Canary Islands — LATITUDE OF LIFE

How many are they and how much do they spend?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR) (*)	**0.33**	**0.43**	**0.61**	**0.37**	**1.74**
Tourist arrivals > 15 years old (EGT) (*)	**0.31**	**0.40**	**0.50**	**0.33**	**1.54**
- book holiday package (*)	0.08	0.15	0.19	0.10	**0.52**
- do not book holiday package (*)	0.23	0.24	0.32	0.24	**1.03**
- % tourists who book holiday package	26.0%	38.6%	37.2%	28.6%	**33.5%**

(*) Million of tourists

TOURISTS

2018Q1	2018Q2	2018Q3	2018Q4
330,908	430,694	608,012	365,758
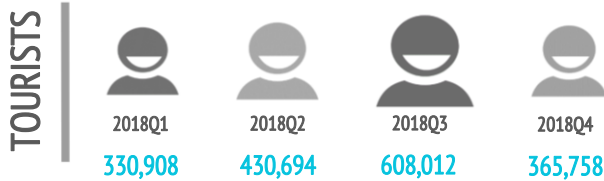
% TOURISTS WHO BOOK HOLIDAY PACKAGE

2018Q1	26%
2018Q2	39%
2018Q3	37%
2018Q4	29%
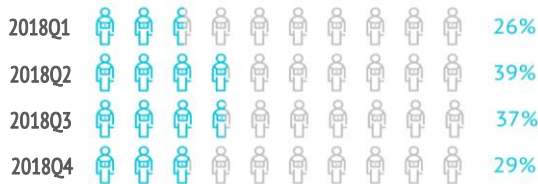
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	**744**	**842**	**1,063**	**826**	**891**
- book holiday package	933	996	1,235	1,155	**1,102**
- holiday package	700	757	973	891	**851**
- others	233	238	262	264	**251**
- do not book holiday package	677	745	961	694	**784**
- flight	177	212	266	200	**218**
- accommodation	202	252	309	202	**247**
- others	297	281	386	292	**320**
Average lenght of stay	**7.03**	**6.69**	**8.57**	**7.05**	**7.45**
- book holiday package	6.56	7.04	7.23	6.57	**6.95**
- do not book holiday package	7.19	6.46	9.36	7.24	**7.70**
Average daily expenditure (€)	**125.8**	**138.8**	**146.9**	**134.1**	**137.8**
- book holiday package	156.8	154.8	178.6	188.8	**170.0**
- do not book holiday package	114.9	128.7	128.1	112.2	**121.6**
Total turnover (> 15 years old) (€m)	**231**	**334**	**535**	**277**	**1,376**
- book holiday package	75	152	231	111	**570**
- do not book holiday package	155	181	304	166	**806**

AVERAGE LENGHT OF STAY (nights)

2018Q1	2018Q2	2018Q3	2018Q4
7.03	6.69	8.57	7.05

EXPENDITURE PER TOURIST (€)
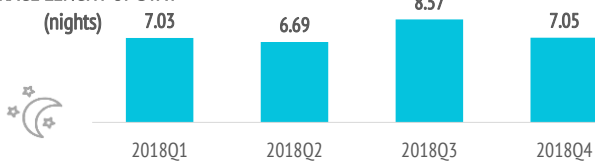
2018Q1	2018Q2	2018Q3	2018Q4
744	842	1,063	826
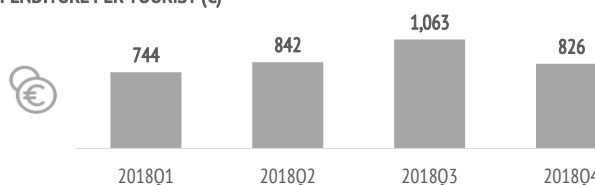
Importance of each factor in the destination choice

