Canary Islands — LATITUDE OF LIFE

How many are they and how much do they spend? 👤€

TOURISTS	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourist arrivals (FRONTUR) *(*)*	161.1	144.2	170.3	143.9	619.5
Tourist arrivals > 15 years old (EGT) *(*)*	147.0	120.0	137.4	130.2	534.6
- book holiday package *(*)*	95.0	85.2	109.1	86.1	375.4
- do not book holiday package *(*)*	52.0	34.8	28.3	44.1	159.2
- % tourists who book holiday package	64.6%	71.0%	79.4%	66.1%	70.2%

(*) Thousand of tourists

TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4
161,145	144,192	170,339	143,863
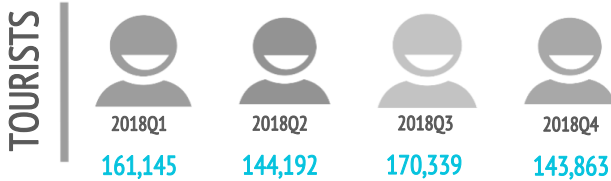
% TOURISTS WHO BOOK HOLIDAY PACKAGE

2018Q1	65%
2018Q2	71%
2018Q3	79%
2018Q4	66%
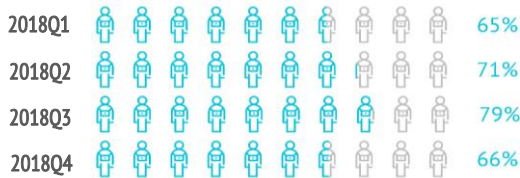
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	**1,066**	**1,168**	**1,238**	**1,094**	**1,140**
- book holiday package	1,184	1,231	1,354	1,224	**1,253**
- holiday package	961	967	1,034	982	**988**
- others	223	264	319	242	**265**
- do not book holiday package	851	1,016	795	839	**874**
- flight	250	272	239	239	**250**
- accommodation	305	411	241	265	**306**
- others	295	333	315	335	**318**
Average lenght of stay	**9.21**	**9.09**	**9.21**	**8.22**	**8.94**
- book holiday package	8.76	8.66	9.39	8.18	**8.79**
- do not book holiday package	10.04	10.13	8.52	8.31	**9.31**
Average daily expenditure (€)	**122.2**	**140.8**	**138.9**	**141.0**	**135.2**
- book holiday package	134.8	152.0	147.4	155.8	**147.2**
- do not book holiday package	99.0	113.2	106.2	112.2	**107.0**
Total turnover (> 15 years old) (€m)	**157**	**140**	**170**	**142**	**610**
- book holiday package	112	105	148	105	**470**
- do not book holiday package	44	35	23	37	**139**

AVERAGE LENGHT OF STAY (nights)

2018Q1	2018Q2	2018Q3	2018Q4
9.21	9.09	9.21	8.22

EXPENDITURE PER TOURIST (€)

2018Q1	2018Q2	2018Q3	2018Q4
1,066	1,168	1,238	1,094
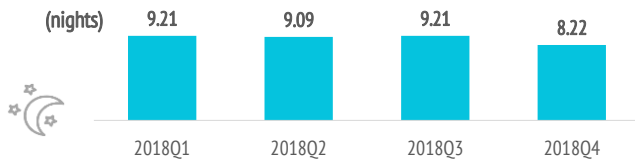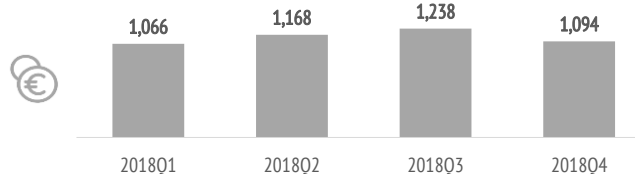
Importance of each factor in the destination choice 👥?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	82.1%	77.0%	70.0%	81.1%	**77.6%**
Tranquility	42.9%	38.0%	35.9%	41.2%	**39.6%**
Sea	30.3%	37.1%	42.8%	43.7%	**38.3%**
Accommodation supply	25.3%	34.7%	40.0%	31.6%	**32.7%**
Beaches	24.5%	31.3%	36.8%	36.6%	**32.1%**
Fun possibilities	25.3%	27.9%	38.5%	30.0%	**30.4%**
European belonging	23.8%	29.7%	21.4%	26.1%	**25.1%**
Price	22.0%	24.8%	28.0%	23.9%	**24.6%**
Safety	21.6%	27.0%	26.7%	21.9%	**24.2%**
Landscapes	21.7%	18.0%	17.2%	26.8%	**21.0%**
Exoticism	10.1%	14.6%	19.6%	13.2%	**14.3%**
Gastronomy	11.1%	14.6%	9.7%	15.2%	**12.5%**
Authenticity	12.1%	9.7%	11.7%	12.2%	**11.5%**
Effortless trip	11.7%	12.2%	9.9%	10.9%	**11.2%**
Environment	7.7%	8.9%	11.1%	10.3%	**9.5%**
Hiking trail network	14.3%	3.8%	4.1%	9.2%	**8.1%**
Nightlife	3.8%	4.1%	6.4%	4.0%	**4.6%**
Culture	4.9%	2.7%	3.8%	5.7%	**4.3%**
Historical heritage	4.3%	2.3%	3.0%	4.7%	**3.6%**
Shopping	2.8%	3.3%	4.5%	2.8%	**3.4%**

