

PROFILE OF TOURIST BY LOYALTY TO THE DESTINATION (2018)

TOURISTS VISITING THE CANARY ISLANDS FOR THE FIRST TIME

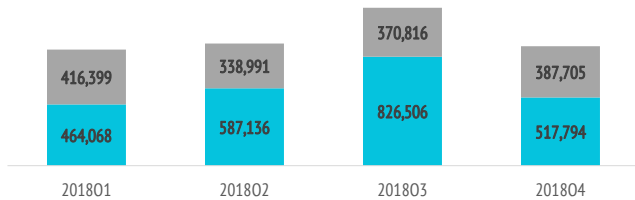
How many are they and how much do they spend?



	First visit	Total
TOURISTS		
Tourist arrivals (FRONTUR)	n.d.	15,559,787
Tourist arrivals > 15 years old (EGT)	3,909,415	13,485,651
- book holiday package	2,395,504	7,848,516
- do not book holiday package	1,513,911	5,637,135
- % tourists who book holiday package	61.3%	58.2%
Share of total tourist	29.0%	100%

TOURISTS BY QUARTER: FIRST VISIT

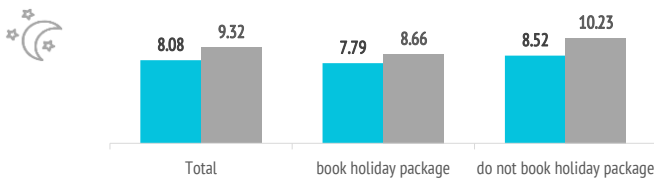
■ do not book holiday package ■ book holiday package



	First visit	Total
Expenditure per tourist (€)	1,092	1,196
- book holiday package	1,214	1,309
- holiday package	987	1,064
- others	228	246
- do not book holiday package	898	1,037
- flight	257	288
- accommodation	295	350
- others	346	399
Average length of stay	8.08	9.32
- book holiday package	7.79	8.66
- do not book holiday package	8.52	10.23
Average daily expenditure (€)	145.5	143.6
- book holiday package	161.0	159.8
- do not book holiday package	121.0	121.0
Total turnover (> 15 years old) (€m)	4,269	16,124
- book holiday package	2,909	10,277
- do not book holiday package	1,360	5,848

AVERAGE LENGTH OF STAY (nights)

■ First visit ■ Total



EXPENDITURE PER TOURIST (€)

■ First visit ■ Total



Importance of each factor in the destination choice



	First visit	Total
Climate	75.2%	78.1%
Safety	50.0%	51.4%
Tranquility	46.5%	46.2%
Sea	44.7%	43.3%
Landscapes	41.9%	31.6%
Environment	38.1%	30.6%
Accommodation supply	36.8%	41.7%
Beaches	35.8%	37.1%
Effortless trip	34.3%	34.8%
Price	33.3%	36.5%
European belonging	33.1%	35.8%
Gastronomy	28.1%	22.6%
Authenticity	24.7%	19.1%
Fun possibilities	20.7%	20.7%
Exoticism	12.6%	10.5%
Historical heritage	12.0%	7.1%
Hiking trail network	11.4%	9.0%
Culture	11.4%	7.3%
Shopping	10.7%	9.6%
Nightlife	7.5%	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?



	First visit	Total
Rest	47.2%	55.1%
Enjoy family time	12.0%	14.7%
Have fun	9.9%	7.8%
Explore the destination	27.7%	18.5%
Practice their hobbies	1.4%	1.8%
Other reasons	1.8%	2.1%

EXPLORE THE DESTINATION



How far in advance do they book their trip?



	First visit	Total
The same day	1.2%	0.7%
Between 1 and 30 days	27.3%	23.2%
Between 1 and 2 months	25.1%	23.0%
Between 3 and 6 months	31.3%	32.4%
More than 6 months	15.1%	20.7%

% TOURISTS BOOKING BETWEEN 1 AND 30 DAYS IN ADVANCE

FIRST VISIT
27.3%



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 visiting the Canary Islands for the first time.

