Canary Islands LATITUDE OF LIFE

How many are they and how much do they spend?

TOURISTS	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourist arrivals (FRONTUR) (*)	**97.6**	**100.9**	**112.7**	**98.0**	**409.2**
Tourist arrivals > 15 years old (EGT) (*)	**86.6**	**85.2**	**92.8**	**95.2**	**359.8**
- book holiday package (*)	46.7	44.3	59.8	48.9	**199.5**
- do not book holiday package (*)	39.9	40.9	33.1	46.3	**160.2**
- % tourists who book holiday package	53.9%	52.0%	64.4%	51.3%	**55.5%**

(*) Thousand of tourists

TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4
97,563	100,874	112,735	97,992
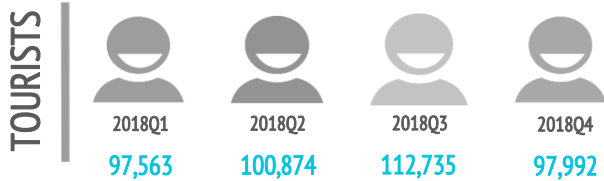
% TOURISTS WHO BOOK HOLIDAY PACKAGE

2018Q1	54%
2018Q2	52%
2018Q3	64%
2018Q4	51%

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	**1,386**	**1,292**	**1,424**	**1,331**	**1,359**
- book holiday package	1,528	1,460	1,609	1,677	**1,573**
- holiday package	1,293	1,232	1,368	1,424	**1,334**
- others	234	228	240	253	**239**
- do not book holiday package	1,220	1,110	1,091	966	**1,092**
- flight	339	312	343	249	**307**
- accommodation	460	344	332	284	**353**
- others	421	454	416	432	**432**
Average lenght of stay	**11.03**	**10.18**	**9.66**	**9.65**	**10.11**
- book holiday package	8.84	9.62	8.63	8.92	**8.97**
- do not book holiday package	13.59	10.79	11.51	10.42	**11.53**
Average daily expenditure (€)	**153.8**	**149.6**	**161.4**	**164.9**	**157.7**
- book holiday package	192.4	174.8	192.2	209.3	**192.6**
- do not book holiday package	108.6	122.3	105.6	118.0	**114.2**
Total turnover (> 15 years old) (€m)	**120**	**110**	**132**	**127**	**489**
- book holiday package	71	65	96	82	**314**
- do not book holiday package	49	45	36	45	**175**

AVERAGE LENGHT OF STAY (nights)

2018Q1	2018Q2	2018Q3	2018Q4
11.03	10.18	9.66	9.65

EXPENDITURE PER TOURIST (€)

2018Q1	2018Q2	2018Q3	2018Q4
1,386	1,292	1,424	1,331
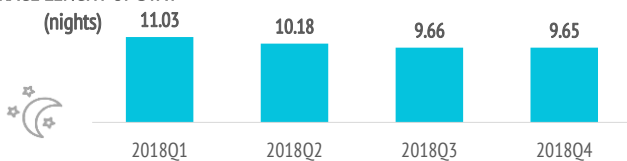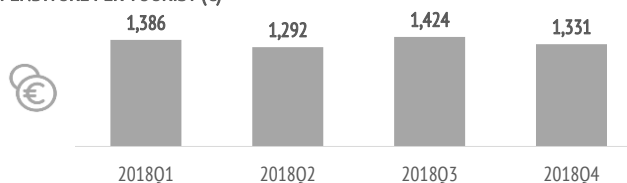
Importance of each factor in the destination choice

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	80.6%	73.5%	68.4%	82.1%	**76.2%**
Tranquility	50.5%	44.0%	50.2%	55.4%	**50.2%**
Safety	39.3%	36.6%	45.9%	45.6%	**42.0%**
Sea	32.3%	35.7%	40.2%	43.2%	**38.0%**
Landscapes	35.0%	35.5%	39.5%	38.2%	**37.1%**
European belonging	38.9%	32.0%	33.2%	38.1%	**35.6%**
Accommodation supply	33.0%	33.8%	36.6%	35.2%	**34.7%**
Price	22.0%	27.5%	35.1%	28.9%	**28.5%**
Environment	22.5%	24.2%	31.0%	32.2%	**27.6%**
Gastronomy	22.8%	24.5%	27.4%	33.3%	**27.2%**
Beaches	18.0%	28.1%	29.5%	26.3%	**25.6%**
Fun possibilities	15.3%	21.0%	28.3%	24.1%	**22.3%**
Authenticity	17.3%	14.5%	20.9%	22.4%	**18.9%**
Effortless trip	14.9%	18.1%	17.4%	21.0%	**17.9%**
Exoticism	14.8%	13.0%	20.6%	19.9%	**17.2%**
Hiking trail network	18.2%	11.5%	11.3%	18.6%	**14.9%**
Shopping	7.0%	9.5%	12.2%	13.4%	**10.6%**
Historical heritage	6.6%	7.1%	7.3%	10.7%	**8.0%**
Culture	4.9%	5.5%	6.3%	6.0%	**5.7%**
Nightlife	3.7%	3.4%	6.7%	6.0%	**5.0%**