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	67.9%	66.7%	61.5%	74.2%	**66.8%**
Tranquility	47.3%	48.5%	48.4%	50.3%	**48.6%**
Landscapes	47.4%	44.5%	47.7%	47.3%	**46.8%**
Sea	41.3%	39.9%	45.5%	43.8%	**42.9%**
Beaches	37.5%	38.0%	42.1%	37.4%	**39.2%**
Environment	36.2%	36.3%	37.4%	37.1%	**36.9%**
European belonging	37.0%	32.3%	35.5%	36.7%	**35.2%**
Safety	35.9%	34.1%	34.6%	36.8%	**35.2%**
Price	26.2%	25.6%	29.1%	23.6%	**26.5%**
Authenticity	25.6%	25.5%	27.6%	26.0%	**26.3%**
Effortless trip	26.8%	23.9%	23.1%	27.3%	**24.9%**
Accommodation supply	21.9%	25.6%	26.8%	21.5%	**24.4%**
Gastronomy	23.5%	21.7%	22.7%	24.2%	**22.9%**
Fun possibilities	21.2%	20.8%	24.4%	19.6%	**21.8%**
Exoticism	12.7%	14.3%	16.3%	13.8%	**14.5%**
Hiking trail network	13.4%	13.7%	11.0%	14.0%	**12.8%**
Historical heritage	13.2%	11.0%	13.0%	13.5%	**12.6%**
Culture	10.6%	8.0%	9.9%	11.4%	**9.9%**
Nightlife	11.8%	7.4%	6.9%	7.2%	**8.0%**
Shopping	9.2%	8.0%	7.6%	7.4%	**8.0%**

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 CLIMATE

2018Q1	68%
2018Q2	67%
2018Q3	62%
2018Q4	74%

What is the main motivation for their holidays?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	36.1%	36.4%	35.2%	35.3%	**35.7%**
Enjoy family time	16.6%	21.5%	21.9%	31.2%	**22.8%**
Have fun	13.8%	6.5%	6.7%	4.2%	**7.5%**
Explore the destination	27.2%	32.4%	33.9%	26.3%	**30.6%**
Practice their hobbies	2.2%	1.7%	1.2%	1.5%	**1.6%**
Other reasons	4.0%	1.5%	1.1%	1.4%	**1.8%**

How far in advance do they book their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	1.4%	1.0%	1.0%	1.0%	**1.1%**
Between 1 and 30 days	37.9%	27.3%	23.9%	27.7%	**28.4%**
Between 1 and 2 months	32.5%	31.2%	28.6%	34.5%	**31.3%**
Between 3 and 6 months	23.4%	30.9%	33.9%	28.9%	**29.9%**
More than 6 months	4.9%	9.6%	12.6%	7.9%	**9.3%**

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE

2018Q1	4.9%
2018Q2	9.6%
2018Q3	12.6%
2018Q4	7.9%

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	34.2%	38.4%	36.0%	41.7%	**37.5%**
Friends or relatives	36.5%	32.0%	36.8%	35.0%	**35.1%**
Internet or social media	46.5%	50.3%	54.1%	46.5%	**50.0%**
Mass Media	1.6%	1.1%	1.8%	1.0%	**1.4%**
Travel guides and magazines	4.6%	5.9%	5.3%	3.3%	**4.9%**
Travel Blogs or Forums	6.1%	7.3%	9.1%	5.6%	**7.3%**
Travel TV Channels	0.4%	0.2%	0.4%	0.0%	**0.2%**
Tour Operator or Travel Agency	13.0%	18.1%	18.2%	14.6%	**16.3%**
Public administrations or similar	2.1%	2.4%	1.0%	1.3%	**1.6%**
Others	3.9%	3.6%	2.8%	3.5%	**3.4%**

* Multi-choise question

With whom did they book their flight and accommodation?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	60.4%	53.3%	51.1%	62.2%	**55.9%**
- Tour Operator or Travel Agency	39.6%	46.7%	48.9%	37.8%	**44.1%**
Accommodation					
- Directly with the accommodation	45.5%	42.3%	40.3%	45.6%	**42.9%**
- Tour Operator or Travel Agency	54.5%	57.7%	59.7%	54.4%	**57.1%**

