

TOURIST PROFILE BY SOURCE MARKETS (2019)

LA PALMA: MAIN SOURCE MARKETS

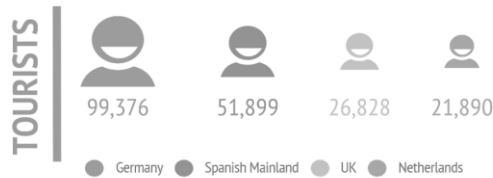


How many are they and how much do they spend?



	DE	Spain	UK	NLD	La Palma
TOURISTS					
Tourist arrivals (FRONTUR) (*)	99.4	51.9	26.8	21.9	258
Tourist arrivals > 15 years old (EGT) (*)	92.9	47.4	23.9	20.2	235
- book holiday package (*)	49.4	13.2	18.9	15.6	127
- do not book holiday package (*)	43.6	34.2	5.03	4.65	108
- % tourists who book holiday package	53.1%	27.8%	79.0%	77.0%	54.1%

(*) Thousands of tourists

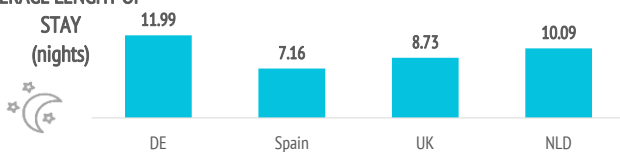


% TOURISTS WHO BOOK HOLIDAY PACKAGE

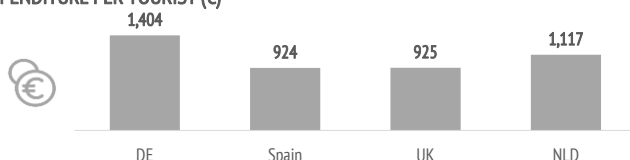


	DE	Spain	UK	NLD	La Palma
Expenditure per tourist (€)	1,404	924	925	1,117	1,205
- book holiday package	1,299	1,067	939	1,113	1,197
- holiday package	994	827	817	848	949
- others	305	240	122	265	249
- do not book holiday package	1,523	869	875	1,133	1,213
- flight	388	276	212	332	329
- accommodation	406	283	309	374	372
- others	728	310	354	428	513
Average length of stay	11.99	7.16	8.73	10.09	10.42
- book holiday package	10.92	6.49	8.68	9.33	9.48
- do not book holiday package	13.19	7.42	8.90	12.64	11.53
Average daily expenditure (€)	136.8	138.9	107.2	120.2	131.4
- book holiday package	127.0	168.3	107.8	126.8	133.5
- do not book holiday package	147.9	127.5	104.9	98.0	128.9
Total turnover (> 15 years old) (€m)	130	44	22	23	284
- book holiday package	64	14	18	17	153
- do not book holiday package	66	30	4	5	131

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	DE	Spain	UK	NLD	La Palma
Climate	74.1%	53.9%	74.7%	70.8%	69.8%
Landscapes	74.4%	76.5%	41.8%	54.8%	67.4%
Tranquility	57.5%	55.9%	55.9%	49.2%	54.8%
Environment	50.5%	70.8%	45.3%	8.7%	50.2%
Safety	47.6%	35.0%	57.7%	19.6%	42.6%
Hiking trail network	45.4%	48.6%	15.2%	32.0%	38.9%
Sea	46.5%	36.4%	19.4%	28.4%	38.8%
European belonging	34.2%	27.9%	28.4%	18.3%	30.5%
Authenticity	28.8%	38.6%	23.7%	23.2%	29.9%
Accommodation supply	27.9%	14.8%	57.6%	25.2%	28.4%
Effortless trip	36.5%	17.3%	36.9%	7.8%	26.2%
Price	16.7%	20.1%	54.9%	13.1%	23.3%
Gastronomy	17.5%	28.8%	16.4%	6.0%	18.9%
Beaches	14.3%	18.9%	7.8%	7.8%	14.6%
Fun possibilities	8.2%	10.9%	9.9%	24.2%	11.1%
Exoticism	5.6%	16.1%	5.2%	15.1%	10.7%
Historical heritage	8.0%	10.0%	6.1%	5.1%	7.9%
Culture	5.9%	6.0%	8.9%	2.2%	5.5%
Shopping	3.8%	1.9%	2.6%	0.2%	3.3%
Nightlife	0.3%	4.1%	0.2%	0.0%	1.2%

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	25.5%	19.0%	66.4%	40.9%	31.8%
Enjoy family time	4.3%	12.5%	9.4%	2.9%	7.6%
Have fun	1.9%	4.7%	2.2%	6.7%	3.2%
Explore the destination	58.6%	54.9%	20.2%	40.8%	49.7%
Practice their hobbies	3.0%	6.5%	0.6%	2.5%	3.4%
Other reasons	6.7%	2.4%	1.2%	6.3%	4.2%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?