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very import

% of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE SEA

| 2018Q1 | 32% | 2018Q3 | 40% |
| 2018Q2 | 36% | 2018Q4 | 43% |

What is the main motivation for their holidays?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	59.2%	55.1%	52.7%	54.7%	**55.3%**
Enjoy family time	8.9%	14.0%	14.1%	11.6%	**12.2%**
Have fun	6.0%	8.7%	10.4%	9.8%	**8.8%**
Explore the destination	21.9%	19.3%	20.8%	22.0%	**21.0%**
Practice their hobbies	1.8%	0.7%	1.3%	1.2%	**1.3%**
Other reasons	2.2%	2.3%	0.7%	0.7%	**1.4%**

How far in advance do they book their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.9%	0.8%	1.4%	2.0%	**1.3%**
Between 1 and 30 days	30.9%	28.0%	26.0%	21.8%	**26.5%**
Between 1 and 2 months	30.1%	25.1%	19.9%	22.7%	**24.3%**
Between 3 and 6 months	26.3%	32.9%	28.3%	39.6%	**31.9%**
More than 6 months	11.8%	13.2%	24.5%	13.9%	**16.0%**

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

2018Q1	11.8%
2018Q2	13.2%
2018Q3	24.5%
2018Q4	13.9%

Picture: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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

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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	54.0%	49.1%	36.5%	54.6%	**48.5%**
Friends or relatives	25.4%	27.7%	31.5%	23.5%	**27.0%**
Internet or social media	49.4%	48.6%	46.4%	43.1%	**46.8%**
Mass Media	1.2%	1.6%	0.0%	0.4%	**0.8%**
Travel guides and magazines	12.9%	9.8%	11.6%	11.1%	**11.4%**
Travel Blogs or Forums	4.8%	1.1%	1.9%	1.8%	**2.4%**
Travel TV Channels	0.0%	0.0%	0.0%	0.4%	**0.1%**
Tour Operator or Travel Agency	27.6%	26.9%	37.2%	30.7%	**30.8%**
Public administrations or similar	0.0%	0.0%	0.2%	0.0%	**0.1%**
Others	2.9%	1.2%	1.2%	3.2%	**2.1%**

* Multi-choise question

With whom did they book their flight and accommodation?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	47.5%	45.8%	33.2%	44.0%	**42.5%**
- Tour Operator or Travel Agency	52.5%	54.2%	66.8%	56.0%	**57.5%**
Accommodation					
- Directly with the accommodation	35.6%	32.1%	20.1%	27.9%	**28.7%**
- Tour Operator or Travel Agency	64.4%	67.9%	79.9%	72.1%	**71.3%**

Where do they stay?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	9.5%	13.1%	12.8%	8.7%	**11.0%**
4* Hotel	43.1%	36.6%	41.4%	35.6%	**39.2%**
5* Hotel / 5* Luxury Hotel	8.6%	8.7%	8.1%	15.1%	**10.2%**
Aparthotel / Tourist Villa	12.4%	19.9%	13.4%	13.5%	**14.7%**
House/room rented in a private dwelli	6.4%	7.6%	4.7%	4.2%	**5.7%**
Private accommodation [1]	12.3%	8.9%	8.7%	9.2%	**9.7%**
Others (Cottage, cruise, camping,..)	7.6%	5.1%	10.8%	13.7%	**9.5%**

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

What do they book?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	24.9%	27.4%	20.2%	26.6%	**24.7%**
Bed and Breakfast	9.3%	7.2%	3.2%	10.0%	**7.4%**
Half board	32.0%	25.1%	27.7%	34.0%	**29.8%**
Full board	3.6%	4.6%	4.3%	4.1%	**4.1%**
All inclusive	30.2%	35.6%	44.7%	25.3%	**33.9%**

33.9% of Belgians book all inclusive.

