

PROFILE OF TOURIST BY LOYALTY TO THE DESTINATION (2018) COMPARISON



How many are they and how much do they spend?



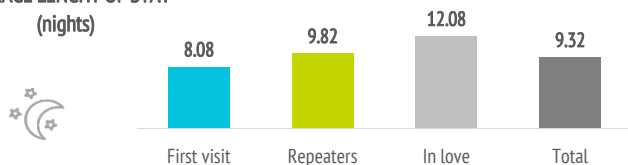
	First visit	Repeaters	In love	Total
TOURISTS				
Tourist arrivals (FRONTUR) (MM)	n.d.	n.d.	n.d.	15.56
Tourist arrivals > 15 years old (EGT) (MM)	3.91	9.58	2.40	13.49
- book holiday package (MM)	2.40	5.45	1.10	7.85
- do not book holiday package (MM)	1.51	4.12	1.31	5.64
- % tourists who book holiday package	61.3%	56.9%	45.6%	58.2%
Share of total tourist	29.0%	71.0%	17.8%	100%

% TOURISTS WHO BOOK HOLIDAY PACKAGE

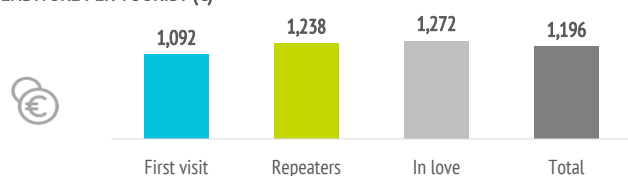


	First visit	Repeaters	In love	Total
Expenditure per tourist (€)	1,092	1,238	1,272	1,196
- book holiday package	1,214	1,351	1,422	1,309
- holiday package	987	1,097	1,144	1,064
- others	228	254	278	246
- do not book holiday package	898	1,088	1,147	1,037
- flight	257	299	324	288
- accommodation	295	371	349	350
- others	346	418	474	399
Average length of stay	8.08	9.82	12.08	9.32
- book holiday package	7.79	9.04	10.50	8.66
- do not book holiday package	8.52	10.86	13.39	10.23
Average daily expenditure (€)	145.5	142.8	126.9	143.6
- book holiday package	161.0	159.3	146.9	159.8
- do not book holiday package	121.0	121.0	110.2	121.0
Total turnover (> 15 years old) (€m)	4,269	11,855	3,059	16,124
- book holiday package	2,909	7,367	1,558	10,277
- do not book holiday package	1,360	4,488	1,500	5,848

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	First visit	Repeaters	In love	Total
Climate	72.4%	80.4%	80.5%	78.1%
Safety	48.0%	52.8%	54.5%	51.4%
Tranquility	43.4%	47.3%	50.9%	46.2%
Sea	45.7%	42.4%	42.7%	43.3%
Accommodation supply	38.2%	43.2%	43.4%	41.7%
Beaches	38.8%	36.4%	37.6%	37.1%
Price	36.7%	36.4%	35.1%	36.5%
European belonging	32.3%	37.2%	40.8%	35.8%
Effortless trip	30.5%	36.5%	39.5%	34.8%
Landscapes	36.6%	29.6%	28.2%	31.6%
Environment	30.9%	30.5%	31.8%	30.6%
Gastronomy	20.9%	23.2%	26.6%	22.6%
Fun possibilities	22.9%	19.8%	18.3%	20.7%
Authenticity	20.9%	18.4%	18.4%	19.1%
Exoticism	14.1%	9.0%	7.7%	10.5%
Shopping	9.4%	9.6%	10.9%	9.6%
Hiking trail network	9.7%	8.7%	10.1%	9.0%
Nightlife	7.7%	7.4%	8.5%	7.5%
Culture	8.4%	6.8%	6.8%	7.3%
Historical heritage	8.2%	6.6%	6.6%	7.1%

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.

% TOURISTS WHO CHOOSE SAFETY



What is the main motivation for their holidays?



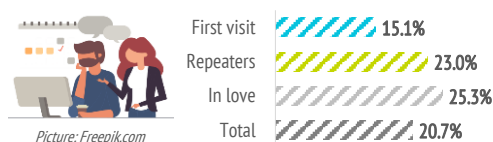
	First visit	Repeaters	In love	Total
Rest	47.2%	58.4%	64.0%	55.1%
Enjoy family time	12.0%	15.8%	16.8%	14.7%
Have fun	9.9%	6.9%	5.6%	7.8%
Explore the destination	27.7%	14.7%	8.9%	18.5%
Practice their hobbies	1.4%	1.9%	2.0%	1.8%
Other reasons	1.8%	2.2%	2.8%	2.1%

How far in advance do they book their trip?