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

	First visit	Total
Previous visits to the Canary Islands	0.0%	50.9%
Friends or relatives	40.4%	27.8%
Internet or social media	64.3%	56.1%
Mass Media	2.6%	1.7%
Travel guides and magazines	13.0%	9.5%
Travel Blogs or Forums	8.2%	5.4%
Travel TV Channels	0.9%	0.7%
Tour Operator or Travel Agency	28.3%	24.7%
Public administrations or similar	0.6%	0.4%
Others	2.9%	2.3%

* Multi-choice question

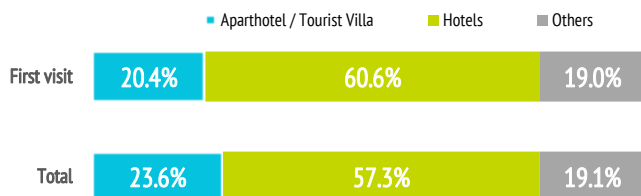
With whom did they book their flight and accommodation?

	First visit	Total
Flight		
- Directly with the airline	36.1%	39.5%
- Tour Operator or Travel Agency	63.9%	60.5%
Accommodation		
- Directly with the accommodation	27.1%	28.8%
- Tour Operator or Travel Agency	72.9%	71.2%

Where do they stay?

	First visit	Total
1-2-3* Hotel	14.1%	12.8%
4* Hotel	39.7%	37.7%
5* Hotel / 5* Luxury Hotel	6.8%	6.8%
Aparthotel / Tourist Villa	20.4%	23.6%
House/room rented in a private dwelling	6.6%	5.3%
Private accommodation (1)	5.0%	7.0%
Others (Cottage, cruise, camping,...)	7.4%	6.8%

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



What do they book?

	First visit	Total
Room only	24.9%	28.8%
Bed and Breakfast	12.5%	11.7%
Half board	21.8%	22.4%
Full board	3.6%	3.0%
All inclusive	37.1%	34.1%

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37.1% of tourists book all inclusive.
(Canary Islands: 34.1%)

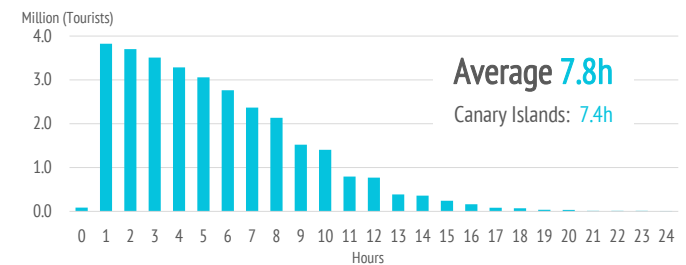
Other expenses

	First visit	Total
Restaurants or cafes	60.0%	63.2%
Supermarkets	53.5%	55.9%
Car rental	30.4%	26.6%
Organized excursions	29.0%	21.8%
Taxi, transfer, chauffeur service	51.5%	51.7%
Theme Parks	11.1%	8.8%
Sport activities	7.1%	6.4%
Museums	6.1%	5.0%
Flights between islands	5.8%	4.8%

Activities in the Canary Islands

Outdoor time per day	First visit	Total
0 hours	2.2%	2.2%
1 - 2 hours	8.1%	10.0%
3 - 6 hours	29.2%	32.6%
7 - 12 hours	50.7%	46.5%
More than 12 hours	9.9%	8.7%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	First visit	Total
Beach	72.6%	68.0%
Walk, wander	67.8%	71.0%
Swimming pool, hotel facilities	57.5%	58.9%
Explore the island on their own	52.2%	46.5%
Taste Canarian gastronomy	25.5%	25.4%
Organized excursions	25.2%	17.9%
Theme parks	20.2%	15.5%
Sea excursions / whale watching	16.0%	11.3%
Nightlife / concerts / shows	15.7%	15.5%
Sport activities	14.1%	14.3%
Wineries / markets / popular festivals	12.1%	12.0%
Museums / exhibitions	11.8%	9.8%
Nature activities	11.6%	10.0%
Activities at sea	10.4%	9.8%
Beauty and health treatments	5.5%	5.7%
Astronomical observation	4.1%	3.4%

* Multi-choice question

FIRST VISIT **TOTAL**
ORGANIZED EXCURSIONS 25.2% 17.9%

SEA EXCURSIONS / WHALE WATCHING 16.0% 11.3%



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Which island do they choose?

