

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

EFFORTLESS TRIP



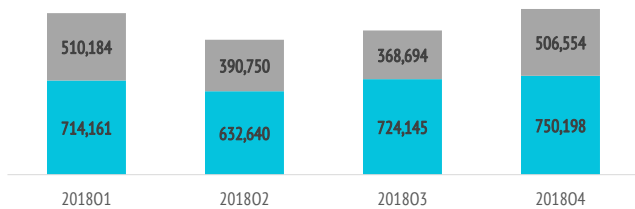
How many are they and how much do they spend?



| | Effortless trip | Total |
|---|------------------|-------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | n.d. | 15,559,787 |
| Tourist arrivals > 15 years old (EGT) | 4,597,327 | 13,485,651 |
| - book holiday package | 2,821,145 | 7,848,516 |
| - do not book holiday package | 1,776,182 | 5,637,135 |
| - % tourists who book holiday package | 61.4% | 58.2% |
| Share of total tourist | 34.8% | 100% |

TOURISTS MOTIVATED BY EFFORTLESS TRIP

■ do not book holiday package ■ book holiday package



| | Effortless trip | Total |
|--|-----------------|--------|
| Expenditure per tourist (€) | | |
| - book holiday package | 1,327 | 1,309 |
| - holiday package | 1,090 | 1,064 |
| - others | 237 | 246 |
| - do not book holiday package | 1,123 | 1,037 |
| - flight | 305 | 288 |
| - accommodation | 394 | 350 |
| - others | 424 | 399 |
| Average length of stay | | |
| - book holiday package | 8.76 | 8.66 |
| - do not book holiday package | 10.58 | 10.23 |
| Average daily expenditure (€) | | |
| - book holiday package | 159.6 | 159.8 |
| - do not book holiday package | 125.7 | 121.0 |
| Total turnover (> 15 years old) (€m) | | |
| - book holiday package | 3,744 | 10,277 |
| - do not book holiday package | 1,996 | 5,848 |

AVERAGE LENGTH OF STAY (nights)

■ Effortless trip ■ Total



EXPENDITURE PER TOURIST (€)

■ Effortless trip ■ Total



Importance of each factor in the destination choice



| | Effortless trip | Total |
|----------------------|-----------------|-------|
| Effortless trip | 100% | 34.8% |
| Climate | 87.2% | 78.1% |
| Safety | 83.0% | 51.4% |
| Tranquility | 70.4% | 46.2% |
| Accommodation supply | 61.2% | 41.7% |
| Price | 55.5% | 36.5% |
| European belonging | 54.1% | 35.8% |
| Sea | 52.1% | 43.3% |
| Beaches | 45.7% | 37.1% |
| Environment | 40.8% | 30.6% |
| Gastronomy | 39.4% | 22.6% |
| Landscapes | 36.3% | 31.6% |
| Authenticity | 29.9% | 19.1% |
| Fun possibilities | 29.4% | 20.7% |
| Shopping | 16.5% | 9.6% |
| Exoticism | 15.1% | 10.5% |
| Nightlife | 11.5% | 7.5% |
| Culture | 11.5% | 7.3% |
| Historical heritage | 10.6% | 7.1% |
| Hiking trail network | 10.3% | 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?



| | Effortless trip | Total |
|-------------------------|-----------------|-------|
| Rest | 60.2% | 55.1% |
| Enjoy family time | 13.8% | 14.7% |
| Have fun | 7.0% | 7.8% |
| Explore the destination | 15.6% | 18.5% |
| Practice their hobbies | 1.5% | 1.8% |
| Other reasons | 1.9% | 2.1% |



How far in advance do they book their trip?



| | Effortless trip | Total |
|------------------------|-----------------|-------|
| The same day | 0.6% | 0.7% |
| Between 1 and 30 days | 21.4% | 23.2% |
| Between 1 and 2 months | 22.3% | 23.0% |
| Between 3 and 6 months | 32.5% | 32.4% |
| More than 6 months | 23.2% | 20.7% |

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

EFFORTLESS TRIP
23.2%



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 effortless trip 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.

