Canary Islands LATITUDE OF LIFE

How many are they and how much do they spend?

TOURISTS	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourist arrivals (FRONTUR) (*)	**129.0**	**113.5**	**131.4**	**117.6**	**491.6**
Tourist arrivals > 15 years old (EGT) (*)	**115.8**	**102.7**	**115.2**	**108.7**	**442.4**
- book holiday package *(*)*	23.5	37.5	39.9	31.9	**132.9**
- do not book holiday package *(*)*	92.3	65.2	75.3	76.8	**309.5**
- % tourists who book holiday package	20.3%	36.6%	34.7%	29.3%	**30.0%**

(*) Thousand of tourists

TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4
128,966	**113,544**	**131,449**	**117,610**
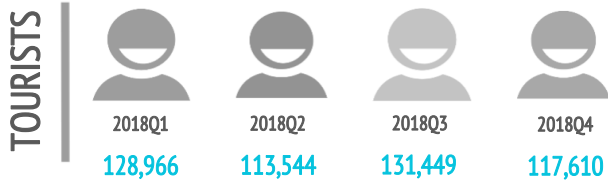
% TOURISTS WHO BOOK HOLIDAY PACKAGE

2018Q1	20%
2018Q2	37%
2018Q3	35%
2018Q4	29%
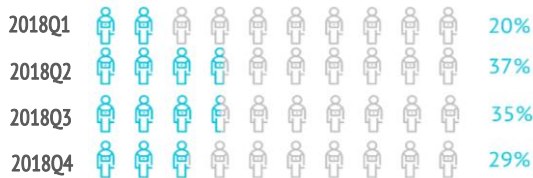
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	**978**	**1,029**	**1,207**	**839**	**1,015**
- book holiday package	1,208	1,187	1,234	978	**1,155**
- holiday package	946	998	988	783	**934**
- others	261	189	246	194	**220**
- do not book holiday package	920	937	1,192	782	**955**
- flight	244	272	335	196	**260**
- accommodation	296	285	406	243	**307**
- others	380	379	450	343	**388**
Average lenght of stay	**10.64**	**8.85**	**11.55**	**9.10**	**10.08**
- book holiday package	8.52	7.80	8.84	7.18	**8.09**
- do not book holiday package	11.18	9.46	12.99	9.90	**10.94**
Average daily expenditure (€)	**112.6**	**129.9**	**119.2**	**113.9**	**118.6**
- book holiday package	151.4	158.1	145.2	140.4	**148.8**
- do not book holiday package	102.7	113.6	105.5	102.9	**105.7**
Total turnover (> 15 years old) (€m)	**113**	**106**	**139**	**91**	**449**
- book holiday package	28	45	49	31	**153**
- do not book holiday package	85	61	90	60	**296**

AVERAGE LENGHT OF STAY (nights)

2018Q1	2018Q2	2018Q3	2018Q4
10.64	8.85	11.55	9.10

EXPENDITURE PER TOURIST (€)

2018Q1	2018Q2	2018Q3	2018Q4
978	1,029	1,207	839
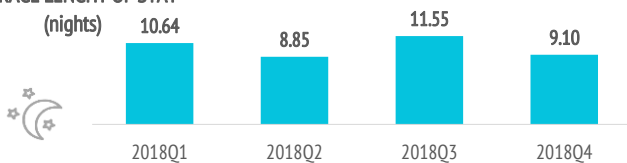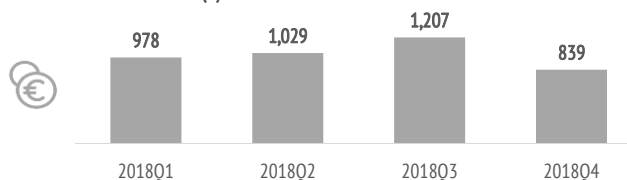
Importance of each factor in the destination choice