Tourist > 15 years old	Canarias	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
First visit	3,909,415	578,233	549,028	1,033,522	1,665,581	52,549
- Share by islands	100%	14.8%	14.0%	26.4%	42.6%	1.3%
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%
% First visit	29.0%	23.5%	29.6%	27.0%	33.4%	21.1%

How many islands do they visit during their trip?

	First visit	Total
One island	89.0%	90.9%
Two islands	9.7%	7.7%
Three or more islands	1.3%	1.4%

Internet usage during their trip

	First visit	Total
Research		
- Tourist package	16.7%	15.4%
- Flights	14.1%	13.0%
- Accommodation	18.8%	17.7%
- Transport	19.7%	15.6%
- Restaurants	30.8%	27.0%
- Excursions	31.8%	26.3%
- Activities	37.0%	31.0%
Book or purchase		
- Tourist package	35.1%	38.1%
- Flights	60.6%	64.4%
- Accommodation	53.9%	54.5%
- Transport	42.4%	44.7%
- Restaurants	10.3%	10.5%
- Excursions	13.7%	11.4%
- Activities	14.7%	12.5%

* Multi-choice question

Internet usage in the Canary Islands	First visit	Total
Did not use the Internet	9.4%	9.8%
Used the Internet	90.6%	90.2%
- Own Internet connection	41.7%	36.5%
- Free Wifi connection	36.8%	41.1%
Applications*		
- Search for locations or maps	70.0%	60.7%
- Search for destination info	50.3%	44.7%
- Share pictures or trip videos	59.5%	55.6%
- Download tourist apps	6.9%	6.5%
- Others	16.8%	23.9%

* Multi-choice question

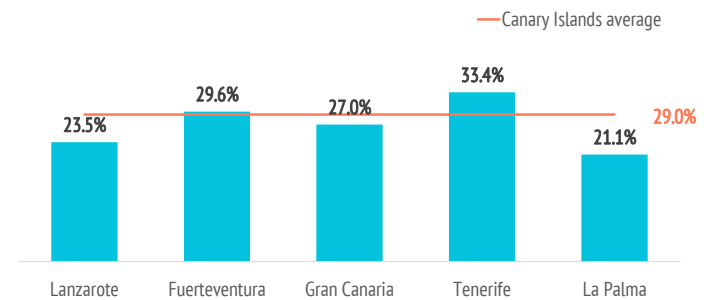


59.5% of tourists share pictures or trip videos during their stay in the Canary Islands

(Canary Islands: 55.6%)



% TOURISTS BY ISLAND OF STAY

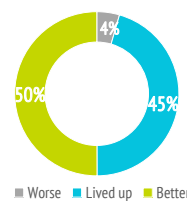


How do they rate the Canary Islands?

Satisfaction (scale 0-10)	First visit	Total
Average rating	8.40	8.58

Experience in the Canary Islands	First visit	Total
Worse or much worse than expected	4.5%	2.9%
Lived up to expectations	45.5%	57.4%
Better or much better than expected	50.0%	39.7%

Future intentions (scale 1-10)	First visit	Total
Return to the Canary Islands	7.87	8.60
Recommend visiting the Canary Islands	8.44	8.86



Experience in the Canary



Return to the Canary Islands



Recommend visiting the Canary Islands

How many are loyal to the Canary Islands?

	First visit	Total
Repeat tourists	--	71.0%
Repeat tourists (last 5 years)	--	64.6%
Repeat tourists (last 5 years) (5 or more visits)	--	18.4%
At least 10 previous visits	--	17.8%

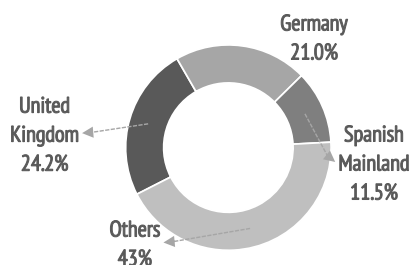
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Where are they from?



