

How many are they and how much do they spend?

| | Effortless trip | Total |
|---|------------------|------------------|
| TOURISTS | | |
| Tourist arrivals (FRONTUR) | n.d. | 6,697,165 |
| Tourist arrivals > 15 years old (EGT) | 1,958,629 | 5,827,892 |
| - book holiday package | 961,886 | 2,549,012 |
| - do not book holiday package | 996,743 | 3,278,880 |
| - % tourists who book holiday package | 49.1% | 43.7% |
| Share of total tourist | 34.9% | 100% |
| Expenditure per tourist (€) | | |
| Effortless trip | 1,259 | 1,206 |
| - book holiday package | 1,418 | 1,415 |
| - holiday package | 1,154 | 1,135 |
| - others | 264 | 280 |
| - do not book holiday package | 1,106 | 1,044 |
| - flight | 259 | 248 |
| - accommodation | 393 | 369 |
| - others | 454 | 427 |
| Average length of stay | 9.74 | 9.54 |
| - book holiday package | 8.70 | 8.59 |
| - do not book holiday package | 10.74 | 10.28 |
| Average daily expenditure (€) | | |
| Effortless trip | 146.7 | 144.0 |
| - book holiday package | 170.6 | 172.8 |
| - do not book holiday package | 123.8 | 121.6 |
| Total turnover (> 15 years old) (€m) | | |
| Effortless trip | 2,466 | 7,028 |
| - book holiday package | 1,364 | 3,606 |
| - do not book holiday package | 1,102 | 3,422 |

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Where did they spend their main holiday last year?*

| | Effortless trip | Total |
|----------------------|-----------------|-------|
| Didn't have holidays | 37.4% | 35.7% |
| Canary Islands | 19.8% | 17.6% |
| Other destination | 42.8% | 46.8% |

What other destinations do they consider for this trip?*

| | Effortless trip | Total |
|-------------------------------|-----------------|-------|
| None | 29.2% | 29.4% |
| Canary Islands (other island) | 26.1% | 25.4% |
| Other destination | 44.7% | 45.1% |

*Percentage of valid answers

Source: Encuesta sobre el Gasto Turístico (ISTAC). 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.

Importance of each factor in the destination choice

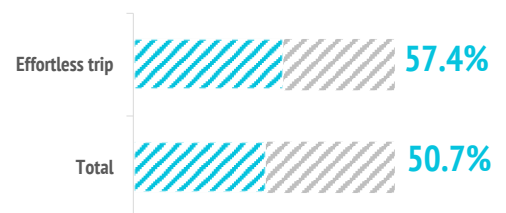
| | Effortless trip | Total |
|------------------------|-----------------|--------------|
| Effortless trip | 100.0% | 34.9% |
| Climate | 85.3% | 76.0% |
| Safety | 80.7% | 49.0% |
| Tranquility | 72.4% | 48.5% |
| Sea | 62.4% | 52.0% |
| Accommodation supply | 55.8% | 37.8% |
| European belonging | 55.6% | 40.2% |
| Beaches | 54.6% | 44.6% |
| Price | 50.2% | 32.4% |
| Gastronomy | 46.4% | 27.9% |
| Environment | 44.2% | 34.7% |
| Landscapes | 43.9% | 39.1% |
| Authenticity | 36.3% | 24.4% |
| Fun possibilities | 31.3% | 22.4% |
| Exoticism | 19.6% | 14.5% |
| Shopping | 15.7% | 8.8% |
| Hiking trail network | 14.4% | 12.1% |
| Culture | 14.3% | 8.7% |
| Historical heritage | 13.9% | 9.1% |
| Nightlife | 13.4% | 8.4% |

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 | 57.4% | 50.7% |
| Enjoy family time | 13.2% | 14.0% |
| Have fun | 7.3% | 7.3% |
| Explore the destination | 17.7% | 23.3% |
| Practice their hobbies | 2.4% | 2.6% |
| Other reasons | 2.0% | 2.1% |



How far in advance do they book their trip?

| | Effortless trip | Total |
|------------------------|-----------------|-------|
| The same day | 0.9% | 1.0% |
| Between 1 and 30 days | 41.5% | 42.5% |
| Between 1 and 2 months | 24.8% | 26.7% |
| Between 3 and 6 months | 19.3% | 18.7% |
| More than 6 months | 13.6% | 11.1% |

