% | 53,208 |
| Finland | 3.7% | 44,115 |
| Netherlands | 3.6% | 42,652 |
| Sweden | 3.0% | 35,324 |
| Switzerland | 2.6% | 31,012 |
| Poland | 1.9% | 22,837 |
| Ireland | 1.9% | 22,577 |
| Denmark | 1.4% | 17,007 |
| Austria | 1.4% | 16,840 |
| Russia | 1.0% | 11,844 |
| Czech Republic | 0.4% | 5,342 |
| Others | 4.4% | 51,951 |



Who do they come with?



| | Hiking trail network | Total |
|--|----------------------|--------------|
| Unaccompanied | 12.9% | 8.9% |
| Only with partner | 52.0% | 47.4% |
| Only with children (< 13 years old) | 5.5% | 5.9% |
| Partner + children (< 13 years old) | 4.0% | 7.2% |
| Other relatives | 6.1% | 9.0% |
| Friends | 6.3% | 6.3% |
| Work colleagues | 0.3% | 0.5% |
| Organized trip | 0.4% | 0.2% |
| Other combinations ⁽¹⁾ | 12.5% | 14.6% |
| <i>(1) Different situations have been isolated</i> | | |
| Tourists with children | 13.1% | 19.3% |
| - Between 0 and 2 years old | 1.4% | 1.8% |
| - Between 3 and 12 years old | 10.5% | 15.8% |
| - Between 0 -2 and 3-12 years | 1.2% | 1.6% |
| Tourists without children | 86.9% | 80.7% |
| Group composition: | | |
| - 1 person | 17.9% | 12.4% |
| - 2 people | 57.4% | 54.1% |
| - 3 people | 10.1% | 12.6% |
| - 4 or 5 people | 12.2% | 17.1% |
| - 6 or more people | 2.3% | 3.8% |
| Average group size: | 2.33 | 2.58 |

Who are they?



| | Hiking trail network | Total |
|--------------------------------------|----------------------|-------|
| Gender | | |
| Men | 48.7% | 48.2% |
| Women | 51.3% | 51.8% |
| Age | | |
| Average age (tourist > 15 years old) | 48.3 | 46.7 |
| Standard deviation | 15.5 | 15.3 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 5.9% | 7.7% |
| 25 - 30 years old | 11.0% | 10.8% |
| 31 - 45 years old | 26.5% | 28.6% |
| 46 - 60 years old | 31.0% | 31.3% |
| Over 60 years old | 25.6% | 21.5% |
| Occupation | | |
| Salaried worker | 50.7% | 55.5% |
| Self-employed | 11.9% | 11.0% |
| Unemployed | 1.6% | 1.1% |
| Business owner | 9.5% | 9.2% |
| Student | 4.3% | 4.2% |
| Retired | 20.2% | 17.3% |
| Unpaid domestic work | 0.9% | 0.9% |
| Others | 1.0% | 0.8% |
| Annual household income level | | |
| Less than €25,000 | 18.8% | 17.0% |
| €25,000 - €49,999 | 36.6% | 36.5% |
| €50,000 - €74,999 | 25.0% | 25.0% |
| More than €74,999 | 19.6% | 21.5% |
| Education level | | |
| No studies | 2.2% | 4.8% |
| Primary education | 3.3% | 2.8% |
| Secondary education | 21.7% | 23.1% |
| Higher education | 72.8% | 69.3% |



Pictures: Freepik.com

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