	%	Absolute
United Kingdom	24.2%	944,749
Germany	21.0%	819,283
Spanish Mainland	11.5%	450,802
France	6.7%	263,217
Italy	5.5%	216,677
Netherlands	4.5%	176,301
Poland	4.0%	154,574
Belgium	2.9%	112,783
Switzerland	2.9%	111,432
Sweden	2.4%	94,053
Ireland	2.0%	78,468
Denmark	1.6%	60,871
Austria	1.4%	53,182
Norway	1.3%	49,389
Finland	0.9%	35,845
Russia	0.8%	31,242
Czech Republic	0.7%	26,194
Others	5.9%	230,354



Who do they come with?



	First visit	Total
Unaccompanied	7.7%	8.9%
Only with partner	46.3%	47.4%
Only with children (< 13 years old)	6.3%	5.9%
Partner + children (< 13 years old)	7.3%	7.2%
Other relatives	9.0%	9.0%
Friends	8.7%	6.3%
Work colleagues	0.7%	0.5%
Organized trip	0.3%	0.2%
Other combinations ⁽¹⁾	13.7%	14.6%

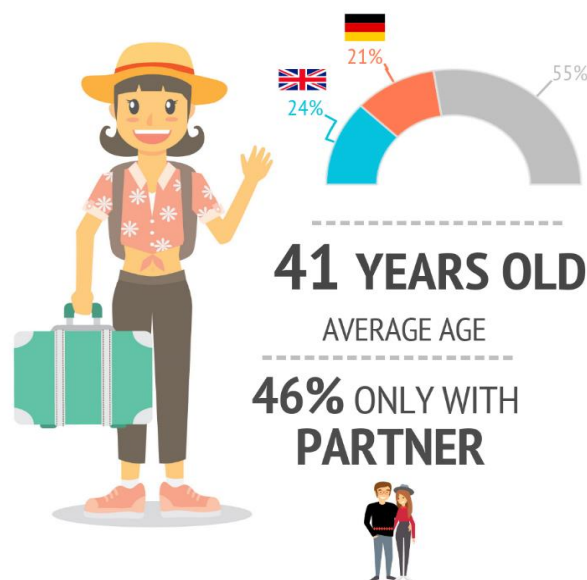
(1) Different situations have been isolated

Tourists with children	19.3%	19.3%
- Between 0 and 2 years old	2.1%	1.8%
- Between 3 and 12 years old	15.4%	15.8%
- Between 0 -2 and 3-12 years	1.8%	1.6%
Tourists without children	80.7%	80.7%
Group composition:		
- 1 person	12.2%	12.4%
- 2 people	53.9%	54.1%
- 3 people	13.5%	12.6%
- 4 or 5 people	16.8%	17.1%
- 6 or more people	3.7%	3.8%
Average group size:	2.58	2.58

Who are they?



	First visit	Total
Gender		
Men	47.5%	48.2%
Women	52.5%	51.8%
Age		
Average age (tourist > 15 years old)	40.5	46.7
Standard deviation	14.6	15.3
Age range (> 15 years old)		
16 - 24 years old	13.6%	7.7%
25 - 30 years old	18.0%	10.8%
31 - 45 years old	32.5%	28.6%
46 - 60 years old	24.6%	31.3%
Over 60 years old	11.2%	21.5%
Occupation		
Salaried worker	60.6%	55.5%
Self-employed	11.0%	11.0%
Unemployed	1.5%	1.1%
Business owner	9.2%	9.2%
Student	7.3%	4.2%
Retired	9.0%	17.3%
Unpaid domestic work	0.8%	0.9%
Others	0.7%	0.8%
Annual household income level		
Less than €25,000	21.7%	17.0%
€25,000 - €49,999	37.2%	36.5%
€50,000 - €74,999	23.1%	25.0%
More than €74,999	18.0%	21.5%
Education level		
No studies	3.7%	4.8%
Primary education	2.5%	2.8%
Secondary education	21.0%	23.1%
Higher education	72.8%	69.3%



Pictures: Freepik.com