Where do they stay?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	15.7%	14.8%	10.0%	9.5%	**12.2%**
4* Hotel	30.2%	38.3%	36.9%	32.4%	**34.9%**
5* Hotel / 5* Luxury Hotel	6.0%	9.4%	7.9%	7.2%	**7.8%**
Aparthotel / Tourist Villa	12.0%	15.3%	17.5%	12.6%	**14.8%**
House/room rented in a private dwelli	10.7%	5.1%	7.1%	7.6%	**7.4%**
Private accommodation [(1)]	20.4%	13.2%	14.6%	25.0%	**17.7%**
Others (Cottage, cruise, camping,..)	5.0%	4.0%	6.1%	5.7%	**5.2%**

(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	36.0%	24.9%	28.5%	29.6%	**29.2%**
Bed and Breakfast	18.5%	17.1%	11.9%	16.7%	**15.5%**
Half board	21.8%	23.5%	26.8%	26.4%	**24.8%**
Full board	8.2%	8.4%	5.1%	5.2%	**6.6%**
All inclusive	15.6%	26.1%	27.7%	22.1%	**23.9%**

29.2% of Spanish Mainland tourists book room only.

36.0% 2018Q1

28.5% 2018Q3

24.9% 2018Q2

29.6% 2018Q4

Other expenses

	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	74.9%	70.3%	70.3%	73.7%	**72.0%**
Supermarkets	49.4%	45.7%	54.2%	50.9%	**50.4%**
Car rental	45.3%	49.4%	55.6%	47.9%	**50.3%**
Organized excursions	23.2%	26.6%	30.8%	21.4%	**26.2%**
Taxi, transfer, chauffeur service	25.2%	25.1%	24.4%	22.5%	**24.3%**
Theme Parks	7.6%	12.3%	18.4%	11.8%	**13.2%**
Sport activities	4.9%	4.1%	6.7%	3.1%	**4.9%**
Museums	7.4%	6.8%	10.4%	7.6%	**8.3%**
Flights between islands	6.2%	8.2%	9.4%	7.1%	**8.0%**

Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.3%	1.5%	1.0%	1.1%	**1.0%**
1 - 2 hours	2.1%	5.2%	3.7%	3.1%	**3.6%**
3 - 6 hours	15.2%	19.9%	20.7%	18.8%	**19.0%**
7 - 12 hours	57.4%	55.6%	58.9%	61.4%	**58.3%**
More than 12 hours	25.1%	17.8%	15.7%	15.5%	**18.1%**

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

	2018Q1	2018Q2	2018Q3	2018Q4
0 hours	0%	2%	1%	1%
More than 1 hour	100%	98%	99%	99%
More than 3 hours	98%	93%	95%	96%
More than 7 hours	82%	73%	75%	77%
More than 12 hours	25%	18%	16%	16%
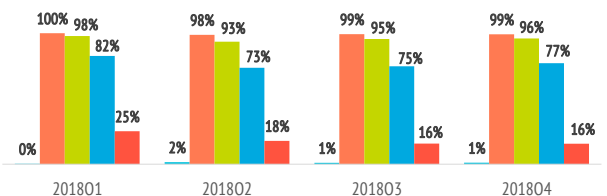
Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	76.9%	77.4%	79.6%	76.0%	**77.7%**
Beach	55.6%	69.6%	82.2%	63.5%	**69.6%**
Explore the island on their own	59.4%	63.1%	67.9%	56.2%	**62.4%**
Swimming pool, hotel facilities	31.1%	54.2%	62.2%	39.9%	**49.1%**
Taste Canarian gastronomy	41.3%	38.1%	43.3%	41.5%	**41.2%**
Theme parks	12.1%	18.1%	23.7%	16.9%	**18.4%**
Wineries/markets/popular festivals	20.2%	16.3%	19.7%	15.3%	**18.0%**
Museums / exhibitions	14.9%	13.8%	18.6%	15.0%	**15.9%**
Nature activities	14.5%	15.7%	16.4%	14.2%	**15.4%**
Nightlife / concerts / shows	18.5%	14.0%	16.0%	12.2%	**15.2%**
Organized excursions	13.7%	14.5%	16.3%	11.1%	**14.2%**
Sport activities	13.5%	10.4%	13.7%	10.9%	**12.2%**
Sea excursions / whale watching	5.8%	10.6%	16.8%	8.5%	**11.2%**
Activities at sea	6.4%	7.7%	13.1%	8.5%	**9.4%**
Beauty and health treatments	5.0%	4.6%	5.2%	5.4%	**5.0%**
Astronomical observation	3.3%	5.1%	5.2%	3.5%	**4.4%**

* Multi-choise question

Canary Islands
LATITUDE OF LIFE

Which island do they choose?

Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	41,586	51,800	76,411	50,205	**220,002**
Fuerteventura	21,040	29,192	43,700	26,169	**120,101**
Gran Canaria	95,636	130,783	171,700	101,879	**499,998**
Tenerife	143,517	172,202	194,044	146,638	**656,401**
La Palma	6,811	11,051	14,825	8,412	**41,099**

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	13.5%	13.1%	15.3%	15.1%	**14.3%**
Fuerteventura	6.8%	7.4%	8.7%	7.9%	**7.8%**
Gran Canaria	31.0%	33.1%	34.3%	30.6%	**32.5%**
Tenerife	46.5%	43.6%	38.8%	44.0%	**42.7%**
La Palma	2.2%	2.8%	3.0%	2.5%	**2.7%**

How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	88.0%	86.2%	85.6%	87.2%	**86.6%**
Two islands	9.6%	11.9%	12.3%	11.1%	**11.4%**
Three or more islands	2.4%	2.0%	2.1%	1.8%	**2.1%**

% TOURISTS BY ISLAND AND QUARTER OF TRIP

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

	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
2018Q1	19%	18%	19%	22%	17%
2018Q2	24%	24%	26%	26%	27%
2018Q3	35%	36%	34%	30%	36%
2018Q4	23%	22%	20%	22%	20%
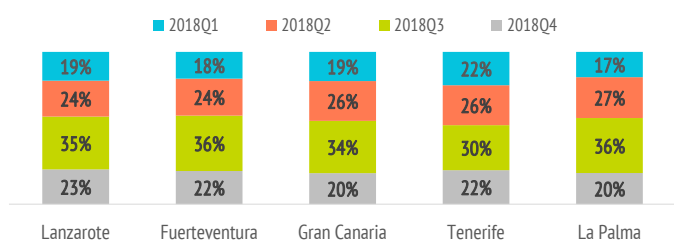
Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	10.7%	15.0%	13.9%	9.6%	**12.6%**
- Flights	8.0%	10.5%	9.1%	6.5%	**8.7%**
- Accommodation	9.8%	12.5%	11.7%	9.4%	**11.0%**
- Transport	13.4%	13.4%	12.5%	12.2%	**12.8%**
- Restaurants	26.6%	29.7%	33.9%	31.2%	**30.8%**
- Excursions	19.6%	26.1%	29.3%	24.4%	**25.6%**
- Activities	25.5%	30.0%	32.7%	26.1%	**29.3%**
Book or purchase					
- Tourist package	18.2%	21.6%	24.6%	21.0%	**21.8%**
- Flights	74.4%	69.0%	71.2%	75.7%	**72.3%**
- Accommodation	58.2%	58.5%	60.1%	58.7%	**59.0%**
- Transport	48.2%	51.8%	56.5%	52.0%	**52.8%**
- Restaurants	14.4%	13.7%	14.7%	14.0%	**14.2%**
- Excursions	12.6%	18.3%	21.3%	15.2%	**17.6%**
- Activities	12.8%	17.4%	21.0%	18.4%	**18.0%**

Multi-choise question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	**9.3%**	**8.6%**	**7.3%**	**8.4%**	**8.3%**
Used the Internet	**90.7%**	**91.4%**	**92.7%**	**91.6%**	**91.7%**
- Own Internet connection	59.0%	57.7%	58.9%	60.8%	**59.0%**
- Free Wifi connection	18.5%	18.6%	22.1%	18.3%	**19.6%**
Applications*					
- Search for locations or maps	74.2%	73.3%	77.0%	73.5%	**74.7%**
- Search for destination info	39.9%	40.5%	42.6%	36.9%	**40.3%**
- Share pictures or trip videos	50.6%	52.5%	57.8%	51.3%	**53.6%**
- Download tourist apps	6.4%	6.6%	6.6%	4.9%	**6.2%**
- Others	18.5%	17.9%	16.7%	17.9%	**17.6%**