	DE	Spain	UK	NLD	La Palma
The same day	0.4%	0.7%	0.0%	0.2%	0.6%
Between 1 and 30 days	16.3%	29.9%	26.3%	30.6%	24.3%
Between 1 and 2 months	15.4%	27.8%	25.4%	25.7%	21.4%
Between 3 and 6 months	40.9%	34.4%	30.5%	38.6%	35.9%
More than 6 months	26.9%	7.3%	17.7%	5.0%	17.8%

Source: Encuesta sobre el Gasto Turístico (ISTAC). 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 (2019)

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

	DE	Spain	UK	NLD	La Palma
Previous visits to the Canary Islands	63.4%	42.1%	60.8%	38.3%	53.4%
Friends or relatives	26.5%	34.5%	18.2%	21.9%	24.7%
Internet or social media	56.6%	63.7%	74.0%	78.5%	64.5%
Mass Media	7.1%	1.5%	3.2%	0.0%	4.2%
Travel guides and magazines	37.4%	16.5%	10.1%	19.5%	25.1%
Travel Blogs or Forums	7.8%	14.4%	10.0%	7.3%	9.6%
Travel TV Channels	3.8%	1.6%	0.0%	1.2%	2.1%
Tour Operator or Travel Agency	25.1%	16.3%	42.1%	23.5%	25.0%
Public administrations or similar	0.2%	0.7%	2.4%	0.3%	0.7%
Others	1.5%	1.4%	2.5%	0.0%	1.3%

* Multi-choice question

With whom did they book their flight and accommodation? 🗣️

	DE	Spain	UK	NLD	La Palma
Flight					
- Directly with the airline	40.7%	62.4%	21.4%	25.0%	40.5%
- Tour Operator or Travel Agency	59.3%	37.6%	78.6%	75.0%	59.5%
Accommodation					
- Directly with the accommodation	30.2%	53.3%	15.5%	20.5%	31.7%
- Tour Operator or Travel Agency	69.8%	46.7%	84.5%	79.5%	68.3%

Where do they stay? 🛏️

	DE	Spain	UK	NLD	La Palma
1-2-3* Hotel	6.6%	9.6%	4.9%	27.1%	9.1%
4* Hotel	33.4%	50.8%	80.4%	37.6%	47.3%
5* Hotel / 5* Luxury Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
Aparthotel / Tourist Villa	28.0%	15.1%	5.9%	19.5%	19.3%
House/room rented in a private dwelling	11.4%	7.0%	2.8%	4.3%	8.6%
Private accommodation (1)	6.8%	11.1%	3.4%	1.8%	6.5%
Others (Cottage, cruise, camping,...)	13.8%	6.4%	2.7%	9.8%	9.1%

(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	44.4%	39.2%	13.1%	43.8%	36.2%
Bed and Breakfast	12.7%	11.9%	4.6%	18.1%	11.7%
Half board	33.4%	35.7%	13.8%	19.0%	27.2%
Full board	0.3%	0.7%	0.3%	0.8%	0.7%
All inclusive	9.2%	12.5%	68.2%	18.2%	24.1%



36.2% of tourists book room only.



44%
Germany



13%
UK



39%
Spanish Mainland



44%
Netherlands

Other expenses 📍

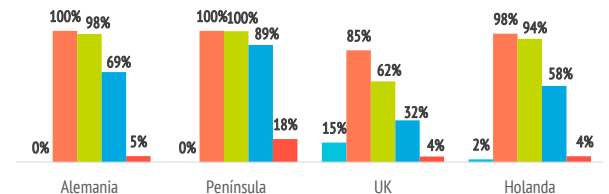
	DE	Spain	UK	NLD	La Palma
Restaurants or cafes	80.9%	83.2%	57.0%	77.7%	76.0%
Supermarkets	83.0%	64.7%	43.8%	84.4%	71.4%
Car rental	71.1%	75.6%	28.3%	72.6%	64.6%
Organized excursions	30.1%	28.9%	27.0%	37.8%	30.0%
Taxi, transfer, chauffeur service	33.2%	24.6%	59.2%	27.7%	34.6%
Theme Parks	2.0%	4.0%	1.7%	3.8%	2.2%
Sport activities	6.5%	5.3%	4.1%	9.6%	5.6%
Museums	16.2%	14.3%	9.1%	17.7%	14.6%
Flights between islands	4.3%	7.2%	3.4%	2.3%	5.0%

