

How many are they and how much do they spend?

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	2019Q1	2019Q2	2019Q3	2019Q4	2019
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.41	0.48	0.67	0.40	1.96
Tourist arrivals > 15 years old (EGT) (*)	0.38	0.44	0.57	0.37	1.76
book holiday package (*)	0.07	0.16	0.20	0.09	0.52
do not book holiday package (*)	0.31	0.28	0.37	0.28	1.24
- % tourists who book holiday package	18.5%	36.6%	35.0%	24.7%	29.7%

(*) Million of tourists

TOURISTS









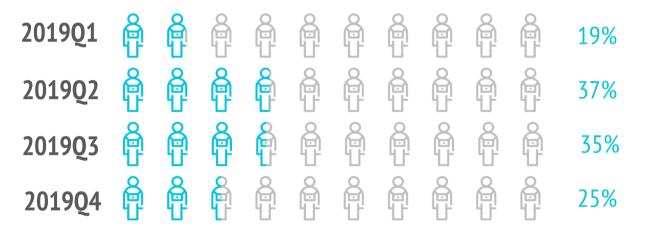
409,635

480,319

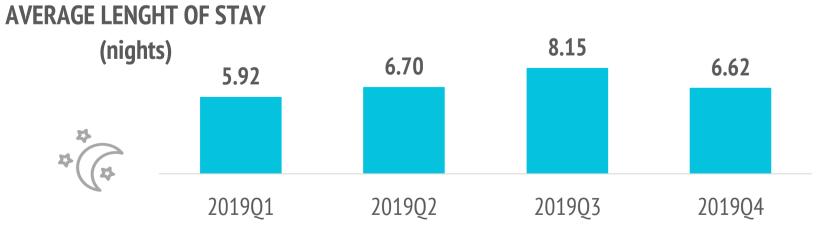
670,916 40

402,521

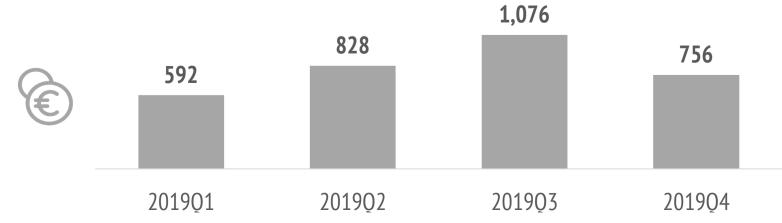
% TOURISTS WHO BOOK HOLIDAY PACKAGE



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Expenditure per tourist (€)	592	828	1,076	756	842
 book holiday package 	865	995	1,204	1,035	1,064
- holiday package	651	773	948	791	827
- others	214	222	256	244	238
 do not book holiday package 	530	731	1,007	664	749
- flight	124	216	248	186	196
- accommodation	160	240	332	209	241
- others	246	275	427	269	312
Average lenght of stay	5.92	6.70	8.15	6.62	6.98
- book holiday package	6.66	6.68	7.24	6.72	6.90
- do not book holiday package	5.75	6.71	8.64	6.58	7.02
Average daily expenditure (€)	114.7	142.1	146.8	131.6	135.6
- book holiday package	140.9	163.0	172.2	167.3	164.3
- do not book holiday package	108.8	130.0	133.2	119.9	123.4
Total turnover (> 15 years old) (€m)	222	367	613	283	1,485
- book holiday package	60	161	240	96	557
- do not book holiday package	162	205	373	188	928