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	79.3%	68.7%	71.9%	82.1%	**75.6%**
Tranquility	52.1%	55.2%	53.2%	58.1%	**54.6%**
Environment	53.0%	51.4%	57.1%	52.7%	**53.7%**
Landscapes	53.2%	49.9%	55.2%	54.8%	**53.4%**
Sea	47.0%	50.5%	58.4%	47.7%	**51.0%**
Beaches	43.8%	48.7%	53.6%	46.2%	**48.1%**
Safety	46.7%	41.8%	42.2%	45.2%	**44.0%**
European belonging	43.6%	36.4%	35.7%	47.0%	**40.7%**
Price	34.5%	31.6%	33.4%	35.2%	**33.7%**
Effortless trip	35.7%	29.9%	29.2%	33.8%	**32.2%**
Accommodation supply	24.9%	33.0%	30.0%	27.1%	**28.6%**
Authenticity	23.1%	24.6%	23.7%	27.2%	**24.6%**
Fun possibilities	18.6%	17.0%	21.9%	26.0%	**20.9%**
Hiking trail network	20.7%	14.7%	20.8%	25.4%	**20.5%**
Gastronomy	16.9%	21.7%	20.9%	18.8%	**19.5%**
Shopping	14.1%	11.7%	13.9%	15.7%	**13.9%**
Exoticism	12.6%	15.1%	11.3%	10.9%	**12.4%**
Nightlife	10.1%	11.4%	13.4%	13.4%	**12.1%**
Historical heritage	8.3%	9.4%	9.7%	12.8%	**10.0%**
Culture	7.5%	8.1%	9.8%	11.7%	**9.3%**

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 BEACHES

2018Q1	2018Q3
44%	54%
2018Q2	2018Q4
49%	46%

What is the main motivation for their holidays?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	51.1%	44.1%	51.2%	51.4%	**49.6%**
Enjoy family time	9.1%	16.6%	10.5%	12.5%	**12.0%**
Have fun	9.0%	6.7%	8.2%	7.5%	**7.9%**
Explore the destination	25.0%	29.4%	25.0%	26.4%	**26.3%**
Practice their hobbies	3.7%	1.6%	2.4%	1.4%	**2.3%**
Other reasons	2.1%	1.5%	2.7%	0.9%	**1.8%**

How far in advance do they book their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.4%	0.2%	0.8%	0.4%	**0.4%**
Between 1 and 30 days	26.9%	21.3%	20.8%	22.4%	**22.9%**
Between 1 and 2 months	34.8%	31.1%	26.5%	31.3%	**30.9%**
Between 3 and 6 months	28.6%	37.4%	37.5%	37.4%	**35.1%**
More than 6 months	9.3%	10.0%	14.4%	8.5%	**10.6%**

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

2018Q1	9.3%
2018Q2	10.0%
2018Q3	14.4%
2018Q4	8.5%

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	37.1%	29.7%	28.4%	37.5%	**33.2%**
Friends or relatives	32.9%	27.8%	33.9%	29.9%	**31.2%**
Internet or social media	49.9%	55.4%	52.5%	47.2%	**51.2%**
Mass Media	2.1%	1.7%	2.2%	1.5%	**1.9%**
Travel guides and magazines	6.4%	9.0%	6.6%	8.3%	**7.5%**
Travel Blogs or Forums	5.4%	6.9%	5.0%	6.9%	**6.0%**
Travel TV Channels	0.6%	0.5%	0.9%	0.4%	**0.6%**
Tour Operator or Travel Agency	12.5%	17.6%	17.8%	14.7%	**15.6%**
Public administrations or similar	0.0%	0.3%	0.0%	0.5%	**0.2%**
Others	2.2%	2.9%	1.2%	0.0%	**1.6%**

* Multi-choise question

With whom did they book their flight and accommodation? 👁

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	70.3%	57.6%	58.5%	60.8%	**62.0%**
- Tour Operator or Travel Agency	29.7%	42.4%	41.5%	39.2%	**38.0%**
Accommodation					
- Directly with the accommodation	56.4%	43.7%	46.6%	51.4%	**49.6%**
- Tour Operator or Travel Agency	43.6%	56.3%	53.4%	48.6%	**50.4%**