30.2% 2018Q1	20.2% 2018Q3
27.4% 2018Q2	26.6% 2018Q4

Other expenses

	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	63.2%	61.6%	53.1%	67.1%	**61.2%**
Supermarkets	57.7%	54.1%	50.0%	54.6%	**54.0%**
Car rental	27.1%	29.9%	29.4%	28.5%	**28.7%**
Organized excursions	19.8%	22.5%	37.1%	18.3%	**24.5%**
Taxi, transfer, chauffeur service	52.7%	54.3%	48.6%	43.6%	**49.6%**
Theme Parks	5.2%	4.4%	16.1%	5.6%	**7.9%**
Sport activities	6.4%	6.9%	9.2%	8.3%	**7.7%**
Museums	6.3%	3.7%	3.7%	5.1%	**4.7%**
Flights between islands	5.3%	3.7%	5.0%	6.1%	**5.0%**

Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.8%	1.1%	2.1%	0.8%	**1.2%**
1 - 2 hours	11.5%	12.9%	15.6%	14.7%	**13.7%**
3 - 6 hours	37.6%	37.3%	38.8%	37.5%	**37.8%**
7 - 12 hours	44.2%	40.0%	36.8%	39.3%	**40.0%**
More than 12 hours	5.9%	8.8%	6.7%	7.7%	**7.2%**

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

■ 0 hours ■ More than 1 hour ■ More than 3 hours ■ More than 7 hours ■ More than 12 hours

	2018Q1	2018Q2	2018Q3	2018Q4
0 hours	1%	1%	2%	1%
More than 1 hour	99%	99%	98%	99%
More than 3 hours	88%	86%	82%	84%
More than 7 hours	50%	49%	43%	47%
More than 12 hours	6%	9%	7%	8%
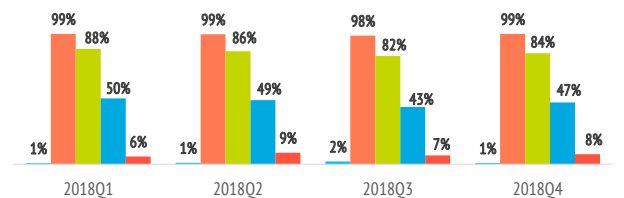
Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	80.0%	79.3%	69.7%	82.0%	**77.7%**
Swimming pool, hotel facilities	54.5%	62.1%	81.8%	62.2%	**65.4%**
Beach	43.2%	50.9%	65.7%	52.5%	**53.3%**
Explore the island on their own	46.6%	46.0%	42.1%	44.8%	**44.8%**
Organized excursions	12.4%	19.4%	28.2%	17.9%	**19.6%**
Taste Canarian gastronomy	20.7%	17.6%	18.6%	21.2%	**19.6%**
Sport activities	16.4%	13.2%	15.4%	14.3%	**14.8%**
Nature activities	15.8%	10.5%	15.0%	14.3%	**14.0%**
Theme parks	11.4%	8.7%	26.9%	7.5%	**13.7%**
Sea excursions / whale watching	7.9%	9.2%	22.7%	6.3%	**11.6%**
Activities at sea	6.1%	7.2%	18.1%	5.4%	**9.3%**
Nightlife / concerts / shows	5.7%	10.7%	10.9%	7.1%	**8.6%**
Wineries/markets/popular festival:	9.4%	6.2%	9.0%	7.1%	**7.9%**
Museums / exhibitions	10.6%	4.9%	5.6%	8.9%	**7.5%**
Beauty and health treatments	4.9%	5.2%	6.8%	9.1%	**6.6%**
Astronomical observation	4.8%	3.0%	7.1%	3.8%	**4.7%**

* Multi-choise question

Taste Canarian gastronomy
Nightlife
Sea excursions
Activities at sea
Museums
Theme parks
Walk
Beach
Sport activities
Nature activities
Organized excursions
Explore the island
Swimming pool
Wineries/markets
Astronomical observation
Beauty and health treatments

Which island do they choose?

Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	11,108	9,668	12,651	12,601	**46,028**
Fuerteventura	3,232	3,654	4,329	4,550	**15,765**
Gran Canaria	21,291	26,184	30,066	24,048	**101,589**
Tenerife	48,597	43,162	42,993	52,653	**187,405**
La Palma	1,389	1,490	2,776	859	**6,514**

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	13.0%	11.5%	13.6%	13.3%	**12.9%**
Fuerteventura	3.8%	4.3%	4.7%	4.8%	**4.4%**
Gran Canaria	24.9%	31.1%	32.4%	25.4%	**28.4%**
Tenerife	56.8%	51.3%	46.3%	55.6%	**52.5%**
La Palma	1.6%	1.8%	3.0%	0.9%	**1.8%**

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	88.1%	88.3%	90.7%	89.4%	**89.2%**
Two islands	8.7%	10.3%	8.3%	8.7%	**9.0%**
Three or more islands	3.2%	1.4%	1.0%	2.0%	**1.9%**

% TOURISTS BY ISLAND AND QUARTER OF TRIP

■ 2018Q1 ■ 2018Q2 ■ 2018Q3 ■ 2018Q4

	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
2018Q1	24%	21%	21%	26%	21%
2018Q2	21%	23%	26%	23%	23%
2018Q3	27%	27%	30%	23%	43%
2018Q4	27%	29%	24%	28%	13%
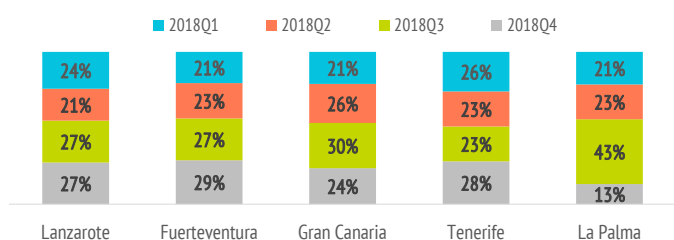
Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	19.7%	19.6%	15.2%	17.9%	**18.0%**
- Flights	18.3%	18.0%	16.4%	12.9%	**16.3%**
- Accommodation	24.3%	21.4%	21.3%	19.3%	**21.5%**
- Transport	17.1%	16.4%	15.8%	17.3%	**16.7%**
- Restaurants	23.1%	26.7%	26.6%	26.2%	**25.7%**
- Excursions	25.7%	25.2%	30.7%	22.1%	**26.2%**
- Activities	33.1%	35.5%	30.2%	33.6%	**32.9%**
Book or purchase					
- Tourist package	35.7%	33.4%	30.4%	32.0%	**32.8%**
- Flights	62.9%	59.7%	54.4%	67.2%	**60.9%**
- Accommodation	48.2%	44.4%	39.8%	48.7%	**45.2%**
- Transport	45.6%	38.2%	34.6%	42.5%	**40.0%**
- Restaurants	12.6%	9.4%	7.3%	13.8%	**10.6%**
- Excursions	7.6%	8.0%	12.1%	10.2%	**9.7%**
- Activities	6.9%	3.9%	11.9%	9.6%	**8.4%**

* Multi-choise question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	**10.5%**	**8.8%**	**4.4%**	**7.8%**	**7.8%**
Used the Internet	**89.5%**	**91.2%**	**95.6%**	**92.2%**	**92.2%**
- Own Internet connection	27.7%	25.7%	29.8%	29.3%	28.2%
- Free Wifi connection	45.5%	45.3%	50.9%	45.8%	46.9%
Applications*					
- Search for locations or maps	56.3%	57.1%	58.0%	54.2%	56.4%
- Search for destination info	42.1%	43.0%	44.8%	41.1%	42.7%
- Share pictures or trip videos	61.5%	63.6%	66.6%	67.4%	64.9%
- Download tourist apps	3.5%	6.2%	8.6%	6.5%	6.3%
- Others	23.5%	22.8%	21.2%	23.5%	22.7%