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

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	2019Q1	2019Q2	2019Q3	2019Q4	2019
Climate	72.1%	63.3%	60.6%	73.3%	66.3%
Tranquility	48.5%	50.2%	48.7%	51.0%	49.5%
Landscapes	49.1%	44.4%	48.7%	48.9%	47.8%
Sea	41.4%	42.8%	44.4%	45.1%	43.5%
Environment	42.1%	35.4%	40.7%	40.7%	39.7%
Beaches	37.0%	36.3%	43.0%	37.9%	39.0%
European belonging	35.0%	35.8%	35.5%	34.1%	35.2%
Safety	31.5%	34.4%	33.1%	34.7%	33.4%
Authenticity	29.3%	26.2%	27.9%	27.1%	27.6%
Price	28.2%	27.0%	27.6%	26.4%	27.3%
Accommodation supply	18.1%	25.6%	30.5%	22.6%	25.1%
Gastronomy	27.2%	21.9%	26.2%	23.2%	24.7%
Effortless trip	26.3%	24.7%	21.5%	27.2%	24.5%
Fun possibilities	26.1%	20.3%	23.8%	18.1%	22.3%
Exoticism	17.7%	13.7%	15.9%	13.1%	15.1%
Historical heritage	15.0%	14.8%	14.5%	12.3%	14.2%
Hiking trail network	16.3%	10.6%	12.0%	15.7%	13.3%
Culture	13.1%	10.5%	11.2%	8.7%	10.9%
Nightlife	13.7%	6.6%	7.8%	6.4%	8.4%
Shopping	7.1%	6.1%	8.4%	6.9%	7.2%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important" of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE CLIMATE



What is the main motivation for their holidays?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Rest	30.4%	38.5%	36.6%	36.7%	35.8%
Enjoy family time	21.0%	20.6%	20.9%	26.6%	22.0%
Have fun	15.7%	6.1%	7.6%	6.0%	8.6%
Explore the destination	28.4%	31.3%	32.7%	26.6%	30.2%
Practice their hobbies	2.4%	2.1%	1.3%	2.1%	1.9%
Other reasons	2.1%	1.5%	0.9%	2.0%	1.5%

How far in advance do they book their trip?

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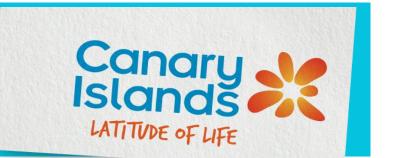
	2019Q1	2019Q2	2019Q3	2019Q4	2019
The same day	1.7%	1.2%	1.2%	1.0%	1.3%
Between 1 and 30 days	42.3%	27.2%	26.2%	31.1%	30.9%
Between 1 and 2 months	32.5%	28.9%	26.6%	32.1%	29.6%
Between 3 and 6 months	19.0%	32.8%	34.8%	26.8%	29.2%
More than 6 months	4.5%	9.9%	11.2%	9.1%	9.0%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



2019Q1	////////// 4.5%
2019Q2	///////////////////////////////////////
2019Q3	///////////////////////////////////////
2019Q4	///////////////////////////////////////

Source: Encuesta sobre el Gasto Turístico (ISTAC).



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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Previous visits to the Canary Islands	37.3%	35.9%	37.7%	39.9%	37.6%
Friends or relatives	39.6%	29.5%	33.2%	32.9%	33.6%
Internet or social media	47.3%	48.7%	54.0%	46.4%	49.6%
Mass Media	1.1%	0.9%	1.2%	0.7%	1.0%
Travel guides and magazines	3.5%	3.9%	4.6%	3.5%	4.0%
Travel Blogs or Forums	6.9%	7.6%	10.1%	8.2%	8.4%
Travel TV Channels	0.4%	0.5%	0.3%	0.3%	0.4%
Tour Operator or Travel Agency	9.1%	21.1%	17.7%	13.8%	15.9%
Public administrations or similar	1.1%	2.2%	0.5%	0.9%	1.1%
Others	3.3%	3.0%	2.8%	4.6%	3.3%

With whom did they book their flight and accommodation?

		_			
	2019Q1	2019Q2	2019Q3	2019Q4	2019
<u>Flight</u>					
- Directly with the airline	72.4%	49.2%	54.5%	64.7%	59.1%
- Tour Operator or Travel Agency	27.6%	50.8%	45.5%	35.3%	40.9%
Accommodation					
- Directly with the accommodation	57.4%	37.4%	43.0%	48.6%	45.4%
- Tour Operator or Travel Agency	42.6%	62.6%	57.0%	51.4%	54.6%

Where do they stay?