Activities in the Canary Islands 🚶

Outdoor time per day	DE	Spain	UK	NLD	La Palma
0 hours	0.0%	0.0%	14.9%	2.1%	2.7%
1 - 2 hours	2.3%	0.3%	23.6%	4.0%	5.2%
3 - 6 hours	29.2%	10.4%	29.7%	35.8%	26.9%
7 - 12 hours	64.0%	71.7%	27.6%	53.6%	57.1%
More than 12 hours	4.6%	17.6%	4.2%	4.4%	8.1%

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	85.0%	77.2%	69.5%	85.8%	79.3%
Explore the island on their own	78.3%	80.9%	49.8%	80.0%	75.4%
Beach	67.4%	62.0%	37.2%	47.9%	58.3%
Swimming pool, hotel facilities	26.7%	45.4%	69.0%	57.6%	43.3%
Taste Canarian gastronomy	48.3%	51.5%	18.0%	30.9%	39.3%
Nature activities	31.6%	47.6%	12.3%	47.2%	35.1%
Museums / exhibitions	22.6%	21.7%	19.2%	26.0%	22.1%
Wineries / markets / popular festi	22.9%	21.8%	11.9%	12.6%	18.4%
Organized excursions	16.4%	13.3%	20.3%	22.6%	17.5%
Astronomical observation	17.7%	17.1%	12.7%	14.7%	15.4%
Activities at sea	22.1%	10.2%	3.7%	10.3%	15.0%
Sea excursions / whale watching	15.8%	12.2%	14.6%	18.2%	14.9%
Sport activities	10.6%	19.9%	7.0%	12.2%	14.6%
Nightlife / concerts / shows	3.1%	8.6%	8.0%	2.3%	4.6%
Beauty and health treatments	3.4%	1.4%	6.6%	1.3%	3.6%
Theme parks	1.1%	2.5%	0.5%	7.8%	1.8%

* Multi-choice question



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LA PALMA: MAIN SOURCE MARKETS

Which places do they visit in Lanzarote?



	DE	Spain	UK	NLD	La Palma
Santa Cruz de La Palma (capital)	71.7%	87.5%	51.1%	77.7%	72.6%
Puerto de Tzacorte	73.5%	72.1%	29.8%	63.3%	63.1%
Los Llanos de Aridane	76.0%	68.3%	24.2%	61.8%	62.6%
Parque Nacional de la Caldera de T	68.2%	80.9%	31.9%	61.3%	62.1%
Ruta de los Volcanes (Fuencaliente)	57.5%	72.4%	33.9%	51.9%	56.3%
Observatorio astronómico del Roq	48.1%	71.6%	23.3%	42.2%	47.5%
Bosque de Los Tilos	38.9%	71.0%	19.4%	36.8%	41.2%

”

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	11.1%	7.9%	18.2%	15.1%	11.4%
- Flights	9.8%	9.4%	20.8%	15.9%	10.8%
- Accommodation	15.1%	11.9%	24.5%	22.3%	14.9%
- Transport	18.3%	11.9%	21.5%	13.5%	15.4%
- Restaurants	30.1%	43.1%	34.0%	30.6%	32.1%
- Excursions	33.7%	44.4%	30.9%	33.9%	36.0%
- Activities	36.5%	45.4%	40.0%	37.6%	39.4%
Book or purchase					
- Tourist package	32.7%	22.4%	60.5%	59.7%	37.9%
- Flights	62.0%	78.2%	54.7%	65.9%	68.3%
- Accommodation	54.4%	69.2%	50.6%	67.2%	61.9%
- Transport	47.7%	65.3%	41.1%	59.4%	54.3%
- Restaurants	9.6%	13.5%	7.0%	12.4%	11.2%
- Excursions	13.7%	21.8%	12.1%	21.5%	15.9%
- Activities	12.2%	15.7%	12.6%	18.8%	13.4%