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 ACCOMMODATION SUPPLY

2018Q1	25%
2018Q2	35%
2018Q3	40%
2018Q4	32%

What is the main motivation for their holidays?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	55.6%	56.3%	50.5%	58.8%	**55.2%**
Enjoy family time	3.4%	12.3%	9.3%	9.8%	**8.5%**
Have fun	11.9%	13.5%	22.7%	14.1%	**15.6%**
Explore the destination	22.7%	14.2%	14.7%	12.6%	**16.3%**
Practice their hobbies	1.1%	1.9%	1.2%	2.0%	**1.5%**
Other reasons	5.3%	1.8%	1.7%	2.7%	**2.9%**

How far in advance do they book their trip? 📅

	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.8%	1.4%	0.8%	0.3%	**0.8%**
Between 1 and 30 days	31.7%	26.3%	28.0%	32.2%	**29.7%**
Between 1 and 2 months	30.7%	21.2%	17.6%	27.1%	**24.3%**
Between 3 and 6 months	27.6%	39.9%	35.6%	29.7%	**32.9%**
More than 6 months	9.2%	11.2%	18.0%	10.7%	**12.3%**

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

2018Q1	9.2%
2018Q2	11.2%
2018Q3	18.0%
2018Q4	10.7%

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	49.8%	43.4%	39.0%	50.7%	**45.8%**
Friends or relatives	19.1%	25.1%	25.5%	25.1%	**23.6%**
Internet or social media	62.9%	59.2%	67.2%	54.1%	**61.0%**
Mass Media	0.9%	0.9%	1.0%	0.8%	**0.9%**
Travel guides and magazines	10.3%	15.3%	13.5%	9.3%	**12.0%**
Travel Blogs or Forums	2.9%	4.1%	3.5%	3.1%	**3.4%**
Travel TV Channels	0.0%	0.1%	0.6%	0.0%	**0.2%**
Tour Operator or Travel Agency	24.6%	29.3%	28.4%	23.0%	**26.3%**
Public administrations or similar	0.0%	0.0%	0.3%	0.2%	**0.1%**
Others	0.8%	1.4%	1.3%	2.1%	**1.4%**

* Multi-choise question

With whom did they book their flight and accommodation?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	36.1%	29.5%	20.1%	30.6%	**29.2%**
- Tour Operator or Travel Agency	63.9%	70.5%	79.9%	69.4%	**70.8%**
Accommodation					
- Directly with the accommodation	27.9%	21.6%	16.8%	20.7%	**21.9%**
- Tour Operator or Travel Agency	72.1%	78.4%	83.2%	79.3%	**78.1%**

Where do they stay?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	16.1%	13.1%	10.9%	11.6%	**13.0%**
4* Hotel	30.8%	31.6%	35.1%	34.7%	**33.1%**
5* Hotel / 5* Luxury Hotel	2.0%	5.3%	2.6%	4.8%	**3.6%**
Aparthotel / Tourist Villa	30.2%	38.6%	36.7%	29.4%	**33.6%**
House/room rented in a private dwelli	5.2%	2.0%	3.6%	3.1%	**3.6%**
Private accommodation [1]	4.4%	3.4%	0.9%	5.1%	**3.4%**
Others (Cottage, cruise, camping,..)	11.3%	5.9%	10.2%	11.2%	**9.8%**

(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	35.6%	35.6%	29.5%	31.2%	**33.0%**
Bed and Breakfast	16.8%	11.8%	14.0%	13.2%	**14.1%**
Half board	16.2%	18.8%	23.0%	15.6%	**18.4%**
Full board	2.1%	0.6%	1.0%	2.1%	**1.5%**
All inclusive	29.3%	33.2%	32.6%	37.9%	**33.0%**

❞ 33% of Dutch book all inclusive.