Multi-choise question

MOST VISITED PLACES IN EACH ISLAND

LANZAROTE — 70% JAMEOS DEL AGUA

FUERTEVENTURA — 63% DUNAS DE CORRALEJO

GRAN CANARIA — 72% LAS PALMAS DE GRAN CANARIA

TENERIFE — 59% PARQUE NACIONAL DEL TEIDE

LA PALMA — 91% 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	8.47	8.49	8.52	8.59	**8.52**

Experience in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Worse or much worse than expected	3.2%	3.3%	4.7%	3.0%	**3.6%**
Lived up to expectations	59.0%	59.2%	51.6%	58.6%	**56.5%**
Better or much better than expected	37.9%	37.5%	43.7%	38.5%	**39.8%**

Future intentions (scale 1-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Return to the Canary Islands	8.81	8.71	8.58	8.97	**8.74**
Recommend visiting the Canary Islands	8.96	8.92	8.86	9.10	**8.95**

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	**70.9%**	**72.0%**	**67.0%**	**74.9%**	**70.8%**
Repeat tourists (last 5 years)	64.7%	64.1%	57.6%	69.7%	**63.3%**
Repeat tourists (last 5 years)(5 or more visits)	20.4%	17.2%	14.3%	23.7%	**18.3%**
At least 10 previous visits	**17.3%**	**17.3%**	**15.2%**	**24.2%**	**18.1%**

REPEAT TOURISTS
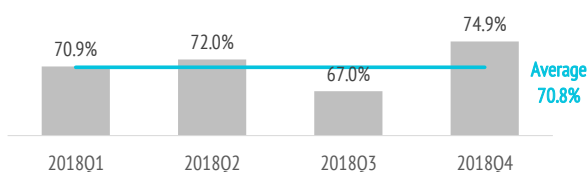
2018Q1	2018Q2	2018Q3	2018Q4	
70.9%	72.0%	67.0%	74.9%	Average 70.8%

Where does the flight come from? 🌐

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Spanish Mainland	99.3%	99.6%	99.7%	99.5%	**99.6%**
United Kingdom	0.2%	0.1%	0.1%	0.1%	**0.1%**
Germany	0.2%	0.1%	0.0%	0.1%	**0.1%**
Sweden	0.1%	0.0%	0.0%	0.1%	**0.0%**
Finland	0.0%	0.0%	0.0%	0.1%	**0.0%**
Belgium	0.0%	0.1%	0.0%	0.0%	**0.0%**
Others	0.3%	0.1%	0.2%	0.2%	**0.2%**

% TOURISTS BY QUARTER OF TRIP

● Spanish Mainland ● Others

2018Q1	2018Q2	2018Q3	2018Q4
99%	100%	100%	99%
1%	0%	0%	1%
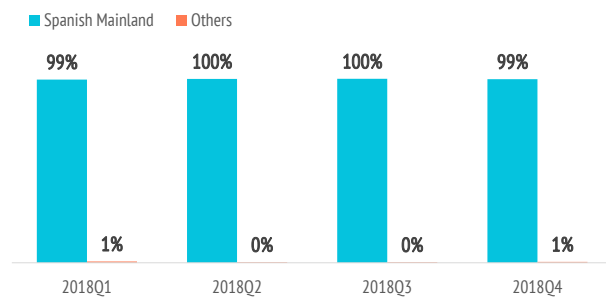
Who do they come with? 👥

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	22.7%	16.2%	13.0%	19.8%	**17.3%**
Only with partner	41.2%	41.8%	36.4%	37.0%	**38.9%**
Only with children (< 13 years old)	4.2%	8.3%	8.9%	8.4%	**7.7%**
Partner + children (< 13 years old)	5.6%	9.9%	14.1%	10.1%	**10.5%**
Other relatives	3.8%	6.9%	5.8%	7.9%	**6.2%**
Friends	9.4%	5.3%	5.8%	3.5%	**5.9%**
Work colleagues	3.1%	1.5%	1.3%	1.7%	**1.8%**
Organized trip	0.8%	0.3%	0.2%	0.1%	**0.3%**
Other combinations [(1)]	9.1%	9.8%	14.5%	11.5%	**11.6%**