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EFFORTLESS TRIP



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

| | Effortless trip | Total |
|---------------------------------------|-----------------|-------|
| Previous visits to the Canary Islands | 55.4% | 50.9% |
| Friends or relatives | 26.9% | 27.8% |
| Internet or social media | 56.3% | 56.1% |
| Mass Media | 1.7% | 1.7% |
| Travel guides and magazines | 9.1% | 9.5% |
| Travel Blogs or Forums | 5.2% | 5.4% |
| Travel TV Channels | 0.9% | 0.7% |
| Tour Operator or Travel Agency | 27.2% | 24.7% |
| Public administrations or similar | 0.3% | 0.4% |
| Others | 1.9% | 2.3% |

* Multi-choice question

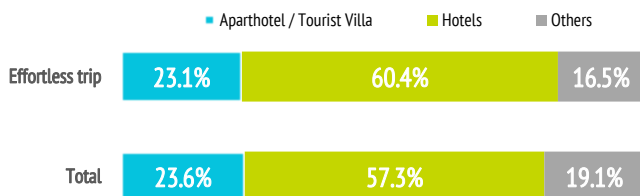
With whom did they book their flight and accommodation?

| | Effortless trip | Total |
|-----------------------------------|-----------------|-------|
| Flight | | |
| - Directly with the airline | 37.8% | 39.5% |
| - Tour Operator or Travel Agency | 62.2% | 60.5% |
| Accommodation | | |
| - Directly with the accommodation | 27.4% | 28.8% |
| - Tour Operator or Travel Agency | 72.6% | 71.2% |

Where do they stay?

| | Effortless trip | Total |
|---|-----------------|-------|
| 1-2-3* Hotel | 12.2% | 12.8% |
| 4* Hotel | 40.2% | 37.7% |
| 5* Hotel / 5* Luxury Hotel | 8.1% | 6.8% |
| Aparthotel / Tourist Villa | 23.1% | 23.6% |
| House/room rented in a private dwelling | 4.5% | 5.3% |
| Private accommodation (1) | 6.1% | 7.0% |
| Others (Cottage, cruise, camping,...) | 5.9% | 6.8% |

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



What do they book?

| | Effortless trip | Total |
|-------------------|-----------------|-------|
| Room only | 26.1% | 28.8% |
| Bed and Breakfast | 10.8% | 11.7% |
| Half board | 23.6% | 22.4% |
| Full board | 2.6% | 3.0% |
| All inclusive | 36.8% | 34.1% |

”
36.8% of tourists book all inclusive.
 (Canary Islands: 34.1%)

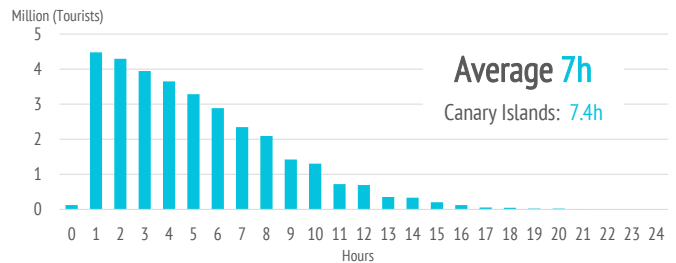
Other expenses

| | Effortless trip | Total |
|-----------------------------------|-----------------|-------|
| Restaurants or cafes | 61.6% | 63.2% |
| Supermarkets | 55.1% | 55.9% |
| Car rental | 22.8% | 26.6% |
| Organized excursions | 21.1% | 21.8% |
| Taxi, transfer, chauffeur service | 55.7% | 51.7% |
| Theme Parks | 8.6% | 8.8% |
| Sport activities | 6.3% | 6.4% |
| Museums | 4.1% | 5.0% |
| Flights between islands | 4.4% | 4.8% |

Activities in the Canary Islands

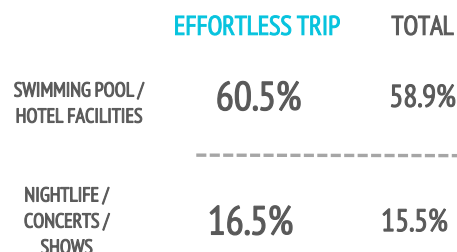
| Outdoor time per day | Effortless trip | Total |
|----------------------|-----------------|-------|
| 0 hours | 2.6% | 2.2% |
| 1 - 2 hours | 11.5% | 10.0% |
| 3 - 6 hours | 34.8% | 32.6% |
| 7 - 12 hours | 43.4% | 46.5% |
| More than 12 hours | 7.7% | 8.7% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | Effortless trip | Total |
|--|-----------------|-------|
| Walk, wander | 70.0% | 71.0% |
| Beach | 68.7% | 68.0% |
| Swimming pool, hotel facilities | 60.5% | 58.9% |
| Explore the island on their own | 43.0% | 46.5% |
| Taste Canarian gastronomy | 26.0% | 25.4% |
| Organized excursions | 17.5% | 17.9% |
| Nightlife / concerts / shows | 16.5% | 15.5% |
| Theme parks | 15.2% | 15.5% |
| Sport activities | 14.1% | 14.3% |
| Wineries / markets / popular festivals | 12.0% | 12.0% |
| Sea excursions / whale watching | 10.9% | 11.3% |
| Activities at sea | 10.1% | 9.8% |
| Nature activities | 8.8% | 10.0% |
| Museums / exhibitions | 8.6% | 9.8% |
| Beauty and health treatments | 6.6% | 5.7% |
| Astronomical observation | 3.5% | 3.4% |