29.3% 2018Q1	32.6% 2018Q3
33.2% 2018Q2	37.9% 2018Q4

Other expenses

	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	66.6%	68.6%	66.9%	64.1%	**66.5%**
Supermarkets	63.3%	62.7%	67.8%	62.3%	**64.1%**
Car rental	35.7%	33.0%	28.1%	37.1%	**33.5%**
Organized excursions	20.4%	25.7%	28.7%	23.7%	**24.5%**
Taxi, transfer, chauffeur service	57.6%	60.6%	67.8%	57.7%	**60.9%**
Theme Parks	5.1%	8.0%	11.6%	7.2%	**7.9%**
Sport activities	6.0%	6.4%	7.0%	9.0%	**7.1%**
Museums	7.8%	5.8%	4.6%	4.9%	**5.8%**
Flights between islands	3.6%	2.5%	3.3%	4.3%	**3.4%**

Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.2%	1.2%	1.4%	0.8%	**0.9%**
1 - 2 hours	8.8%	10.2%	11.1%	9.8%	**10.0%**
3 - 6 hours	33.5%	34.7%	38.6%	38.0%	**36.2%**
7 - 12 hours	51.4%	43.9%	37.5%	42.8%	**44.1%**
More than 12 hours	6.1%	10.0%	11.3%	8.5%	**8.9%**

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

Legend: 0 hours, More than 1 hour, More than 3 hours, More than 7 hours, More than 12 hours

	2018Q1	2018Q2	2018Q3	2018Q4
0 hours	0%	1%	1%	1%
More than 1 hour	100%	99%	99%	99%
More than 3 hours	91%	89%	87%	89%
More than 7 hours	58%	54%	49%	51%
More than 12 hours	6%	10%	11%	9%
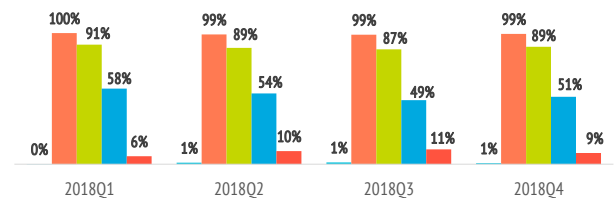
Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	76.5%	71.0%	65.7%	70.5%	**71.0%**
Beach	54.2%	63.8%	73.9%	65.9%	**64.3%**
Swimming pool, hotel facilities	46.8%	64.4%	81.0%	57.2%	**62.1%**
Explore the island on their own	50.5%	48.3%	48.7%	50.8%	**49.6%**
Organized excursions	13.6%	20.4%	29.4%	17.0%	**20.0%**
Taste Canarian gastronomy	17.6%	16.7%	14.6%	16.9%	**16.5%**
Theme parks	6.0%	12.1%	25.3%	13.1%	**14.1%**
Nature activities	16.0%	10.3%	10.2%	16.7%	**13.4%**
Sea excursions / whale watching	8.1%	11.0%	22.1%	10.5%	**12.9%**
Nightlife / concerts / shows	7.7%	9.9%	15.7%	10.8%	**11.0%**
Sport activities	9.3%	14.6%	8.4%	11.9%	**10.9%**
Activities at sea	7.4%	7.7%	14.4%	9.2%	**9.7%**
Museums / exhibitions	12.4%	9.0%	8.9%	7.5%	**9.6%**
Wineries/markets/popular festival:	6.5%	7.7%	8.6%	7.9%	**7.6%**
Astronomical observation	1.9%	5.3%	8.0%	2.9%	**4.5%**
Beauty and health treatments	4.1%	3.0%	5.8%	4.1%	**4.3%**

* Multi-choise question

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

Which island do they choose?

Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	29,137	19,262	22,854	23,857	**95,110**
Fuerteventura	14,100	11,228	11,647	13,751	**50,726**
Gran Canaria	54,087	47,033	54,665	50,957	**206,742**
Tenerife	41,921	37,377	41,839	38,311	**159,448**
La Palma	6,694	4,720	6,427	2,871	**20,712**

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	20.0%	16.1%	16.6%	18.4%	**17.9%**
Fuerteventura	9.7%	9.4%	8.5%	10.6%	**9.5%**
Gran Canaria	37.1%	39.3%	39.8%	39.3%	**38.8%**
Tenerife	28.7%	31.2%	30.4%	29.5%	**29.9%**
La Palma	4.6%	3.9%	4.7%	2.2%	**3.9%**

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	89.5%	94.5%	92.1%	92.1%	**91.9%**
Two islands	8.6%	5.0%	7.7%	7.4%	**7.3%**
Three or more islands	1.8%	0.5%	0.2%	0.5%	**0.8%**

% TOURISTS BY ISLAND AND QUARTER OF TRIP

Legend: ■ 2018Q1 ■ 2018Q2 ■ 2018Q3 ■ 2018Q4

	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
2018Q1	31%	28%	26%	26%	32%
2018Q2	20%	22%	23%	23%	23%
2018Q3	24%	23%	26%	26%	31%
2018Q4	25%	27%	25%	24%	14%
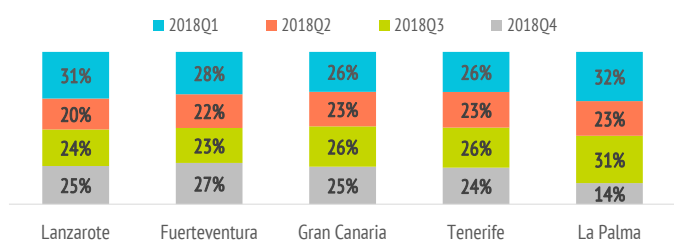
Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	15.8%	17.6%	17.1%	15.8%	**16.5%**
- Flights	14.3%	16.1%	18.7%	16.3%	**16.4%**
- Accommodation	20.4%	24.3%	21.2%	21.2%	**21.7%**
- Transport	14.9%	17.2%	18.0%	14.9%	**16.3%**
- Restaurants	20.5%	25.3%	30.0%	23.5%	**25.0%**
- Excursions	16.7%	20.9%	29.1%	21.1%	**22.3%**
- Activities	23.3%	29.3%	35.2%	23.7%	**28.2%**
Book or purchase					
- Tourist package	46.3%	40.6%	46.2%	39.8%	**43.4%**
- Flights	63.0%	61.8%	57.2%	63.3%	**61.3%**
- Accommodation	55.3%	55.9%	55.5%	54.3%	**55.3%**
- Transport	45.1%	47.4%	43.4%	48.7%	**46.0%**
- Restaurants	10.0%	9.3%	7.7%	12.3%	**9.8%**
- Excursions	5.9%	9.7%	11.7%	13.7%	**10.3%**
- Activities	8.4%	10.4%	10.9%	12.7%	**10.6%**

* Multi-choise question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	**5.0%**	**7.6%**	**4.8%**	**3.0%**	**5.0%**
Used the Internet	**95.0%**	**92.4%**	**95.2%**	**97.0%**	**95.0%**
- Own Internet connection	35.4%	40.3%	46.4%	38.9%	40.2%
- Free Wifi connection	45.2%	37.9%	34.9%	44.0%	40.6%
Applications*					
- Search for locations or maps	56.5%	58.7%	65.8%	65.2%	61.5%
- Search for destination info	45.7%	48.6%	50.4%	46.5%	47.7%
- Share pictures or trip videos	60.1%	63.6%	70.9%	64.1%	64.7%
- Download tourist apps	5.8%	8.4%	5.9%	6.6%	6.6%
- Others	28.4%	29.6%	20.3%	24.5%	25.6%

