

TOURIST PROFILE BY SOURCE MARKETS (2018)

LA PALMA: MAIN SOURCE MARKETS

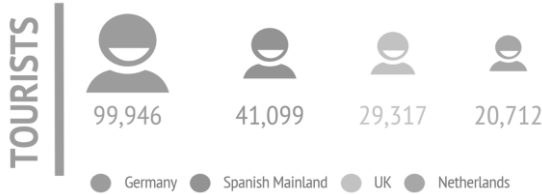


How many are they and how much do they spend?



	DE	Spain	UK	NLD	La Palma
TOURISTS					
Tourist arrivals (FRONTUR) (*)	107	44.4	33.8	24.7	274
Tourist arrivals > 15 years old (EGT) (*)	100	41.1	29.3	20.7	249
- book holiday package (*)	52.8	9.6	23.0	15.1	139
- do not book holiday package (*)	47.1	31.5	6.3	5.6	110
- % tourists who book holiday package	52.8%	23.3%	78.3%	73.0%	55.9%

(*) Thousands of tourists

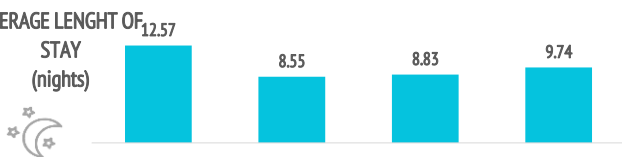


% TOURISTS WHO BOOK HOLIDAY PACKAGE

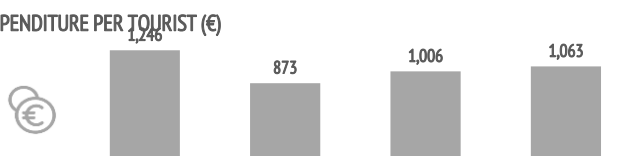


	DE	Spain	UK	NLD	La Palma
Expenditure per tourist (€)	1,246	873	1,006	1,063	1,118
- book holiday package	1,250	1,078	1,026	1,109	1,165
- holiday package	967.9	801	885	827	930
- others	282	276	142	282	235
- do not book holiday package	1,242	811	932	937	1,057
- flight	380	268	243	280	325
- accommodation	379	237	397	295	322
- others	483	306	292	362	409
Average length of stay	12.57	8.55	8.83	9.74	10.50
- book holiday package	10.15	7.21	8.40	9.24	9.05
- do not book holiday package	15.29	8.95	10.38	11.09	12.33
Average daily expenditure (€)	112.5	119.2	121.8	117.9	120.4
- book holiday package	131.4	150.7	127.2	125.3	135.2
- do not book holiday package	91.3	109.7	102.0	97.8	101.5
Total turnover (> 15 years old) (€m)	125	36	29	22	278
- book holiday package	66	10	24	17	162
- do not book holiday package	59	26	6	5	116

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

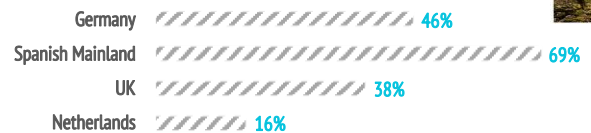


	DE	Spain	UK	NLD	La Palma
Climate	77.0%	60.8%	74.6%	61.1%	72.9%
Landscapes	79.4%	74.2%	39.7%	53.9%	67.9%
Tranquility	55.8%	57.7%	61.0%	38.2%	53.9%
Environment	46.1%	68.7%	37.6%	16.5%	46.6%
Safety	44.8%	32.8%	59.1%	16.6%	40.4%
Hiking trail network	50.3%	53.1%	15.8%	33.3%	40.2%
Sea	45.8%	35.5%	22.9%	31.7%	36.6%
Authenticity	29.6%	41.9%	22.1%	29.2%	30.1%
European belonging	33.5%	28.3%	33.3%	15.9%	29.6%
Accommodation supply	26.8%	13.2%	59.2%	18.4%	29.4%
Effortless trip	34.0%	22.0%	42.2%	8.3%	26.7%
Price	15.5%	19.6%	52.8%	17.1%	23.4%
Gastronomy	15.4%	27.9%	23.2%	12.5%	19.1%
Beaches	14.8%	21.9%	11.8%	8.7%	15.1%
Exoticism	4.8%	20.4%	8.4%	13.2%	10.3%
Fun possibilities	7.3%	11.8%	12.7%	21.9%	10.2%
Historical heritage	5.8%	11.3%	12.0%	3.7%	7.1%
Culture	2.6%	7.3%	9.9%	3.1%	4.7%
Shopping	2.9%	2.7%	4.5%	0.0%	3.5%
Nightlife	0.0%	1.8%	2.1%	1.0%	1.3%

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

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

% TOURISTS WHO CHOOSE ENVIRONMENT



What is the main motivation for their holidays?