	First visit	Repeaters	In love	Total
The same day	1.2%	0.5%	0.6%	0.7%
Between 1 and 30 days	27.3%	21.5%	20.8%	23.2%
Between 1 and 2 months	25.1%	22.1%	20.9%	23.0%
Between 3 and 6 months	31.3%	32.9%	32.4%	32.4%
More than 6 months	15.1%	23.0%	25.3%	20.7%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



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.

PROFILE OF TOURIST BY LOYALTY TO THE DESTINATION (2018)

COMPARISON



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

	First visit	Repeaters	In love	Total
Previous visits to the Canary Islands	0.0%	71.7%	81.7%	50.9%
Friends or relatives	40.4%	22.6%	18.8%	27.8%
Internet or social media	64.3%	52.8%	44.1%	56.1%
Mass Media	2.6%	1.4%	0.9%	1.7%
Travel guides and magazines	13.0%	8.0%	4.7%	9.5%
Travel Blogs or Forums	8.2%	4.2%	2.2%	5.4%
Travel TV Channels	0.9%	0.6%	0.6%	0.7%
Tour Operator or Travel Agency	28.3%	23.2%	17.6%	24.7%
Public administrations or similar	0.6%	0.4%	0.2%	0.4%
Others	2.9%	2.1%	2.5%	2.3%

* Multi-choise question

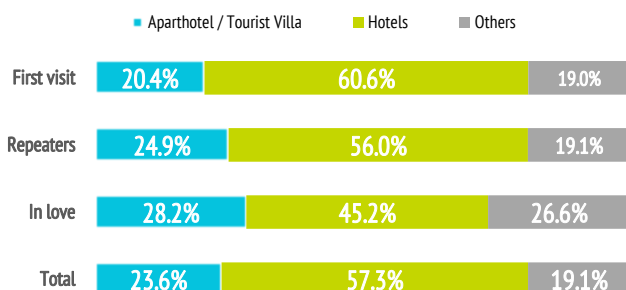
With whom did they book their flight and accommodation?

	First visit	Repeaters	In love	Total
Flight				
- Directly with the airline	36.1%	40.8%	50.6%	39.5%
- Tour Operator or Travel Agency	63.9%	59.2%	49.4%	60.5%
Accommodation				
- Directly with the accommodation	27.1%	29.5%	33.7%	28.8%
- Tour Operator or Travel Agency	72.9%	70.5%	66.3%	71.2%

Where do they stay?

	First visit	Repeaters	In love	Total
1-2-3* Hotel	14.1%	12.2%	10.2%	12.8%
4* Hotel	39.7%	36.9%	29.1%	37.7%
5* Hotel / 5* Luxury Hotel	6.8%	6.9%	5.9%	6.8%
Aparthotel / Tourist Villa	20.4%	24.9%	28.2%	23.6%
House/room rented in a private dwelling	6.6%	4.7%	3.8%	5.3%
Private accommodation (1)	5.0%	7.8%	15.5%	7.0%
Others (Cottage, cruise, camping...)	7.4%	6.6%	7.2%	6.8%

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



What do they book?

	First visit	Repeaters	In love	Total
Room only	24.9%	30.4%	38.8%	28.8%
Bed and Breakfast	12.5%	11.3%	11.1%	11.7%
Half board	21.8%	22.7%	21.4%	22.4%
Full board	3.6%	2.8%	2.2%	3.0%
All inclusive	37.1%	32.8%	26.4%	34.1%

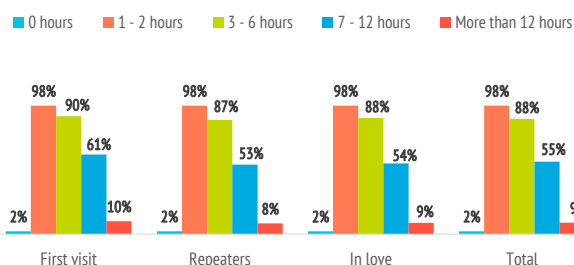
Other expenses

	First visit	Repeaters	In love	Total
Restaurants or cafes	60.0%	64.6%	69.1%	63.2%
Supermarkets	53.5%	56.9%	60.5%	55.9%
Car rental	30.4%	25.0%	21.9%	26.6%
Organized excursions	29.0%	18.9%	11.3%	21.8%
Taxi, transfer, chauffeur service	51.5%	51.8%	47.2%	51.7%
Theme Parks	11.1%	7.9%	4.7%	8.8%
Sport activities	7.1%	6.1%	4.8%	6.4%
Museums	6.1%	4.6%	3.2%	5.0%
Flights between islands	5.8%	4.4%	3.6%	4.8%