* Multi-choice question



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Which island do they choose?

| Tourist > 15 years old | Canarias | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|---|------------|-----------|---------------|--------------|-----------|----------|
| Tourists motivated by effortless trip | 4,597,327 | 878,531 | 726,561 | 1,229,027 | 1,668,669 | 65,427 |
| - Share by islands | 100% | 19.1% | 15.8% | 26.7% | 36.3% | 1.4% |
| 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 effortless trip | 34.8% | 36.1% | 39.6% | 33.3% | 34.0% | 26.7% |

How many islands do they visit during their trip?

| | Effortless trip | Total |
|-----------------------|-----------------|-------|
| One island | 92.0% | 90.9% |
| Two islands | 6.7% | 7.7% |
| Three or more islands | 1.3% | 1.4% |

Internet usage during their trip

| | Effortless trip | Total |
|-------------------------|-----------------|-------|
| Research | | |
| - Tourist package | 16.2% | 15.4% |
| - Flights | 14.1% | 13.0% |
| - Accommodation | 19.0% | 17.7% |
| - Transport | 15.3% | 15.6% |
| - Restaurants | 26.6% | 27.0% |
| - Excursions | 26.2% | 26.3% |
| - Activities | 30.6% | 31.0% |
| Book or purchase | | |
| - Tourist package | 41.3% | 38.1% |
| - Flights | 62.8% | 64.4% |
| - Accommodation | 53.7% | 54.5% |
| - Transport | 43.8% | 44.7% |
| - Restaurants | 11.3% | 10.5% |
| - Excursions | 11.9% | 11.4% |
| - Activities | 12.6% | 12.5% |

* Multi-choice question

| Internet usage in the Canary Islands | Effortless trip | Total |
|--------------------------------------|-----------------|--------------|
| Did not use the Internet | 10.0% | 9.8% |
| Used the Internet | 90.0% | 90.2% |
| - Own Internet connection | 33.4% | 36.5% |
| - Free Wifi connection | 43.7% | 41.1% |
| Applications* | | |
| - Search for locations or maps | 58.0% | 60.7% |
| - Search for destination info | 44.8% | 44.7% |
| - Share pictures or trip videos | 57.6% | 55.6% |
| - Download tourist apps | 6.9% | 6.5% |
| - Others | 24.2% | 23.9% |

* Multi-choice question

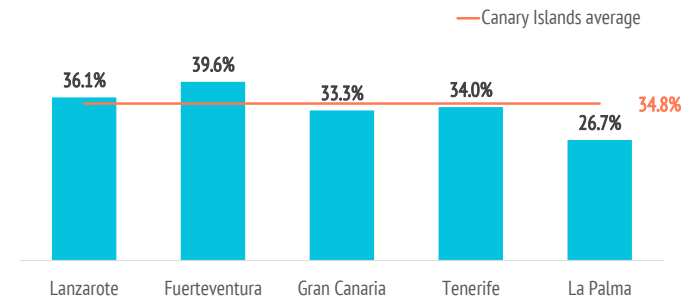


57.6% of tourists share pictures or trip videos during their stay in the Canary Islands

(Canary Islands: 55.6%)



% TOURISTS BY ISLANDS

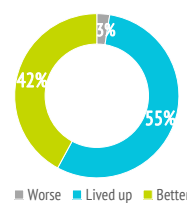


How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Effortless trip | Total |
|---------------------------|-----------------|-------|
| Average rating | 8.79 | 8.58 |

| Experience in the Canary Islands | Effortless trip | Total |
|-------------------------------------|-----------------|-------|
| Worse or much worse than expected | 2.5% | 2.9% |
| Lived up to expectations | 55.4% | 57.4% |
| Better or much better than expected | 42.1% | 39.7% |

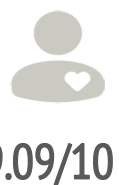
| Future intentions (scale 1-10) | Effortless trip | Total |
|---------------------------------------|-----------------|-------|
| Return to the Canary Islands | 8.87 | 8.60 |
| Recommend visiting the Canary Islands | 9.09 | 8.86 |