* Multi-choise question

MOST VISITED PLACES IN EACH ISLAND

LANZAROTE	FUERTEVENTURA	GRAN CANARIA
46% MONTAÑA DEL FUEGO	38% PLAYAS DE JANDÍA	53% DUNAS DE MASPALOMAS

TENERIFE	LA PALMA
50% PARQUE NACIONAL DEL TEIDE	73% SANTA CRUZ DE LA PALMA
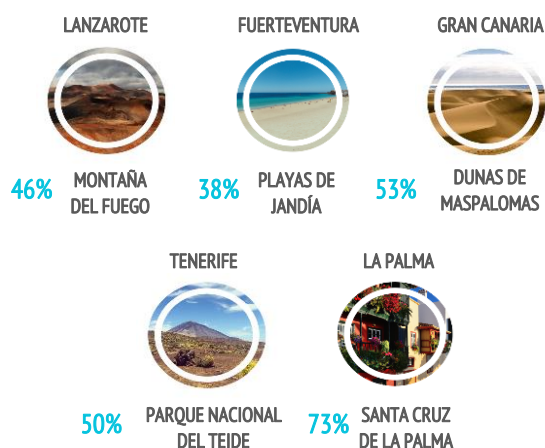
The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Average rating	8.19	8.35	8.30	8.31	**8.28**

Experience in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Worse or much worse than expected	3.6%	1.5%	2.6%	2.8%	**2.7%**
Lived up to expectations	65.1%	62.6%	53.7%	61.5%	**60.7%**
Better or much better than expected	31.3%	35.9%	43.7%	35.7%	**36.6%**

Future intentions (scale 1-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Return to the Canary Islands	8.00	8.04	7.55	7.99	**7.89**
Recommend visiting the Canary Islands	8.28	8.47	8.22	8.33	**8.32**

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	**73.4%**	**66.3%**	**58.6%**	**69.4%**	**67.0%**
Repeat tourists (last 5 years)	68.2%	59.9%	49.2%	64.4%	**60.5%**
Repeat tourists (last 5 years)(5 or more visits)	21.6%	12.8%	4.3%	16.8%	**14.0%**
At least 10 previous visits	**14.5%**	**13.3%**	**7.4%**	**20.3%**	**13.8%**

REPEAT TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4	
73.4%	66.3%	58.6%	69.4%	Average 67.0%

Canary Islands
LATITUDE OF LIFE
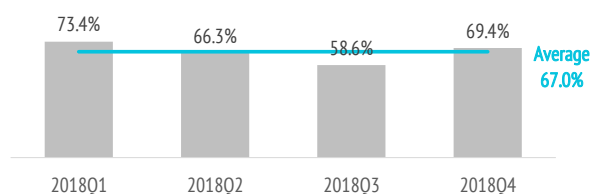
Where does the flight come from? 🌐

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Netherlands	82.4%	76.8%	87.1%	81.8%	**82.2%**
Germany	14.3%	15.1%	8.9%	13.1%	**12.8%**
Belgium	2.2%	3.4%	1.3%	1.6%	**2.1%**
Spanish Mainland	0.2%	3.0%	1.0%	2.5%	**1.6%**
United Kingdom	0.2%	0.6%	1.3%	0.3%	**0.6%**
Austria	0.4%	0.3%	0.0%	0.0%	**0.2%**
Others	0.3%	0.8%	0.5%	0.8%	**0.6%**

% TOURISTS BY QUARTER OF TRIP

- Netherlands
- Others

	2018Q1	2018Q2	2018Q3	2018Q4
Netherlands	82%	77%	87%	82%
Others	18%	23%	13%	18%
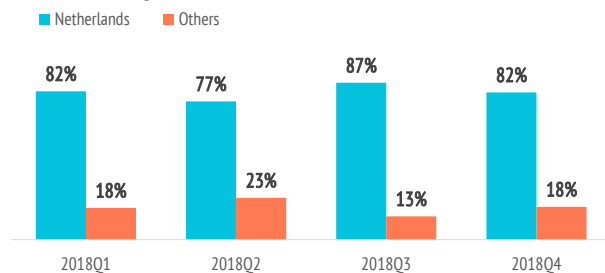
Who do they come with? 🧑‍🤝‍🧑

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	7.9%	5.4%	3.1%	7.9%	**6.1%**
Only with partner	66.2%	50.6%	49.4%	50.7%	**54.6%**
Only with children (< 13 years old)	1.3%	3.8%	5.5%	4.7%	**3.8%**
Partner + children (< 13 years old)	4.2%	9.2%	9.5%	7.2%	**7.4%**
Other relatives	7.4%	8.7%	6.6%	7.5%	**7.5%**
Friends	6.2%	7.2%	7.1%	4.8%	**6.3%**
Work colleagues	0.5%	0.2%	0.4%	0.4%	**0.4%**
Organized trip	0.0%	0.0%	0.0%	0.0%	**0.0%**
Other combinations [1]	6.3%	15.0%	18.5%	16.7%	**13.9%**