(1) Different situations have been isolated

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Tourists with children	**12.3%**	**23.2%**	**28.4%**	**22.6%**	**22.6%**
- Between 0 and 2 years old	1.5%	2.7%	2.3%	3.6%	**2.5%**
- Between 3 and 12 years old	8.9%	18.8%	24.6%	17.5%	**18.4%**
- Between 0 -2 and 3-12 years	2.0%	1.7%	1.5%	1.5%	**1.6%**
Tourists without children	**87.7%**	**76.8%**	**71.6%**	**77.4%**	**77.4%**
Group composition:					
- 1 person	29.4%	18.9%	14.3%	22.5%	**20.3%**
- 2 people	48.1%	46.1%	42.6%	42.1%	**44.5%**
- 3 people	8.7%	13.3%	18.2%	15.5%	**14.4%**
- 4 or 5 people	11.6%	18.6%	21.7%	16.2%	**17.7%**
- 6 or more people	2.1%	3.1%	3.2%	3.7%	**3.1%**
Average group size:	**2.15**	**2.53**	**2.66**	**2.49**	**2.49**

❞

22.6% of Spanish Mainland tourists travel with children.

(under the age of 13)

2018Q1	12.3%
2018Q2	23.2%
2018Q3	28.4%
2018Q4	22.6%

Who are they? 👤

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	57.0%	53.0%	50.8%	51.6%	**52.8%**
Women	43.0%	47.0%	49.2%	48.4%	**47.2%**
Age					
Average age (tourist > 15 years old)	42.6	42.8	40.4	43.1	**42.0**
Standard deviation	14.1	13.1	11.9	12.4	**12.9**
Age range (> 15 years old)					
16 - 24 years old	8.4%	5.5%	9.0%	4.8%	**7.1%**
25 - 30 years old	14.8%	13.1%	15.7%	11.9%	**14.0%**
31 - 45 years old	40.6%	45.5%	41.6%	43.5%	**42.8%**
46 - 60 years old	21.9%	23.4%	28.6%	30.0%	**26.2%**
Over 60 years old	14.3%	12.4%	5.1%	9.7%	**9.8%**
Occupation					
Salaried worker	56.0%	60.6%	65.6%	61.4%	**61.5%**
Self-employed	11.0%	8.9%	12.5%	14.4%	**11.7%**
Unemployed	2.9%	2.2%	4.2%	2.9%	**3.1%**
Business owner	10.0%	12.0%	7.3%	8.3%	**9.2%**
Student	5.5%	4.9%	5.4%	2.3%	**4.6%**
Retired	13.4%	10.2%	4.0%	9.2%	**8.6%**
Unpaid domestic work	0.3%	0.3%	0.7%	1.0%	**0.6%**
Others	0.9%	0.9%	0.3%	0.6%	**0.7%**
Annual household income level					
Less than €25,000	30.6%	26.3%	29.6%	27.7%	**28.5%**
€25,000 - €49,999	44.2%	46.0%	45.5%	45.7%	**45.4%**
€50,000 - €74,999	15.4%	16.6%	15.8%	17.6%	**16.3%**
More than €74,999	9.8%	11.1%	9.0%	9.0%	**9.7%**
Education level					
No studies	0.5%	0.2%	0.5%	0.3%	**0.4%**
Primary education	4.0%	4.5%	4.1%	3.2%	**4.0%**
Secondary education	18.5%	20.1%	20.7%	19.5%	**19.8%**
Higher education	77.0%	75.3%	74.7%	77.1%	**75.8%**

AVERAGE AGE
(> 15 years olf)

2018Q1	42.6
2018Q2	42.8
2018Q3	40.4
2018Q4	43.1

% OF TOURISTS WITH INCOMES BELOW €25,000

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

31%	26%	30%	28%

% SALARIED WORKED TOURISTS

2018Q1	56%
2018Q2	61%
2018Q3	66%
2018Q4	61%