% TOURISTS BOOKING WITH MORE 6 MONTHS IN ADVANCE

EFFORTLESS TRIP
13.6%



TOTAL
11.1%

Picture: Freepik.com

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

| | Effortless trip | Total |
|---------------------------------------|-----------------|-------|
| Previous visits to the Canary Islands | 50.8% | 45.7% |
| Friends or relatives | 29.6% | 30.9% |
| Internet or social media | 52.9% | 53.5% |
| Mass Media | 2.4% | 2.3% |
| Travel guides and magazines | 6.5% | 7.0% |
| Travel Blogs or Forums | 7.3% | 8.4% |
| Travel TV Channels | 0.6% | 0.5% |
| Tour Operator or Travel Agency | 21.6% | 19.4% |
| Public administrations or similar | 2.2% | 1.9% |
| Others | 2.0% | 2.9% |

* Multi-choise question

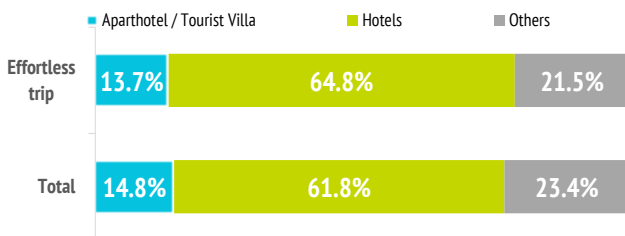
With whom did they book their flight and accommodation?

| | Effortless trip | Total |
|-----------------------------------|-----------------|-------|
| Flight | | |
| - Directly with the airline | 50.9% | 52.8% |
| - Tour Operator or Travel Agency | 49.1% | 47.2% |
| Accommodation | | |
| - Directly with the accommodation | 38.0% | 39.9% |
| - Tour Operator or Travel Agency | 62.0% | 60.1% |

Where do they stay?

| | Effortless trip | Total |
|---|-----------------|-------|
| 1-2-3* Hotel | 10.9% | 11.5% |
| 4* Hotel | 41.5% | 39.4% |
| 5* Hotel / 5* Luxury Hotel | 12.3% | 10.9% |
| Aparthotel / Tourist Villa | 13.7% | 14.8% |
| House/room rented in a private dwelling | 6.1% | 6.9% |
| Private accommodation (1) | 9.9% | 9.9% |
| Others (Cottage, cruise, camping,...) | 5.4% | 6.6% |

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



What do they book?

| | Effortless trip | Total |
|-------------------|-----------------|-------|
| Room only | 24.7% | 28.1% |
| Bed and Breakfast | 14.0% | 15.3% |
| Half board | 20.5% | 19.5% |
| Full board | 3.1% | 3.2% |
| All inclusive | 37.8% | 33.8% |

”
37.8% of tourists book all inclusive.
(Canary Islands: 33.8%)

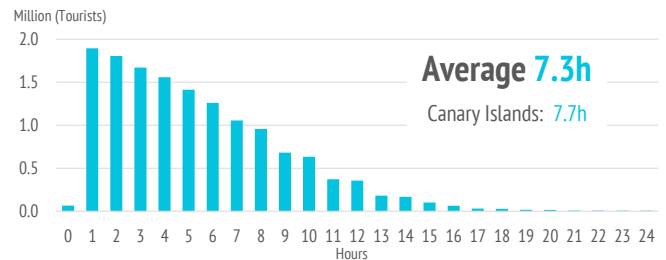
Other expenses

| | Effortless trip | Total |
|-----------------------------------|-----------------|-------|
| Restaurants or cafes | 63.6% | 66.9% |
| Supermarkets | 54.8% | 55.6% |
| Car rental | 32.5% | 37.3% |
| Organized excursions | 21.4% | 23.7% |
| Taxi, transfer, chauffeur service | 51.2% | 46.0% |
| Theme Parks | 8.2% | 8.6% |
| Sport activities | 8.9% | 9.3% |
| Museums | 3.9% | 4.7% |
| Flights between islands | 5.3% | 6.3% |