	DE	Spain	UK	NLD	La Palma
Rest	24.0%	14.6%	65.1%	27.8%	29.7%
Enjoy family time	3.7%	17.9%	7.3%	6.5%	9.1%
Have fun	1.2%	2.5%	5.1%	12.6%	2.9%
Explore the destination	57.4%	60.8%	17.7%	41.6%	48.3%
Practice their hobbies	5.6%	3.2%	1.4%	3.8%	4.7%
Other reasons	8.1%	1.0%	3.4%	7.6%	5.4%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?



	DE	Spain	UK	NLD	La Palma
The same day	0.1%	0.6%	1.3%	0.0%	0.4%
Between 1 and 30 days	15.3%	31.9%	26.8%	18.7%	22.3%
Between 1 and 2 months	17.7%	28.7%	22.5%	27.7%	21.8%
Between 3 and 6 months	39.0%	30.6%	35.1%	40.1%	36.3%
More than 6 months	27.9%	8.1%	14.3%	13.6%	19.2%

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

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

TOURIST PROFILE BY SOURCE MARKETS (2018)

LA PALMA: MAIN SOURCE MARKETS



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

	DE	Spain	UK	NLD	La Palma
Previous visits to the Canary Islands	59.1%	38.0%	56.5%	45.7%	49.7%
Friends or relatives	29.0%	41.0%	18.2%	26.3%	29.0%
Internet or social media	61.6%	67.7%	73.4%	77.4%	65.9%
Mass Media	5.9%	1.9%	2.6%	1.6%	3.8%
Travel guides and magazines	38.1%	12.8%	14.1%	24.1%	25.7%
Travel Blogs or Forums	5.1%	14.0%	7.2%	5.4%	7.2%
Travel TV Channels	3.8%	1.0%	0.0%	1.0%	1.9%
Tour Operator or Travel Agency	24.6%	8.2%	40.3%	18.1%	24.3%
Public administrations or similar	0.3%	1.0%	0.8%	0.0%	0.6%
Others	2.6%	1.0%	1.8%	1.8%	2.2%

* Multi-choise question

With whom did they book their flight and accommodation? 👁️

	DE	Spain	UK	NLD	La Palma
Flight					
- Directly with the airline	38.5%	70.7%	24.5%	30.8%	38.6%
- Tour Operator or Travel Agency	61.5%	29.3%	75.5%	69.2%	61.4%
Accommodation					
- Directly with the accommodation	30.5%	54.9%	14.5%	22.7%	29.6%
- Tour Operator or Travel Agency	69.5%	45.1%	85.5%	77.3%	70.4%

Where do they stay? 🛏️

	DE	Spain	UK	NLD	La Palma
1-2-3* Hotel	0.0%	0.0%	0.0%	0.0%	10.3%
4* Hotel	9.7%	13.0%	7.6%	15.9%	41.2%
5* Hotel / 5* Luxury Hotel	28.1%	36.2%	73.4%	28.9%	0.0%
Aparthotel / Tourist Villa	25.6%	14.1%	9.6%	32.5%	20.3%
House/room rented in a private dwelling	13.4%	10.8%	2.5%	2.9%	9.0%
Private accommodation (1)	7.2%	17.2%	2.1%	2.4%	7.6%
Others (Cottage, cruise, camping,...)	16.0%	8.8%	4.7%	17.3%	11.6%

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

What do they book? 🍽️

	DE	Spain	UK	NLD	La Palma
Room only	48.1%	46.6%	15.6%	50.3%	38.3%
Bed and Breakfast	11.5%	19.1%	6.0%	20.5%	13.0%
Half board	34.1%	24.7%	19.4%	14.6%	25.3%
Full board	0.5%	0.0%	1.3%	0.0%	0.8%
All inclusive	5.6%	9.5%	57.6%	14.7%	22.6%

22.6% of tourists book all inclusive.