* Multi-choise question

● MOST VISITED PLACES IN EACH ISLAND ●

LANZAROTE — 51% MONTAÑA DEL FUEGO

FUERTEVENTURA — 41% PLAYAS DE JANDÍA

GRAN CANARIA — 59% DUNAS DE MASPALOMAS

TENERIFE — 41% PARQUE NACIONAL DEL TEIDE

LA PALMA — 78% SANTA CRUZ DE LA PALMA
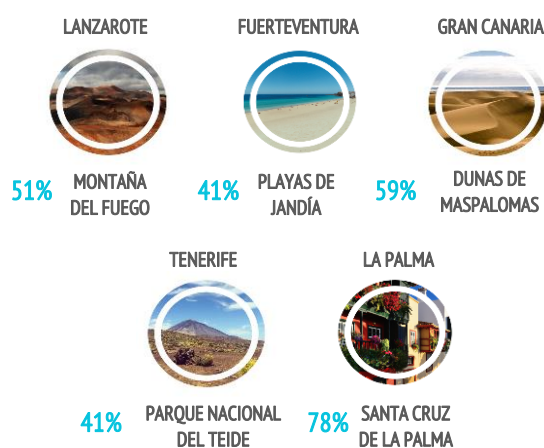
The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Average rating	8.42	8.69	8.48	8.62	**8.55**

Experience in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Worse or much worse than expected	3.6%	4.6%	3.6%	2.8%	**3.6%**
Lived up to expectations	68.6%	59.9%	63.0%	59.8%	**62.8%**
Better or much better than expected	27.8%	35.6%	33.4%	37.4%	**33.6%**

Future intentions (scale 1-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Return to the Canary Islands	8.61	8.46	8.29	8.84	**8.55**
Recommend visiting the Canary Islands	8.74	8.73	8.60	9.04	**8.78**

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	**74.3%**	**69.8%**	**56.5%**	**74.3%**	**68.7%**
Repeat tourists (last 5 years)	69.8%	60.3%	53.0%	71.2%	**63.6%**
Repeat tourists (last 5 years)(5 or more visits)	23.0%	19.3%	16.8%	30.5%	**22.5%**
At least 10 previous visits	**19.6%**	**15.2%**	**16.9%**	**21.0%**	**18.2%**

REPEAT TOURISTS
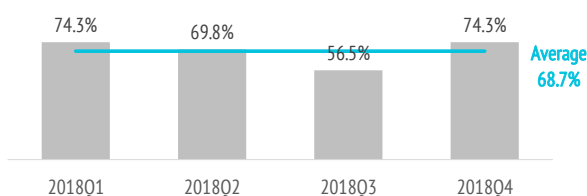
2018Q1	2018Q2	2018Q3	2018Q4	
74.3%	69.8%	56.5%	74.3%	Average 68.7%

Where does the flight come from? 🌐

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Belgium	85.1%	82.3%	83.0%	79.5%	**82.4%**
Netherlands	5.1%	8.3%	7.9%	10.8%	**8.1%**
Spanish Mainland	4.2%	4.2%	1.3%	3.7%	**3.3%**
Others	5.6%	5.1%	7.8%	6.1%	**6.2%**

% TOURISTS BY QUARTER OF TRIP

■ Belgium ■ Others

2018Q1	2018Q2	2018Q3	2018Q4
85% / 15%	82% / 18%	83% / 17%	79% / 21%
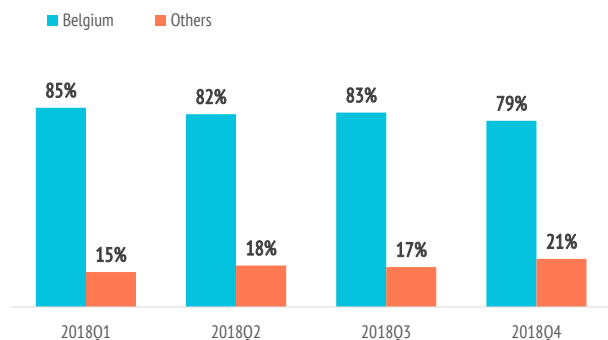
Who do they come with? 👥

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	10.2%	13.0%	4.8%	8.2%	**9.0%**
Only with partner	58.8%	51.1%	44.5%	53.3%	**51.8%**
Only with children (< 13 years old)	3.9%	3.5%	11.9%	5.0%	**6.2%**
Partner + children (< 13 years old)	3.3%	4.1%	8.0%	6.4%	**5.5%**
Other relatives	6.3%	5.3%	9.6%	6.7%	**7.0%**
Friends	6.3%	7.0%	4.2%	5.3%	**5.6%**
Work colleagues	0.4%	0.0%	0.0%	0.3%	**0.2%**
Organized trip	0.0%	0.0%	0.0%	0.3%	**0.1%**
Other combinations [1]	10.9%	16.0%	17.1%	14.5%	**14.7%**