Activities in the Canary Islands

| Outdoor time per day | Effortless trip | Total |
|----------------------|-----------------|-------|
| 0 hours | 3.3% | 2.4% |
| 1 - 2 hours | 11.4% | 10.0% |
| 3 - 6 hours | 31.5% | 30.1% |
| 7 - 12 hours | 44.6% | 47.1% |
| More than 12 hours | 9.2% | 10.5% |

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands | Effortless trip | Total |
|--|-----------------|-------|
| Beach | 75.5% | 75.1% |
| Walk, wander | 71.1% | 72.2% |
| Swimming pool, hotel facilities | 59.3% | 57.5% |
| Explore the island on their own | 48.4% | 52.5% |
| Swim | 39.9% | 38.8% |
| Taste Canarian gastronomy | 30.2% | 30.2% |
| Hiking | 18.0% | 22.5% |
| Organized excursions | 14.9% | 16.0% |
| Nightlife / concerts / shows | 13.7% | 12.3% |
| Sea excursions / whale watching | 12.4% | 13.5% |
| Theme parks | 11.7% | 12.2% |
| Wineries / markets / popular festivals | 9.4% | 10.0% |
| Museums / exhibitions | 9.3% | 10.7% |
| Other Nature Activities | 8.4% | 9.5% |
| Beauty and health treatments | 6.6% | 5.6% |
| Running | 6.3% | 7.6% |
| Practice other sports | 5.6% | 5.9% |
| Surf | 4.3% | 4.8% |
| Cycling / Mountain bike | 4.1% | 4.2% |
| Scuba Diving | 4.0% | 4.2% |
| Astronomical observation | 3.7% | 4.2% |
| Golf | 2.5% | 2.3% |
| Windsurf / Kitesurf | 1.6% | 1.5% |

* Multi-choise question

PROFILE OF TOURIST BY ASPECTS INFLUENCING THE DESTINATION CHOICE (2021)

EFFORTLESS TRIP

Which island do they choose?

| Tourist > 15 years old | Canary Islands | Lanzarote | Fuerteventura | Gran Canaria | Tenerife | La Palma |
|--|----------------|-----------|---------------|--------------|-----------|----------|
| Tourists motivated by effortless trip | 1,958,629 | 331,692 | 333,419 | 509,692 | 742,051 | 23,114 |
| - Share by islands | 100% | 16.9% | 17.0% | 26.0% | 37.9% | 1.2% |
| Total tourists | 5,827,892 | 963,331 | 843,805 | 1,545,237 | 2,320,313 | 102,576 |
| - Share by islands | 100% | 16.5% | 14.5% | 26.5% | 39.8% | 1.8% |
| %Tourists motivated by effortless trip | 34.9% | 35.1% | 40.3% | 34.9% | 33.2% | 24.7% |

How many islands do they visit during their trip?

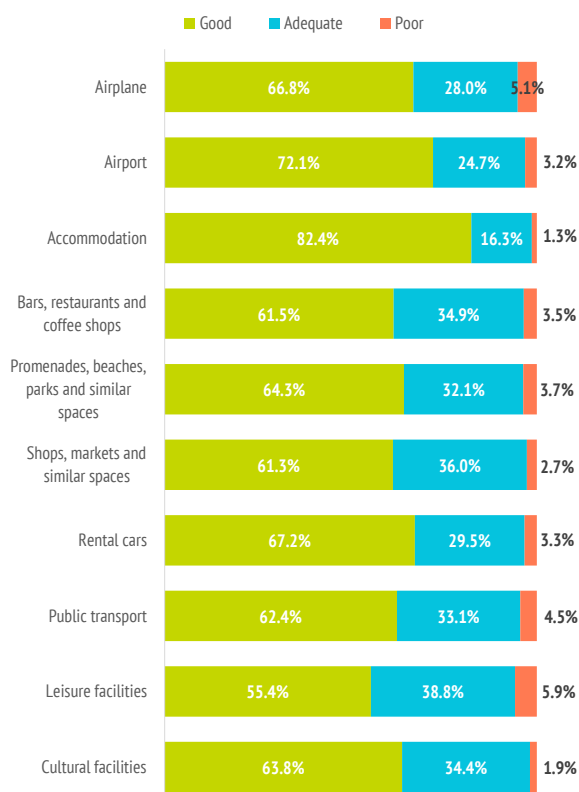
| | Effortless trip | Total |
|-----------------------|-----------------|-------|
| One island | 92.4% | 90.9% |
| Two islands | 6.3% | 7.8% |
| Three or more islands | 1.3% | 1.3% |