Experience in the Canary



Return to the Canary Islands



Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

| | Effortless trip | Total |
|---|-----------------|--------------|
| Repeat tourists | 74.5% | 71.0% |
| Repeat tourists (last 5 years) | 68.0% | 64.6% |
| Repeat tourists (last 5 years) (5 or more visits) | 21.1% | 18.4% |
| At least 10 previous visits | 20.1% | 17.8% |

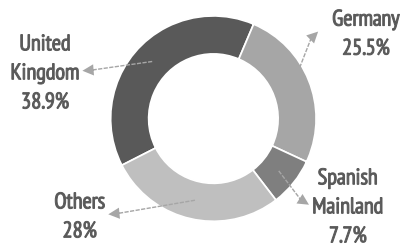
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EFFORTLESS TRIP

Where are they from?



| | % | Absolute |
|------------------|-------|-----------|
| United Kingdom | 38.9% | 1,788,859 |
| Germany | 25.5% | 1,172,030 |
| Spanish Mainland | 7.7% | 352,645 |
| Ireland | 4.9% | 224,281 |
| Sweden | 3.3% | 149,797 |
| Italy | 3.0% | 138,224 |
| Norway | 2.6% | 121,102 |
| France | 2.4% | 110,370 |
| Switzerland | 2.2% | 102,095 |
| Poland | 1.8% | 81,806 |
| Belgium | 1.4% | 63,828 |
| Netherlands | 1.3% | 58,945 |
| Austria | 1.1% | 52,188 |
| Finland | 0.5% | 24,918 |
| Russia | 0.5% | 23,395 |
| Denmark | 0.4% | 16,300 |
| Czech Republic | 0.3% | 14,741 |
| Others | 2.2% | 101,801 |



Who do they come with?



| | Effortless trip | Total |
|--|-----------------|--------------|
| Unaccompanied | 7.5% | 8.9% |
| Only with partner | 50.5% | 47.4% |
| Only with children (< 13 years old) | 6.0% | 5.9% |
| Partner + children (< 13 years old) | 6.9% | 7.2% |
| Other relatives | 8.9% | 9.0% |
| Friends | 5.9% | 6.3% |
| Work colleagues | 0.1% | 0.5% |
| Organized trip | 0.2% | 0.2% |
| Other combinations ⁽¹⁾ | 14.0% | 14.6% |
| <i>(1) Different situations have been isolated</i> | | |
| Tourists with children | 19.0% | 19.3% |
| - Between 0 and 2 years old | 1.8% | 1.8% |
| - Between 3 and 12 years old | 15.5% | 15.8% |
| - Between 0 -2 and 3-12 years | 1.7% | 1.6% |
| Tourists without children | 81.0% | 80.7% |
| Group composition: | | |
| - 1 person | 10.7% | 12.4% |
| - 2 people | 57.3% | 54.1% |
| - 3 people | 12.3% | 12.6% |
| - 4 or 5 people | 16.2% | 17.1% |
| - 6 or more people | 3.5% | 3.8% |
| Average group size: | 2.56 | 2.58 |

Who are they?



| | Effortless trip | Total |
|--------------------------------------|-----------------|-------|
| Gender | | |
| Men | 43.4% | 48.2% |
| Women | 56.6% | 51.8% |
| Age | | |
| Average age (tourist > 15 years old) | 47.5 | 46.7 |
| Standard deviation | 15.4 | 15.3 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 7.2% | 7.7% |
| 25 - 30 years old | 10.4% | 10.8% |
| 31 - 45 years old | 27.3% | 28.6% |
| 46 - 60 years old | 32.4% | 31.3% |
| Over 60 years old | 22.8% | 21.5% |
| Occupation | | |
| Salaried worker | 56.0% | 55.5% |
| Self-employed | 10.2% | 11.0% |
| Unemployed | 0.9% | 1.1% |
| Business owner | 8.9% | 9.2% |
| Student | 3.8% | 4.2% |
| Retired | 18.4% | 17.3% |
| Unpaid domestic work | 1.0% | 0.9% |
| Others | 0.7% | 0.8% |
| Annual household income level | | |
| Less than €25,000 | 16.3% | 17.0% |
| €25,000 - €49,999 | 36.0% | 36.5% |
| €50,000 - €74,999 | 25.4% | 25.0% |
| More than €74,999 | 22.3% | 21.5% |
| Education level | | |
| No studies | 5.5% | 4.8% |
| Primary education | 2.8% | 2.8% |
| Secondary education | 22.8% | 23.1% |
| Higher education | 68.8% | 69.3% |



Pictures: Freepik.com

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