Activities in the Canary Islands

	First visit	Repeaters	In love	Total
Outdoor time per day				
0 hours	2.2%	2.2%	2.1%	2.2%
1 - 2 hours	8.1%	10.9%	9.4%	10.0%
3 - 6 hours	29.2%	34.0%	34.6%	32.6%
7 - 12 hours	50.7%	44.7%	45.3%	46.5%
More than 12 hours	9.9%	8.2%	8.6%	8.7%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

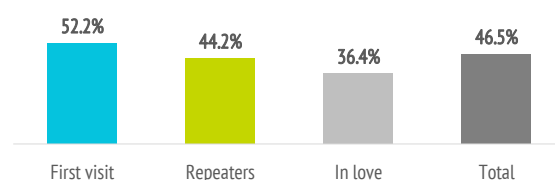


Activities in the Canary Islands

	First visit	Repeaters	In love	Total
Walk, wander	67.8%	72.3%	72.3%	71.0%
Beach	72.6%	66.1%	60.1%	68.0%
Swimming pool, hotel facilities	57%	59.5%	52.8%	58.9%
Explore the island on their own	52.2%	44.2%	36.4%	46.5%
Taste Canarian gastronomy	25.5%	25.3%	25.3%	25.4%
Organized excursions	25.2%	15%	7.9%	17.9%
Theme parks	20.2%	13.6%	8.3%	15.5%
Nightlife / concerts / shows	15.7%	15.4%	16.5%	15.5%
Sport activities	14.1%	14.3%	13.5%	14.3%
Wineries / markets / popular festivals	12.1%	12.0%	11.3%	12.0%
Sea excursions / whale watching	16.0%	9.3%	5.8%	11.3%
Nature activities	11.6%	9.4%	8.1%	10.0%
Museums / exhibitions	11.8%	9.0%	6.5%	9.8%
Activities at sea	10.4%	9.5%	9.0%	9.8%
Beauty and health treatments	5.5%	5.7%	5.7%	5.7%
Astronomical observation	4.1%	3.1%	2.5%	3.4%

* Multi-choise question

% TOURISTS WHO EXPLORE THE ISLAND ON THEIR OWN



PROFILE OF TOURIST BY LOYALTY TO THE DESTINATION (2018) COMPARISON



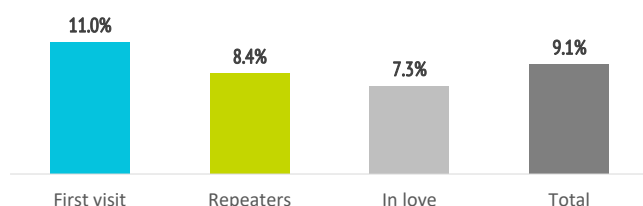
Which island do they choose?

Tourists (> 15 years old)	First visit	Repeaters	In love	Total
Lanzarote	578,233	1,878,886	490,706	2,457,120
Fuerteventura	549,028	1,307,677	309,903	1,856,705
Gran Canaria	1,033,522	2,791,587	787,150	3,825,110
Tenerife	1,665,581	3,325,592	762,812	4,991,173
La Palma	52,549	196,520	37,677	249,069

How many islands do they visit during their trip?

	First visit	Repeaters	In love	Total
One island	89.0%	91.6%	92.7%	90.9%
Two islands	9.7%	6.9%	6.0%	7.7%
Three or more islands	1.3%	1.4%	1.3%	1.4%

% TOURISTS WHO VISIT MORE THAN ONE ISLAND



Internet usage during their trip

	First visit	Repeaters	In love	Total
Research				
- Tourist package	16.7%	14.8%	11.4%	15.4%
- Flights	14.1%	12.6%	9.7%	13.0%
- Accommodation	18.8%	17.2%	12.6%	17.7%
- Transport	19.7%	13.7%	9.7%	15.6%
- Restaurants	30.8%	25.2%	19.3%	27.0%
- Excursions	31.8%	23.6%	15.0%	26.3%
- Activities	37.0%	28.0%	18.6%	31.0%
Book or purchase				
- Tourist package	35.1%	39.4%	34.8%	38.1%
- Flights	60.6%	66.0%	70.8%	64.4%
- Accommodation	53.9%	54.8%	51.1%	54.5%
- Transport	42.4%	45.7%	42.2%	44.7%
- Restaurants	10.3%	10.6%	10.4%	10.5%
- Excursions	13.7%	10.3%	6.6%	11.4%
- Activities	14.7%	11.4%	8.5%	12.5%