Health safety

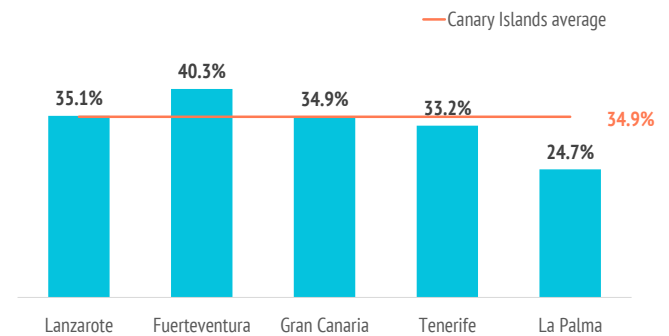
| Planning the trip: Importance | Effortless trip | Total |
|-------------------------------|-----------------|-------|
| Average rating (scale 0-10) | 8.45 | 7.99 |

| During the stay: Rate | Effortless trip | Total |
|-----------------------------|-----------------|-------|
| Average rating (scale 0-10) | 8.75 | 8.42 |

HEALTH SAFETY MEASURES (RATE)



% TOURISTS BY ISLAND OF STAY

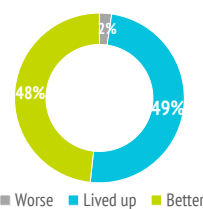


How do they rate the Canary Islands?

| Satisfaction (scale 0-10) | Effortless trip | Total |
|---------------------------|-----------------|-------|
| Average rating | 9.07 | 8.86 |

| Experience in the Canary Islands | Effortless trip | Total |
|-------------------------------------|-----------------|-------|
| Worse or much worse than expected | 2.3% | 2.7% |
| Lived up to expectations | 49.4% | 51.4% |
| Better or much better than expected | 48.3% | 45.9% |

| Future intentions (scale 1-10) | Effortless trip | Total |
|---------------------------------------|-----------------|-------|
| Return to the Canary Islands | 9.10 | 8.86 |
| Recommend visiting the Canary Islands | 9.31 | 9.10 |



Experience in the Canary Islands



x,xx/10

Return to the Canary Islands



x,xx/10

Recommend visiting the Canary Islands

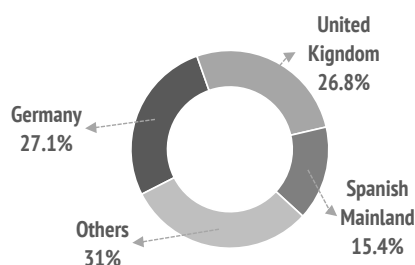
How many are loyal to the Canary Islands?

| | Effortless trip | Total |
|---|-----------------|--------------|
| Repeat tourists | 71.0% | 68.0% |
| Repeat tourists (last 5 years) | 64.8% | 61.9% |
| Repeat tourists (last 5 years) (5 or more visits) | 16.9% | 15.0% |
| At least 10 previous visits | 20.8% | 18.3% |

Where are they from?



| | % | Absolute |
|------------------|-------|----------|
| Germany | 27.1% | 530,650 |
| United Kingdom | 26.8% | 524,517 |
| Spanish Mainland | 15.4% | 302,328 |
| France | 5.0% | 97,794 |
| Italy | 4.1% | 79,515 |
| Ireland | 3.8% | 73,491 |
| Poland | 3.4% | 65,651 |
| Sweden | 2.1% | 40,441 |
| Netherlands | 2.0% | 39,825 |
| Belgium | 1.8% | 36,064 |
| Norway | 1.6% | 30,973 |
| Switzerland | 1.5% | 30,003 |
| Czech Republic | 0.9% | 18,083 |
| Austria | 0.8% | 16,439 |
| Luxembourg | 0.8% | 16,304 |
| Portugal | 0.5% | 9,482 |
| Iceland | 0.4% | 7,728 |
| Others | 2.0% | 39,341 |