Where do they stay? 🛏

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	10.0%	12.2%	14.3%	7.1%	**11.0%**
4* Hotel	25.3%	29.7%	22.8%	26.2%	**25.9%**
5* Hotel / 5* Luxury Hotel	4.2%	7.6%	4.6%	4.1%	**5.1%**
Aparthotel / Tourist Villa	25.4%	23.5%	26.0%	26.0%	**25.3%**
House/room rented in a private dwelli	14.1%	9.9%	11.8%	10.2%	**11.6%**
Private accommodation [1]	14.2%	12.5%	12.7%	15.1%	**13.6%**
Others (Cottage, cruise, camping,..)	6.8%	4.6%	7.7%	11.4%	**7.6%**

(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	50.5%	39.0%	48.0%	45.6%	**45.9%**
Bed and Breakfast	12.2%	9.8%	9.9%	15.2%	**11.8%**
Half board	17.1%	22.4%	17.1%	15.4%	**17.9%**
Full board	3.9%	5.7%	7.6%	5.4%	**5.6%**
All inclusive	16.2%	23.1%	17.5%	18.3%	**18.7%**

"

45.9% of Italians book room only.

50.5% 2018Q1

48.0% 2018Q3

39.0% 2018Q2

45.6% 2018Q4

Other expenses 📍

	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	68.4%	63.6%	67.4%	65.6%	**66.3%**
Supermarkets	63.6%	53.8%	65.1%	52.7%	**59.0%**
Car rental	41.8%	43.3%	47.8%	30.3%	**40.9%**
Organized excursions	19.9%	24.4%	27.5%	22.7%	**23.6%**
Taxi, transfer, chauffeur service	23.1%	29.4%	25.6%	21.2%	**24.8%**
Theme Parks	8.4%	7.0%	7.0%	7.7%	**7.5%**
Sport activities	5.7%	4.7%	5.3%	4.9%	**5.2%**
Museums	8.5%	7.2%	8.4%	5.8%	**7.5%**
Flights between islands	14.0%	5.0%	6.0%	8.8%	**8.6%**

Activities in the Canary Islands 🚶🛆

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.2%	0.3%	0.0%	0.0%	**0.1%**
1 - 2 hours	1.1%	4.9%	0.7%	1.0%	**1.9%**
3 - 6 hours	12.7%	10.4%	11.6%	10.3%	**11.3%**
7 - 12 hours	64.8%	61.8%	67.2%	65.0%	**64.8%**
More than 12 hours	21.1%	22.5%	20.4%	23.7%	**21.9%**

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

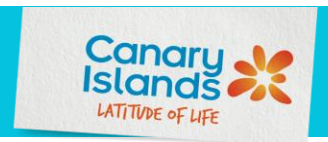■ 0 hours ■ More than 1 hour ■ More than 3 hours ■ More than 7 hours ■ More than 12 hours

	2018Q1	2018Q2	2018Q3	2018Q4
0 hours	0%	0%	0%	0%
More than 1 hour	100%	100%	100%	100%
More than 3 hours	99%	99%	99%	99%
More than 7 hours	86%	95%	88%	89%
		84%		
More than 12 hours	21%	23%	20%	24%
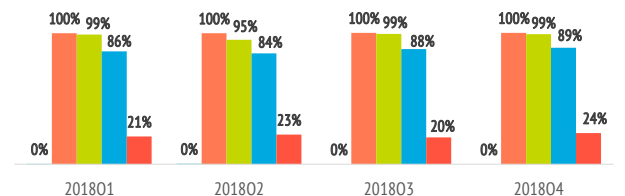
Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Beach	81.0%	85.7%	91.7%	73.5%	**83.0%**
Walk, wander	74.8%	71.6%	66.6%	68.1%	**70.3%**
Explore the island on their own	61.4%	62.2%	64.5%	56.9%	**61.3%**
Swimming pool, hotel facilities	42.4%	50.1%	47.9%	33.3%	**43.4%**
Taste Canarian gastronomy	33.2%	31.9%	29.4%	28.2%	**30.7%**
Organized excursions	15.0%	18.3%	21.1%	17.9%	**18.1%**
Nightlife / concerts / shows	16.4%	17.2%	19.2%	16.1%	**17.2%**
Wineries/markets/popular festival	16.8%	15.6%	18.1%	15.2%	**16.5%**
Theme parks	11.9%	16.3%	15.7%	15.1%	**14.7%**
Museums / exhibitions	13.9%	13.7%	13.8%	14.3%	**13.9%**
Sport activities	16.9%	12.4%	11.5%	10.3%	**12.8%**
Sea excursions / whale watching	8.1%	13.1%	13.7%	8.7%	**10.9%**
Nature activities	8.8%	7.9%	5.9%	5.8%	**7.1%**
Activities at sea	5.5%	6.6%	7.9%	5.4%	**6.3%**
Beauty and health treatments	8.1%	6.5%	4.3%	2.3%	**5.3%**
Astronomical observation	2.3%	1.8%	2.0%	1.5%	**1.9%**