* Multi-choise question

Internet usage in the Canary Islands	First visit	Repeaters	In love	Total
Did not use the Internet	9.4%	9.9%	12.5%	9.8%
Used the Internet	90.6%	90.1%	87.5%	90.2%
- Own Internet connection	41.7%	34.4%	33.3%	36.5%
- Free Wifi connection	36.8%	42.9%	41.0%	41.1%

Applications*

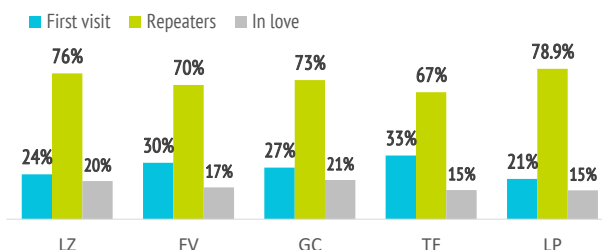
	First visit	Repeaters	In love	Total
- Search for locations or maps	70.0%	56.9%	44.9%	60.7%
- Search for destination info	50.3%	42.4%	33.5%	44.7%
- Share pictures or trip videos	59.5%	54.1%	49.5%	55.6%
- Download tourist apps	6.9%	6.4%	5.4%	6.5%
- Others	16.8%	26.8%	35.0%	23.9%

* Multi-choise question

Share by islands

	First visit	Repeaters	In love	Total
Lanzarote	14.9%	19.8%	20.5%	18.4%
Fuerteventura	14.2%	13.8%	13.0%	13.9%
Gran Canaria	26.6%	29.4%	33.0%	28.6%
Tenerife	42.9%	35.0%	31.9%	37.3%
La Palma	1.4%	2.1%	1.6%	1.9%

% TOURISTS BY ISLANDS



How do they rate the Canary Islands?

Satisfaction (scale 0-10)	First visit	Repeaters	In love	Total
Average rating	8.40	8.66	8.80	8.58

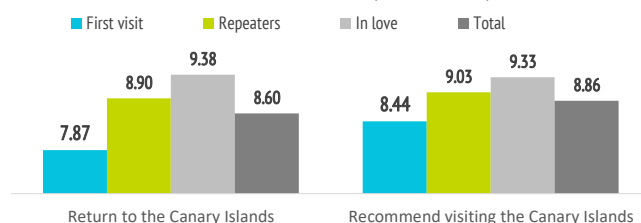
Experience in the Canary Islands	First visit	Repeaters	In love	Total
Worse or much worse than expected	4.5%	2.3%	1.8%	2.9%
Lived up to expectations	45.5%	62.3%	69.5%	57.4%
Better or much better than expected	50.0%	35.5%	28.7%	39.7%

EXPERIENCE: BETTER OR MUCH BETTER THAN EXPECTED



Future intentions (scale 1-10)	First visit	Repeaters	In love	Total
Return to the Canary Islands	7.87	8.90	9.38	8.60
Recommend visiting the Canary Islands	8.44	9.03	9.33	8.86

FUTURE INTENTIONS (SCALE 0-10)



How many are loyal to the Canary Islands?

	First visit	Repeaters	In love	Total
Repeat tourists	--	100%	100%	71.0%
Repeat tourists (last 5 years)	--	91.0%	98.3%	64.6%
Repeat tourists (last 5 years) (5 or more visits)	--	26.0%	69.7%	18.4%
At least 10 previous visits	--	25.1%	100%	17.8%

PROFILE OF TOURIST BY LOYALTY TO THE DESTINATION (2018)

COMPARISON



Where are they from?