Who do they come with?



| | Effortless trip | Total |
|-------------------------------------|-----------------|-------|
| Unaccompanied | 13.3% | 13.5% |
| Only with partner | 50.2% | 48.2% |
| Only with children (< 13 years old) | 3.7% | 3.9% |
| Partner + children (< 13 years old) | 4.9% | 4.9% |
| Other relatives | 8.3% | 8.4% |
| Friends | 7.9% | 8.5% |
| Work colleagues | 0.1% | 0.8% |
| Organized trip | 0.2% | 0.2% |
| Other combinations (1) | 11.4% | 11.5% |

(1) Different situations have been isolated

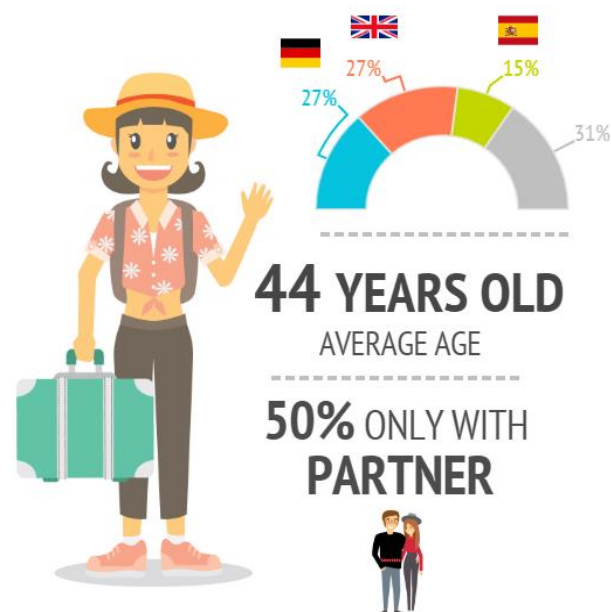
| | | |
|----------------------------------|--------------|--------------|
| Tourists with children | 12.3% | 12.5% |
| - Between 0 and 2 years old | 1.1% | 1.2% |
| - Between 3 and 12 years old | 10.2% | 10.2% |
| - Between 0-2 and 3-12 years | 1.0% | 1.0% |
| Tourists without children | 87.7% | 87.5% |
| Group composition: | | |
| - 1 person | 16.0% | 16.5% |
| - 2 people | 58.3% | 56.7% |
| - 3 people | 10.6% | 10.7% |
| - 4 or 5 people | 13.1% | 13.6% |
| - 6 or more people | 2.1% | 2.5% |
| Average group size: | 2.34 | 2.37 |

*People who share the main expenses of the trip

Who are they?



| | Effortless trip | Total |
|--------------------------------------|-----------------|-------|
| Gender | | |
| Men | 45.5% | 49.6% |
| Women | 54.5% | 50.4% |
| Age | | |
| Average age (tourist > 15 years old) | 44.0 | 43.3 |
| Standard deviation | 15.6 | 15.6 |
| Age range (> 15 years old) | | |
| 16 - 24 years old | 11.4% | 11.9% |
| 25 - 30 years old | 14.3% | 14.8% |
| 31 - 45 years old | 28.7% | 30.2% |
| 46 - 60 years old | 28.1% | 26.6% |
| Over 60 years old | 17.5% | 16.4% |
| Occupation | | |
| Salaried worker | 58.1% | 57.8% |
| Self-employed | 10.3% | 11.1% |
| Unemployed | 1.4% | 1.7% |
| Business owner | 9.3% | 10.0% |
| Student | 5.7% | 5.9% |
| Retired | 13.8% | 12.2% |
| Unpaid domestic work | 0.6% | 0.5% |
| Others | 0.8% | 0.9% |
| Annual household income level | | |
| Less than €25,000 | 16.0% | 16.1% |
| €25,000 - €49,999 | 36.2% | 37.0% |
| €50,000 - €74,999 | 22.8% | 23.4% |
| More than €74,999 | 24.9% | 23.5% |
| Education level | | |
| No studies | 2.8% | 2.2% |
| Primary education | 2.3% | 2.2% |
| Secondary education | 18.5% | 18.8% |
| Higher education | 76.4% | 76.9% |



Pictures: Freepik.com