* Multi-choise question

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

Canary Islands
LATITUDE OF LIFE

Which island do they choose?

Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	15,256	16,883	17,288	15,408	**64,835**
Fuerteventura	20,929	20,438	27,762	16,581	**85,710**
Gran Canaria	24,211	22,388	23,322	24,321	**94,242**
Tenerife	54,799	41,953	46,841	51,582	**195,175**
La Palma	311	773	0	548	**1,632**

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	13.2%	16.5%	15.0%	14.2%	**14.7%**
Fuerteventura	18.1%	20.0%	24.1%	15.3%	**19.4%**
Gran Canaria	21.0%	21.9%	20.2%	22.4%	**21.3%**
Tenerife	47.4%	41.0%	40.7%	47.6%	**44.2%**
La Palma	0.3%	0.8%	0.0%	0.5%	**0.4%**

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	81.3%	85.6%	85.4%	86.7%	**84.7%**
Two islands	17.3%	12.6%	12.6%	13.0%	**13.9%**
Three or more islands	1.4%	1.8%	2.0%	0.3%	**1.4%**

% TOURISTS BY ISLAND AND QUARTER OF TRIP

■ 2018Q1   ■ 2018Q2   ■ 2018Q3   ■ 2018Q4

	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
2018Q1	24%	24%	26%	28%	19%
2018Q2	26%	24%	24%	21%	47%
2018Q3	27%	32%	25%	24%	0%
2018Q4	24%	19%	26%	26%	34%

Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	6.8%	10.9%	14.4%	12.7%	**11.3%**
- Flights	6.6%	7.9%	9.3%	10.6%	**8.6%**
- Accommodation	8.9%	9.3%	11.4%	12.0%	**10.4%**
- Transport	13.1%	12.3%	20.5%	15.5%	**15.6%**
- Restaurants	28.3%	32.1%	28.9%	28.7%	**29.5%**
- Excursions	26.6%	29.7%	35.4%	33.3%	**31.3%**
- Activities	30.3%	31.6%	36.7%	34.9%	**33.4%**
Book or purchase					
- Tourist package	22.5%	21.9%	23.0%	26.1%	**23.3%**
- Flights	82.2%	76.5%	72.2%	80.1%	**77.7%**
- Accommodation	64.8%	65.6%	61.4%	67.2%	**64.6%**
- Transport	51.8%	52.7%	47.6%	54.6%	**51.4%**
- Restaurants	14.0%	10.9%	10.4%	18.0%	**13.1%**
- Excursions	12.9%	12.4%	7.0%	12.7%	**11.0%**
- Activities	11.8%	12.9%	11.1%	11.6%	**11.8%**

* Multi-choise question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	**10.6%**	**4.0%**	**3.8%**	**9.5%**	**7.0%**
Used the Internet	**89.4%**	**96.0%**	**96.2%**	**90.5%**	**93.0%**
- Own Internet connection	48.8%	54.5%	63.0%	51.1%	**54.4%**
- Free Wifi connection	26.0%	31.5%	23.0%	23.7%	**25.9%**
Applications*					
- Search for locations or maps	76.8%	72.5%	74.9%	73.8%	**74.5%**
- Search for destination info	31.1%	36.1%	33.3%	31.1%	**32.9%**
- Share pictures or trip videos	56.8%	57.3%	56.2%	57.9%	**57.0%**
- Download tourist apps	7.1%	8.9%	7.8%	9.0%	**8.2%**
- Others	11.3%	11.4%	9.7%	8.9%	**10.3%**