	First visit	Repeaters	In love	Total
United Kingdom	24.2%	34.8%	37.9%	31.7%
Germany	21.0%	20.1%	18.4%	20.4%
Spanish Mainland	11.5%	11.4%	11.6%	11.5%
Netherlands	4.5%	3.7%	3.1%	4.0%
France	6.7%	2.5%	1.5%	3.8%
Sweden	2.4%	4.2%	4.4%	3.7%
Ireland	2.0%	4.0%	4.5%	3.4%
Italy	5.5%	2.4%	1.4%	3.3%
Norway	1.3%	3.5%	5.1%	2.8%
Belgium	2.9%	2.6%	2.7%	2.7%
Switzerland	2.9%	1.8%	1.7%	2.1%
Poland	4.0%	1.3%	0.3%	2.1%
Denmark	1.6%	2.2%	2.4%	2.0%
Finland	0.9%	1.9%	2.2%	1.6%
Austria	1.4%	0.7%	0.8%	0.9%
Russia	0.8%	0.4%	0.2%	0.5%
Czech Republic	0.7%	0.3%	0.2%	0.4%
Others	5.9%	2.2%	1.6%	3.3%

Who do they come with?



	First visit	Repeaters	In love	Total
Unaccompanied	7.7%	9.3%	14.8%	8.9%
Only with partner	46%	48%	52%	47%
Only with children (< 13 years old)	6.3%	5.8%	3.5%	5.9%
Partner + children (< 13 years old)	7.3%	7.2%	4.2%	7.2%
Other relatives	9.0%	9.1%	8.3%	9.0%
Friends	8.7%	5.3%	4.0%	6.3%
Work colleagues	0.7%	0.4%	0.3%	0.5%
Organized trip	0.3%	0.2%	0.1%	0.2%
Other combinations (1)	13.7%	15.0%	13.0%	14.6%

(1) Different situations have been isolated

Tourists with children	19.3%	19.2%	12.5%	19.3%
- Between 0 and 2 years old	2.1%	1.7%	0.8%	1.8%
- Between 3 and 12 years old	15.4%	16.0%	10.6%	15.8%
- Between 0 -2 and 3-12 years old	1.8%	1.5%	1.1%	1.6%
Tourists without children	80.7%	80.8%	87.5%	80.7%
Group composition:				
- 1 person	12.2%	12.5%	18.4%	12.4%
- 2 people	53.9%	54.3%	57.0%	54.1%
- 3 people	13.5%	12.2%	9.7%	12.6%
- 4 or 5 people	16.8%	17.2%	12.0%	17.1%
- 6 or more people	3.7%	3.8%	3.0%	3.8%
Average group size:	2.58	2.58	2.33	2.58

Who are they?



	First visit	Repeaters	In love	Total
Gender				
Men	47.5%	48.5%	50.5%	48.2%
Women	52.5%	51.5%	49.5%	51.8%
Age				
Average age (tourist > 15 years old)	40.5	49.2	54.4	46.7
Standard deviation	14.6	14.9	14.7	15.3
Age range (> 15 years old)				
16 - 24 years old	13.6%	5.3%	3.5%	7.7%
25 - 30 years old	18.0%	7.9%	4.9%	10.8%
31 - 45 years old	32.5%	27.1%	17.9%	28.6%
46 - 60 years old	24.6%	34.1%	35.0%	31.3%
Over 60 years old	11.2%	25.7%	38.8%	21.5%
Occupation				
Salaried worker	60.6%	53.4%	42.7%	55.5%
Self-employed	11.0%	11.1%	10.8%	11.0%
Unemployed	1.5%	0.9%	0.9%	1.1%
Business owner	9.2%	9.2%	9.2%	9.2%
Student	7.3%	2.9%	2.1%	4.2%
Retired	9.0%	20.7%	32.1%	17.3%
Unpaid domestic work	0.8%	0.9%	1.0%	0.9%
Others	0.7%	0.8%	1.1%	0.8%
Annual household income level				
Less than €25,000	21.7%	15.1%	15.2%	17.0%
€25,000 - €49,999	37.2%	36.3%	35.6%	36.5%
€50,000 - €74,999	23.1%	25.8%	26.1%	25.0%
More than €74,999	18.0%	22.8%	23.1%	21.5%
Education level				
No studies	3.7%	5.2%	5.3%	4.8%
Primary education	2.5%	3.0%	3.2%	2.8%
Secondary education	21.0%	23.9%	24.9%	23.1%
Higher education	72.8%	67.9%	66.6%	69.3%



% MEN



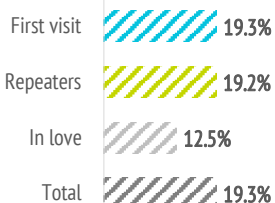
% OF TOURISTS WITH INCOMES OVER €74,999



% TOURISTS WHO TRAVEL WITH CHILDREN



(Under the age of 13)



% TOURISTS WHO TRAVEL WITH PARTNER



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

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