6%
Germany



58%
UK



10%
Spanish Mainland



15%
Netherlands

Other expenses 📍

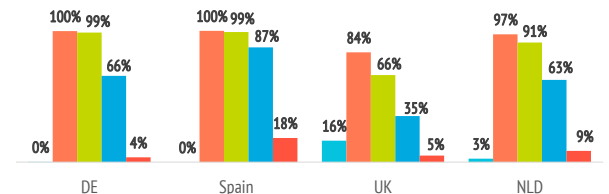
	DE	Spain	UK	NLD	La Palma
Restaurants or cafes	83.3%	84.0%	65.4%	83.6%	78.8%
Supermarkets	87.8%	73.2%	45.7%	83.8%	73.2%
Car rental	78.0%	74.2%	29.9%	75.2%	67.0%
Organized excursions	23.9%	33.4%	24.3%	26.3%	28.6%
Taxi, transfer, chauffeur service	32.1%	23.8%	58.7%	43.4%	38.7%
Theme Parks	1.3%	4.4%	0.5%	2.1%	1.6%
Sport activities	9.1%	4.9%	4.7%	7.3%	7.1%
Museums	12.9%	16.2%	9.9%	15.0%	12.5%
Flights between islands	4.0%	14.0%	2.9%	2.4%	5.6%

Activities in the Canary Islands 🚶

Outdoor time per day	DE	Spain	UK	NLD	La Palma
0 hours	0.2%	0.0%	16.4%	2.6%	2.8%
1 - 2 hours	1.1%	0.9%	17.3%	6.3%	5.4%
3 - 6 hours	32.9%	11.6%	31.2%	28.4%	27.6%
7 - 12 hours	62.1%	69.0%	30.1%	54.2%	56.3%
More than 12 hours	3.6%	18.4%	4.9%	8.5%	7.8%

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



Activities in the Canary Islands	DE	Spain	UK	NLD	La Palma
Walk, wander	88.5%	83.2%	75.3%	85.6%	82.6%
Explore the island on their own	80.0%	84.8%	45.7%	80.5%	74.8%
Beach	67.1%	58.2%	34.6%	56.3%	55.7%
Taste Canarian gastronomy	49.7%	61.6%	30.1%	27.8%	43.5%
Swimming pool, hotel facilities	22.3%	35.2%	67.4%	42.1%	39.1%
Nature activities	29.8%	50.0%	8.8%	38.8%	30.7%
Wineries / markets / popular festi	26.1%	31.6%	7.9%	9.0%	21.4%
Museums / exhibitions	21.9%	24.2%	14.9%	17.9%	20.8%
Organized excursions	12.7%	14.1%	22.2%	17.1%	18.7%
Sport activities	14.5%	16.9%	9.1%	8.3%	14.4%
Sea excursions / whale watching	15.3%	14.2%	9.6%	17.2%	14.0%
Astronomical observation	11.2%	20.7%	9.4%	13.1%	13.0%
Activities at sea	18.5%	10.9%	7.2%	10.9%	12.6%
Nightlife / concerts / shows	3.8%	5.9%	5.9%	2.2%	4.4%
Beauty and health treatments	2.7%	1.3%	7.1%	0.7%	3.7%
Theme parks	1.3%	6.7%	0.1%	5.1%	2.2%

* Multi-choise question



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Which places do they visit in Lanzarote?



	DE	Spain	UK	NLD	La Palma
Santa Cruz de La Palma (capital)	70.2%	83.7%	35.8%	63.4%	62.8%
Los Llanos de Aridane	40.9%	68.4%	21.0%	38.3%	40.7%
Puerto de Tazacorte	75.7%	91.6%	51.1%	73.3%	74.2%
Parque Nacional de la Caldera de T	77.7%	81.4%	29.0%	70.8%	65.0%
Ruta de los Volcanes (Fuencaliente)	78.6%	70.3%	26.9%	63.0%	63.4%
Observatorio astronómico del Roq	45.0%	73.2%	17.4%	35.3%	40.6%
Bosque de los Tilos	65.4%	74.0%	35.7%	59.8%	59.8%

”

7 in 10 tourists in La Palma visit
Santa Cruz de la Palma (capital of the island)



Internet usage during their trip



	DE	Spain	UK	NLD	La Palma
Research					
- Tourist package	13.7%	8.9%	17.4%	12.2%	12.5%
- Flights	12.3%	5.2%	21.1%	12.2%	11.2%
- Accommodation	21.5%	5.8%	27.4%	16.2%	16.7%
- Transport	14.6%	7.3%	18.8%	15.3%	13.2%
- Restaurants	34.0%	36.1%	23.9%	32.5%	30.2%
- Excursions	36.3%	33.8%	24.7%	19.6%	30.8%
- Activities	39.2%	38.6%	32.9%	34.1%	35.9%
Book or purchase					
- Tourist package	33.0%	15.8%	56.9%	57.9%	38.7%
- Flights	60.2%	80.3%	55.0%	73.1%	66.1%
- Accommodation	48.9%	69.3%	48.2%	68.8%	56.7%
- Transport	48.6%	64.9%	40.1%	61.5%	52.8%
- Restaurants	5.7%	12.1%	11.2%	14.9%	10.1%
- Excursions	8.9%	16.5%	9.5%	9.3%	11.5%
- Activities	10.1%	14.0%	9.3%	13.4%	11.7%