* Multi-choise question

● MOST VISITED PLACES IN EACH ISLAND ●

LANZAROTE
67% MONTAÑA DEL FUEGO

FUERTEVENTURA
75% COTILLO

TENERIFE
51% SANTA CRUZ DE TENERIFE

GRAN CANARIA
71% DUNAS DE MASPALOMAS

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	8.37	8.42	8.51	8.51	**8.45**

Experience in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Worse or much worse than expected	4.7%	4.1%	5.6%	4.0%	**4.6%**
Lived up to expectations	53.8%	51.9%	46.2%	48.4%	**50.1%**
Better or much better than expected	41.5%	44.0%	48.2%	47.6%	**45.3%**

Future intentions (scale 1-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Return to the Canary Islands	8.65	8.63	8.53	8.73	**8.63**
Recommend visiting the Canary Islands	8.81	8.81	8.83	8.89	**8.83**

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	**55.4%**	**46.9%**	**47.9%**	**53.6%**	**51.0%**
Repeat tourists (last 5 years)	53.3%	44.5%	43.0%	50.9%	**48.0%**
Repeat tourists (last 5 years)(5 or more visits)	12.4%	10.2%	8.1%	8.9%	**9.9%**
At least 10 previous visits	**9.9%**	**5.6%**	**4.7%**	**9.1%**	**7.4%**

REPEAT TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4	
55.4%	46.9%	47.9%	53.6%	Average 51.0%

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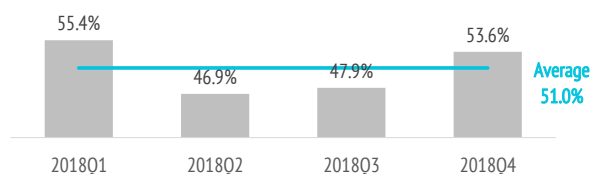
Where does the flight come from? 🌐

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Italy	81.4%	75.4%	70.0%	77.5%	**76.1%**
Spanish Mainland	16.0%	20.8%	23.8%	19.5%	**20.0%**
Germany	0.0%	1.9%	2.4%	1.4%	**1.4%**
United Kingdom	1.3%	0.6%	1.5%	0.4%	**1.0%**
Others	1.4%	1.2%	2.2%	1.2%	**1.5%**

% TOURISTS BY QUARTER OF TRIP

■ Italy ■ Others

	2018Q1	2018Q2	2018Q3	2018Q4
Italy	81%	75%	70%	77%
Others	19%	25%	30%	23%
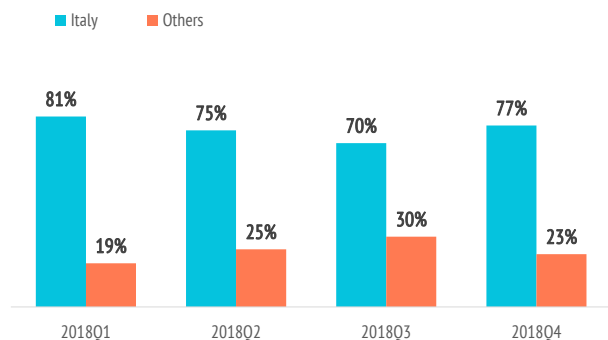
Who do they come with? 👪

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	12.2%	11.2%	10.9%	18.0%	**13.0%**
Only with partner	48.2%	44.7%	45.7%	43.2%	**45.5%**
Only with children (< 13 years old)	6.5%	8.9%	6.4%	6.5%	**7.0%**
Partner + children (< 13 years old)	3.4%	6.5%	4.8%	3.0%	**4.4%**
Other relatives	5.1%	5.5%	5.2%	5.9%	**5.4%**
Friends	12.8%	8.1%	9.8%	10.0%	**10.2%**
Work colleagues	1.2%	0.9%	0.3%	0.0%	**0.6%**
Organized trip	0.0%	0.2%	0.0%	0.4%	**0.1%**
Other combinations [1]	10.7%	14.0%	17.0%	13.0%	**13.7%**