* Multi-choice question

Internet usage in the Canary Islands	DE	Spain	UK	NLD	La Palma
Did not use the Internet	8.9%	3.4%	12.1%	1.9%	6.7%
Used the Internet	91.1%	96.6%	87.9%	98.1%	93.3%
- Own Internet connection	31.4%	61.8%	36.5%	43.6%	41.7%
- Free Wifi connection	48.6%	22.2%	42.6%	37.0%	39.9%
Applications*					
- Search for locations or maps	77.5%	82.0%	45.5%	79.8%	75.2%
- Search for destination info	59.1%	51.4%	41.3%	67.2%	56.1%
- Share pictures or trip videos	48.4%	58.2%	64.3%	69.0%	54.5%
- Download tourist apps	6.3%	5.6%	2.9%	11.4%	6.4%
- Others	17.3%	10.6%	32.2%	21.2%	19.2%

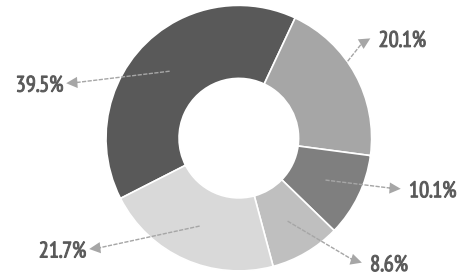
* Multi-choice question

How many islands do they visit during their trip?



	DE	Spain	UK	NLD	La Palma
One island	93.3%	80.8%	95.1%	93.7%	90.3%
Two islands	4.6%	14.0%	4.6%	5.2%	6.9%
Three or more islands	2.1%	5.2%	0.3%	1.1%	2.8%

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	8.81	8.95	9.05	8.59	8.84

Experience in the Canary Islands	DE	Spain	UK	NLD	La Palma
Worse or much worse than expected	0.8%	2.8%	0.8%	3.1%	1.9%
Lived up to expectations	54.9%	47.2%	51.2%	52.0%	51.5%
Better or much better than expected	44.3%	50.0%	48.0%	44.9%	46.6%

Future intentions (scale 1-10)	DE	Spain	UK	NLD	La Palma
Return to the Canary Islands	8.87	9.13	9.18	8.12	8.86
Recommend visiting the Canary Islands	9.27	9.34	9.37	8.65	9.20

How many are loyal to the Canary Islands?



	DE	Spain	UK	NLD	La Palma
La Palma: Repeat tourists	73.1%	66.9%	64.7%	72.8%	69.7%
La Palma: At least 10 previous visits	5.4%	5.1%	3.4%	6.3%	5.1%
Canary Islands: Repeat tourists	83.6%	80.7%	71.9%	83.7%	80.3%
Canary Islands: At least 10 previous visits	18.7%	21.5%	12.4%	23.9%	19.3%

TOP 5: % REPEAT TOURISTS BY MARKETS

Nordics	78%
Germany	76%
Spanish M.	71%
UK	66%
Belgium	54%



TOURIST PROFILE BY SOURCE MARKETS (2019)

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Where does the flight come from?



	DE	Spain	UK	NLD	La Palma
Germany	84.0%	0.0%	0.0%	3.2%	34.1%
Spanish Mainland	13.9%	100.0%	2.6%	5.5%	30.6%
United Kingdom	0.0%	0.0%	97.4%	0.0%	10.1%
Netherlands	0.0%	0.0%	0.0%	90.5%	8.4%
Switzerland	2.0%	0.0%	0.0%	0.0%	3.8%
Denmark	0.0%	0.0%	0.0%	0.0%	3.0%
Sweden	0.0%	0.0%	0.0%	0.0%	2.7%
Belgium	0.2%	0.0%	0.0%	0.8%	2.6%
France	0.0%	0.0%	0.0%	0.0%	2.1%
Poland	0.0%	0.0%	0.0%	0.0%	1.9%
Portugal	0.0%	0.0%	0.0%	0.0%	0.2%
Estonia	0.0%	0.0%	0.0%	0.0%	0.1%
Czech Republic	0.0%	0.0%	0.0%	0.0%	0.1%
Others	0.0%	0.0%	0.0%	0.0%	0.4%

Who do they come with?