* Multi-choice question

Internet usage in the Canary Islands	DE	Spain	UK	NLD	La Palma
Did not use the Internet	8.7%	7.9%	9.6%	2.3%	9.3%
Used the Internet	91.3%	92.1%	90.4%	97.7%	90.7%
- Own Internet connection	33.1%	58.2%	34.1%	45.9%	40.0%
- Free Wifi connection	52.1%	22.8%	43.9%	38.4%	41.8%
Applications*					
- Search for locations or maps	73.3%	79.4%	50.8%	75.4%	70.6%
- Search for destination info	55.4%	51.8%	39.5%	58.9%	51.1%
- Share pictures or trip videos	50.7%	64.2%	57.1%	75.8%	57.4%
- Download tourist apps	6.7%	5.9%	4.6%	7.5%	5.9%
- Others	18.3%	11.5%	39.7%	32.5%	23.2%

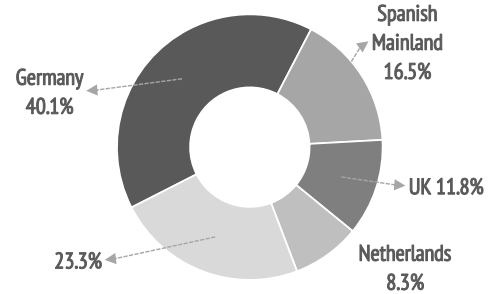
* Multi-choice question

How many islands do they visit during their trip?



	DE	Spain	UK	NLD	La Palma
One island	92.1%	75.0%	95.9%	94.5%	89.5%
Two islands	6.2%	18.0%	2.7%	5.5%	8.2%
Three or more islands	1.7%	7.0%	1.5%	0.0%	2.3%

SHARE OF TOURISTS BY SOURCE MARKET



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	DE	Spain	UK	NLD	La Palma
Average rating	8.79	8.86	8.94	8.52	8.75

Experience in the Canary Islands	DE	Spain	UK	NLD	La Palma
Worse or much worse than expected	0.9%	1.6%	2.8%	2.6%	1.7%
Lived up to expectations	57.6%	53.9%	50.7%	53.2%	54.6%
Better or much better than expected	41.5%	44.5%	46.4%	44.2%	43.7%

Future intentions (scale 1-10)	DE	Spain	UK	NLD	La Palma
Return to the Canary Islands	8.90	9.15	9.09	8.37	8.85
Recommend visiting the Canary Islands	9.24	9.37	9.33	8.89	9.16

How many are loyal to the Canary Islands?



	DE	Spain	UK	NLD	La Palma
La Palma: Repeat tourists	75.1%	72.9%	65.6%	52.6%	67.6%
La Palma: At least 10 previous visits	7.6%	6.9%	1.7%	2.6%	5.2%
Canary Islands: Repeat tourists	82.7%	84.1%	80.9%	73.8%	78.9%
Canary Islands: At least 10 previous visits	18.5%	15.0%	14.1%	11.9%	15.1%

TOP 5: % REPEAT TOURISTS BY MARKETS

Germany	75%
Spanish Mainland	73%
Austria	71%
Nordics	69%
Ireland	69%



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Where does the flight come from?



	DE	Spain	UK	NLD	La Palma
Germany	84.5%	0.0%	0.0%	2.1%	44.4%
Spanish Mainland	14.7%	100%	1.1%	3.0%	29.7%
United Kingdom	0.1%	0.0%	98.0%	0.3%	15.1%
Netherlands	0.2%	0.0%	0.0%	93.4%	10.2%
Switzerland	0.4%	0.0%	0.0%	0.0%	0.2%
Sweden	0.0%	0.0%	0.9%	0.0%	0.1%
Belgium	0.0%	0.0%	0.0%	1.2%	0.1%
Others	0.0%	0.7%	0.0%	0.0%	0.2%

Who do they come with?