(1) Different situations have been isolated

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourists with children	**12.9%**	**20.3%**	**13.2%**	**12.4%**	**14.6%**
- Between 0 and 2 years old	0.9%	2.1%	1.2%	2.5%	**1.6%**
- Between 3 and 12 years old	11.3%	14.4%	10.9%	9.0%	**11.4%**
- Between 0 -2 and 3-12 years	0.7%	3.8%	1.1%	0.9%	**1.6%**
Tourists without children	**87.1%**	**79.7%**	**86.8%**	**87.6%**	**85.4%**
Group composition:					
- 1 person	21.1%	17.3%	14.8%	23.3%	**19.1%**
- 2 people	54.1%	47.3%	53.5%	50.4%	**51.4%**
- 3 people	12.2%	13.8%	17.0%	11.6%	**13.7%**
- 4 or 5 people	9.9%	19.5%	12.9%	13.9%	**13.9%**
- 6 or more people	2.8%	2.1%	1.8%	0.8%	**1.9%**
Average group size:	**2.29**	**2.49**	**2.41**	**2.22**	**2.35**

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14.6% of Italians travel with children.

(under the age of 13)

2018Q1	12.9%
2018Q2	20.3%
2018Q3	13.2%
2018Q4	12.4%

Who are they? 👤

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	46.4%	52.3%	55.4%	54.0%	**52.0%**
Women	53.6%	47.7%	44.6%	46.0%	**48.0%**
Age					
Average age (tourist > 15 years old)	44.5	43.9	41.9	44.4	**43.6**
Standard deviation	14.6	13.5	15.1	14.9	**14.6**
Age range (> 15 years old)					
16 - 24 years old	7.0%	8.1%	13.6%	10.1%	**9.7%**
25 - 30 years old	14.9%	10.3%	17.2%	14.1%	**14.2%**
31 - 45 years old	31.8%	37.5%	29.8%	27.1%	**31.4%**
46 - 60 years old	30.0%	31.9%	24.5%	32.2%	**29.6%**
Over 60 years old	16.3%	12.3%	14.9%	16.5%	**15.1%**
Occupation					
Salaried worker	40.7%	43.1%	41.4%	40.0%	**41.3%**
Self-employed	21.9%	21.7%	23.2%	25.0%	**22.9%**
Unemployed	5.7%	2.4%	4.8%	5.0%	**4.5%**
Business owner	10.6%	12.0%	6.1%	9.9%	**9.6%**
Student	4.2%	7.7%	13.1%	7.7%	**8.2%**
Retired	15.6%	11.8%	9.2%	11.5%	**12.0%**
Unpaid domestic work	0.9%	0.8%	1.2%	0.6%	**0.9%**
Others	0.5%	0.3%	1.0%	0.4%	**0.6%**
Annual household income level					
Less than €25,000	34.8%	24.4%	33.3%	27.9%	**30.3%**
€25,000 - €49,999	44.4%	48.5%	45.0%	47.3%	**46.2%**
€50,000 - €74,999	12.6%	15.4%	10.6%	8.5%	**11.7%**
More than €74,999	8.2%	11.6%	11.2%	16.3%	**11.8%**
Education level					
No studies	0.6%	0.4%	1.5%	0.4%	**0.7%**
Primary education	4.1%	3.5%	2.2%	3.4%	**3.3%**
Secondary education	21.1%	16.4%	14.9%	12.6%	**16.3%**
Higher education	74.2%	79.8%	81.4%	83.6%	**79.7%**

AVERAGE AGE (> 15 years olf)

2018Q1	44.5
2018Q2	43.9
2018Q3	41.9
2018Q4	44.4

% OF TOURISTS WITH INCOMES OVER €74,999

● 2018Q1   ● 2018Q3
● 2018Q2   ● 2018Q4

2018Q1	2018Q2	2018Q3	2018Q4
8%	12%	11%	16%

% SALARIED WORKED TOURISTS

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