	DE	Spain	UK	NLD	La Palma
Unaccompanied	10.2%	11.2%	3.7%	5.8%	9.4%
Only with partner	61.9%	52.5%	66.7%	65.6%	58.2%
Only with children (< 13 years old)	2.2%	4.8%	2.4%	2.9%	3.4%
Partner + children (< 13 years old)	4.4%	7.8%	6.9%	6.7%	5.7%
Other relatives	3.5%	4.8%	8.2%	6.2%	5.0%
Friends	5.4%	6.9%	2.9%	2.3%	5.0%
Work colleagues	0.1%	0.8%	0.0%	0.0%	0.4%
Organized trip	0.7%	0.3%	0.7%	0.0%	0.4%
Other combinations (1)	11.6%	11.0%	8.5%	10.5%	12.5%

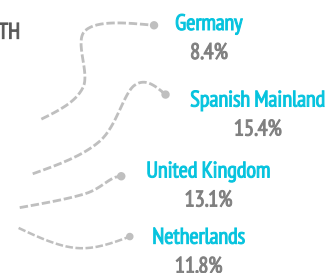
(1) Different situations have been isolated

Tourists with children	8.4%	15.4%	13.1%	11.8%	11.9%
- Between 0 and 2 years old	0.2%	1.3%	1.6%	1.5%	0.7%
- Between 3 and 12 years old	7.8%	13.8%	11.0%	10.0%	10.8%
- Between 0 -2 and 3-12 years old	0.4%	0.3%	0.5%	0.3%	0.4%
Tourists without children	91.6%	84.6%	86.9%	88.2%	88.1%
Group composition:					
- 1 person	12.6%	15.6%	5.3%	8.0%	12.5%
- 2 people	68.1%	56.5%	71.9%	68.5%	63.8%
- 3 people	10.0%	11.0%	9.6%	13.7%	11.4%
- 4 or 5 people	8.5%	14.1%	10.9%	9.3%	11.0%
- 6 or more people	0.8%	2.8%	2.3%	0.5%	1.4%
Average group size:	2.19	2.40	2.43	2.29	2.30

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
(La Palma: 11.9%)



Who are they?



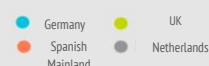
	DE	Spain	UK	NLD	La Palma
Gender					
Men	55.0%	53.1%	47.2%	47.6%	52.5%
Women	45.0%	46.9%	52.8%	52.4%	47.5%
Age					
Average age (tourist > 15 years old)	54.1	47.0	52.1	51.6	51.5
Standard deviation	13.4	12.9	14.9	13.6	13.9
Age range (> 15 years old)					
16 - 24 years old	2.0%	6.2%	3.4%	1.7%	3.2%
25 - 30 years old	4.0%	6.4%	7.0%	8.8%	6.0%
31 - 45 years old	16.6%	29.7%	20.0%	20.0%	22.1%
46 - 60 years old	45.2%	42.4%	34.6%	40.1%	40.9%
Over 60 years old	32.2%	15.4%	35.0%	29.4%	27.7%
Occupation					
Salaried worker	51.8%	64.7%	45.8%	58.5%	54.6%
Self-employed	10.2%	11.5%	12.0%	11.5%	10.6%
Unemployed	0.2%	2.0%	0.9%	0.7%	1.1%
Business owner	11.8%	6.5%	3.3%	5.7%	9.7%
Student	2.2%	4.9%	2.1%	2.1%	2.7%
Retired	23.1%	9.5%	34.2%	19.9%	20.4%
Unpaid domestic work	0.2%	0.9%	1.0%	1.0%	0.4%
Others	0.4%	0.0%	0.6%	0.7%	0.4%
Annual household income level					
Less than €25,000	8.8%	17.4%	15.5%	8.6%	11.4%
€25,000 - €49,999	33.7%	40.3%	40.1%	37.5%	36.5%
€50,000 - €74,999	29.5%	23.2%	19.4%	30.8%	26.7%
More than €74,999	28.0%	19.1%	25.1%	23.0%	25.4%
Education level					
No studies	0.0%	0.0%	0.0%	0.0%	0.0%
Primary education	3.0%	2.4%	0.2%	0.0%	3.1%
Secondary education	20.5%	18.8%	17.7%	34.5%	20.7%
Higher education	76.5%	78.3%	75.1%	65.3%	75.2%



AVERAGE AGE
(> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC). 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.