	DE	Spain	UK	NLD	La Palma
Unaccompanied	7.0%	14.6%	3.8%	2.9%	8.1%
Only with partner	64.9%	50.9%	52.9%	59.3%	58.3%
Only with children (< 13 years old)	1.8%	3.8%	6.8%	3.0%	3.4%
Partner + children (< 13 years old)	5.2%	6.5%	8.3%	11.2%	7.0%
Other relatives	3.3%	5.8%	11.7%	5.9%	5.2%
Friends	5.4%	3.5%	3.5%	1.3%	3.9%
Work colleagues	0.2%	0.5%	0.0%	1.1%	0.3%
Organized trip	0.2%	0.1%	1.4%	0.0%	0.5%
Other combinations (1)	11.9%	14.3%	11.5%	15.3%	13.2%

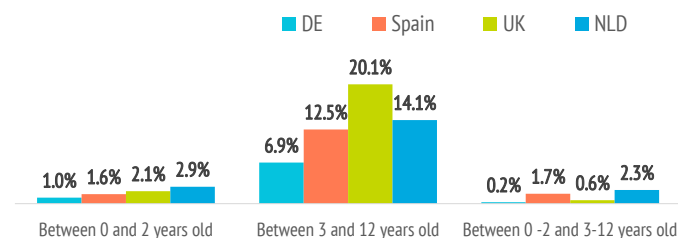
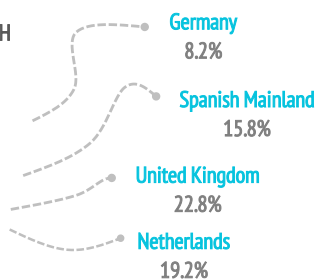
(1) Different situations have been isolated

	DE	Spain	UK	NLD	La Palma
Tourists with children	8.2%	15.8%	22.8%	19.2%	14.0%
- Between 0 and 2 years old	1.0%	1.6%	2.1%	2.9%	1.4%
- Between 3 and 12 years old	6.9%	12.5%	20.1%	14.1%	11.8%
- Between 0-2 and 3-12 years old	0.2%	1.7%	0.6%	2.3%	0.8%
Tourists without children	91.8%	84.2%	77.2%	80.8%	86.0%
Group composition:					
- 1 person	9.3%	15.5%	6.6%	6.5%	10.8%
- 2 people	71.5%	54.6%	60.5%	63.8%	63.1%
- 3 people	8.4%	10.4%	11.4%	8.9%	10.0%
- 4 or 5 people	8.8%	18.1%	16.6%	16.4%	13.4%
- 6 or more people	2.0%	1.4%	4.9%	4.3%	2.7%
Average group size:	2.26	2.45	2.64	2.76	2.43

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
La Palma: 14.0%



Who are they?



	DE	Spain	UK	NLD	La Palma
Gender					
Men	45.6%	52.5%	39.7%	45.3%	45.8%
Women	54.4%	47.5%	60.3%	54.7%	54.2%
Age					
Average age (tourist > 15 years old)	52.3	45.0	50.5	49.3	50.2
Standard deviation	13.6	12.3	15.0	14.4	14.0
Age range (> 15 years old)					
16 - 24 years old	3.1%	6.9%	6.5%	4.7%	4.4%
25 - 30 years old	5.5%	5.3%	6.0%	7.7%	5.9%
31 - 45 years old	18.1%	39.1%	24.4%	26.9%	25.1%
46 - 60 years old	45.7%	38.1%	28.4%	37.1%	39.4%
Over 60 years old	27.6%	10.5%	34.6%	23.5%	25.2%
Occupation					
Salaried worker	53.1%	58.9%	55.4%	49.1%	53.3%
Self-employed	11.2%	12.7%	12.0%	14.5%	11.6%
Unemployed	0.1%	2.1%	0.1%	0.0%	0.7%
Business owner	11.0%	9.4%	2.3%	9.0%	9.2%
Student	3.6%	6.2%	2.2%	2.2%	4.4%
Retired	18.3%	9.6%	27.2%	23.9%	19.2%
Unpaid domestic work	0.7%	0.9%	0.0%	0.7%	0.6%
Others	2.0%	0.2%	0.7%	0.6%	1.0%
Annual household income level					
Less than €25,000	8.0%	24.5%	12.4%	4.1%	12.1%
€25,000 - €49,999	34.7%	43.5%	35.6%	44.7%	37.2%
€50,000 - €74,999	31.5%	18.9%	27.7%	28.0%	28.2%
More than €74,999	25.7%	13.1%	24.4%	23.1%	22.5%
Education level					
No studies	0.4%	0.6%	12.8%	0.5%	1.9%
Primary education	1.7%	4.0%	1.6%	0.0%	2.3%
Secondary education	18.9%	20.3%	16.9%	34.6%	20.4%
Higher education	79.0%	75.1%	68.7%	64.9%	75.4%



AVERAGE AGE
(> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999

Germany (26%)
Spain (13%)
UK (24%)
Netherlands (23%)



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



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

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