(1) Different situations have been isolated

Tourists with children	**11.5%**	**11.5%**	**27.0%**	**15.3%**	**16.5%**
- Between 0 and 2 years old	2.2%	1.1%	1.6%	1.4%	**1.6%**
- Between 3 and 12 years old	7.9%	9.0%	22.7%	13.9%	**13.6%**
- Between 0 -2 and 3-12 years	1.4%	1.4%	2.7%	0.0%	**1.4%**
Tourists without children	**88.5%**	**88.5%**	**73.0%**	**84.7%**	**83.5%**
Group composition:					
- 1 person	15.0%	17.2%	6.9%	13.9%	**13.1%**
- 2 people	62.6%	57.4%	51.9%	56.0%	**56.9%**
- 3 people	9.5%	9.7%	18.7%	11.4%	**12.4%**
- 4 or 5 people	8.4%	13.5%	19.4%	14.7%	**14.1%**
- 6 or more people	4.5%	2.2%	3.2%	4.0%	**3.5%**
Average group size:	**2.38**	**2.31**	**2.67**	**2.61**	**2.50**

🗨 16.5% of Belgians travel with children.

(under the age of 13)

2018Q1	11.5%
2018Q2	11.5%
2018Q3	27.0%
2018Q4	15.3%
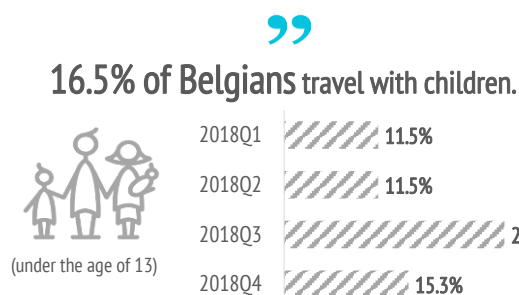
Who are they? 🧍

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	50.7%	46.1%	52.7%	50.5%	**50.1%**
Women	49.3%	53.9%	47.3%	49.5%	**49.9%**
Age					
Average age (tourist > 15 years old)	50.0	48.9	43.3	51.7	**48.5**
Standard deviation	14.9	15.1	13.8	13.2	**14.6**
Age range (> 15 years old)					
16 - 24 years old	3.1%	4.0%	9.7%	0.9%	**4.4%**
25 - 30 years old	9.5%	9.9%	11.4%	6.2%	**9.2%**
31 - 45 years old	26.6%	29.4%	33.6%	24.5%	**28.5%**
46 - 60 years old	31.0%	29.0%	33.2%	42.5%	**34.1%**
Over 60 years old	29.8%	27.6%	12.2%	26.0%	**23.7%**
Occupation					
Salaried worker	37.8%	40.9%	40.4%	43.1%	**40.6%**
Self-employed	9.8%	11.6%	13.1%	8.9%	**10.8%**
Unemployed	3.2%	0.3%	0.8%	1.4%	**1.4%**
Business owner	21.8%	14.4%	23.6%	16.4%	**19.1%**
Student	0.9%	4.2%	7.2%	1.0%	**3.3%**
Retired	23.6%	25.4%	12.9%	24.8%	**21.6%**
Unpaid domestic work	1.4%	0.4%	0.4%	1.4%	**0.9%**
Others	1.4%	2.7%	1.5%	3.0%	**2.2%**
Annual household income level					
Less than €25,000	16.8%	16.9%	27.8%	15.7%	**19.4%**
€25,000 - €49,999	45.2%	40.0%	47.5%	44.8%	**44.5%**
€50,000 - €74,999	25.4%	20.3%	19.4%	22.6%	**21.9%**
More than €74,999	12.6%	22.7%	5.3%	16.8%	**14.2%**
Education level					
No studies	2.2%	0.9%	0.6%	0.0%	**0.9%**
Primary education	3.1%	2.2%	1.9%	1.9%	**2.3%**
Secondary education	27.5%	30.6%	40.1%	34.6%	**33.4%**
Higher education	67.2%	66.3%	57.3%	63.5%	**63.5%**

AVERAGE AGE (> 15 years olf)

2018Q1	50.0
2018Q2	48.9
2018Q3	43.3
2018Q4	51.7

% OF TOURISTS WITH INCOMES OVER €74,999

● 2018Q1 ● 2018Q3
● 2018Q2 ● 2018Q4

13%	23%	5%	17%

% SALARIED WORKED TOURISTS

2018Q1	38%
2018Q2	41%
2018Q3	40%
2018Q4	43%

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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