(1) Different situations have been isolated

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourists with children	**6.8%**	**19.2%**	**18.3%**	**16.4%**	**14.9%**
- Between 0 and 2 years old	1.2%	2.1%	1.1%	0.8%	**1.3%**
- Between 3 and 12 years old	5.0%	14.9%	15.6%	13.8%	**12.1%**
- Between 0 -2 and 3-12 years	0.6%	2.3%	1.6%	1.7%	**1.5%**
Tourists without children	**93.2%**	**80.8%**	**81.7%**	**83.6%**	**85.1%**
Group composition:					
- 1 person	11.3%	7.4%	4.6%	9.3%	**8.2%**
- 2 people	72.1%	58.4%	58.5%	57.9%	**62.1%**
- 3 people	4.9%	9.7%	13.6%	10.1%	**9.5%**
- 4 or 5 people	10.4%	18.1%	19.2%	18.4%	**16.4%**
- 6 or more people	1.3%	6.3%	4.1%	4.2%	**3.8%**
Average group size:	**2.23**	**2.82**	**2.75**	**2.63**	**2.59**

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14.9% of Dutch travel with children.

(under the age of 13)

2018Q1	6.8%
2018Q2	19.2%
2018Q3	18.3%
2018Q4	16.4%

Who are they? 🧍

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	51.3%	49.8%	50.5%	52.2%	**51.0%**
Women	48.7%	50.2%	49.5%	47.8%	**49.0%**
Age					
Average age (tourist > 15 years old)	52.6	46.5	39.3	48.8	**46.9**
Standard deviation	14.8	14.9	14.9	14.6	**15.6**
Age range (> 15 years old)					
16 - 24 years old	4.6%	6.8%	20.8%	5.1%	**9.4%**
25 - 30 years old	8.0%	12.6%	16.9%	11.2%	**12.1%**
31 - 45 years old	15.8%	27.2%	26.7%	20.5%	**22.3%**
46 - 60 years old	39.1%	33.8%	26.3%	38.9%	**34.6%**
Over 60 years old	32.5%	19.6%	9.2%	24.3%	**21.6%**
Occupation					
Salaried worker	40.2%	57.8%	57.3%	44.4%	**49.6%**
Self-employed	13.7%	10.1%	9.7%	12.2%	**11.5%**
Unemployed	0.8%	0.6%	0.5%	0.5%	**0.6%**
Business owner	12.0%	9.8%	9.1%	21.4%	**13.0%**
Student	1.9%	4.2%	13.6%	1.2%	**5.3%**
Retired	26.6%	16.3%	6.1%	17.9%	**16.9%**
Unpaid domestic work	1.3%	0.6%	1.9%	1.6%	**1.4%**
Others	3.5%	0.4%	1.9%	0.9%	**1.8%**
Annual household income level					
Less than €25,000	11.1%	9.0%	20.9%	8.9%	**12.6%**
€25,000 - €49,999	47.2%	39.5%	40.6%	41.1%	**42.3%**
€50,000 - €74,999	27.6%	33.3%	20.0%	29.3%	**27.3%**
More than €74,999	14.1%	18.2%	18.5%	20.7%	**17.8%**
Education level					
No studies	1.1%	1.9%	0.4%	0.3%	**0.9%**
Primary education	1.5%	1.8%	0.8%	1.7%	**1.4%**
Secondary education	50.1%	46.9%	50.5%	47.7%	**48.9%**
Higher education	47.4%	49.4%	48.3%	50.3%	**48.8%**

AVERAGE AGE (> 15 years olf)

2018Q1	52.6
2018Q2	46.5
2018Q3	39.3
2018Q4	48.8

% OF TOURISTS WITH INCOMES OVER €74,999

- 2018Q1
- 2018Q2
- 2018Q3
- 2018Q4

2018Q1	2018Q2	2018Q3	2018Q4
14%	18%	19%	21%

% SALARIED WORKED TOURISTS

2018Q1	40%
2018Q2	58%
2018Q3	57%
2018Q4	44%