* Multi-choise question

		_			
	2019Q1	2019Q2	2019Q3	2019Q4	2019
1-2-3* Hotel	11.4%	13.0%	9.6%	9.7%	10.9%
4* Hotel	26.2%	37.4%	39.9%	33.3%	34.9%
5* Hotel / 5* Luxury Hotel	7.3%	11.5%	9.9%	8.7%	9.5%
Aparthotel / Tourist Villa	13.0%	15.0%	17.9%	12.9%	15.1%
House/room rented in a private dwelling	10.0%	6.2%	6.3%	8.4%	7.5%
Private accommodation (1)	23.3%	13.1%	12.8%	20.8%	16.8%
Others (Cottage, cruise, camping,)	8.7%	3.8%	3.6%	6.1%	5.3%

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

What do they book?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Room only	40.2%	23.6%	27.3%	31.5%	29.7%
Bed and Breakfast	18.8%	17.8%	12.7%	19.2%	16.5%
Half board	17.9%	24.1%	25.6%	23.4%	23.3%
Full board	7.3%	11.0%	5.2%	3.4%	6.8%
All inclusive	15.7%	23.5%	29.2%	22.5%	23.7%

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29.7% of Spanish Mainland book room only.

40.2%
2019Q1



23.6% 2019Q2



Other expenses

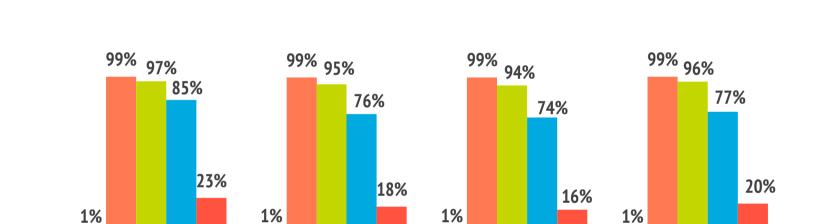
	2019Q1	2019Q2	2019Q3	2019Q4	TOTAL
Restaurants or cafes	74.3%	69.1%	69.1%	71.2%	70.6%
Supermarkets	50.4%	42.4%	52.1%	47.9%	48.4%
Car rental	43.9%	47.4%	55.5%	47.9%	49.4%
Organized excursions	16.2%	27.1%	30.3%	19.5%	24.2%
Taxi, transfer, chauffeur service	22.7%	28.0%	24.3%	23.4%	24.7%
Theme Parks	6.3%	11.8%	15.1%	9.5%	11.2%
Sport activities	3.2%	4.2%	5.5%	5.2%	4.6%
Museums	6.4%	7.0%	8.4%	7.5%	7.4%
Flights between islands	6.8%	6.4%	7.5%	5.8%	6.7%

Activities in the Canary Islands

Outdoor time per day	2019Q1	2019Q2	2019Q3	2019Q4	2019
0 hours	0.7%	1.2%	1.0%	0.7%	0.9%
1 - 2 hours	2.7%	4.2%	5.1%	3.0%	3.9%
3 - 6 hours	11.9%	18.8%	20.1%	19.0%	17.8%
7 - 12 hours	61.6%	58.2%	58.0%	57.7%	58.8%
More than 12 hours	23.2%	17.7%	15.8%	19.5%	18.6%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

2019Q2



2019Q3

2019Q4

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

Activities in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Walk, wander	70.3%	71.4%	75.2%	70.9%	72.3%
Beach	53.8%	64.0%	81.9%	59.9%	66.7%
Explore the island on their own	56.1%	55.2%	63.9%	57.1%	58.6%
Swimming pool, hotel facilities	27.8%	49.5%	63.3%	39.0%	47.1%
Taste Canarian gastronomy	38.6%	37.2%	41.5%	38.2%	39.1%
Theme parks	8.8%	16.9%	21.6%	14.4%	16.1%
Wineries / markets / popular festiva	16.7%	14.0%	18.4%	14.4%	16.1%
Nightlife / concerts / shows	20.4%	13.9%	15.6%	11.2%	15.3%
Museums / exhibitions	13.6%	15.3%	16.9%	14.3%	15.3%
Nature activities	14.3%	15.7%	15.1%	14.1%	14.9%
Organized excursions	8.4%	16.5%	18.0%	10.3%	13.9%
Sport activities	9.5%	11.5%	11.0%	10.3%	10.7%
Sea excursions / whale watching	3.7%	10.7%	16.3%	6.6%	10.1%
Activities at sea	5.3%	9.3%	12.5%	7.2%	9.0%
Beauty and health treatments	5.3%	4.3%	5.1%	4.6%	4.8%
Astronomical observation	2.9%	4.1%	5.5%	3.6%	4.2%

* Multi-choise question

2019Q1





Which island do they choose?



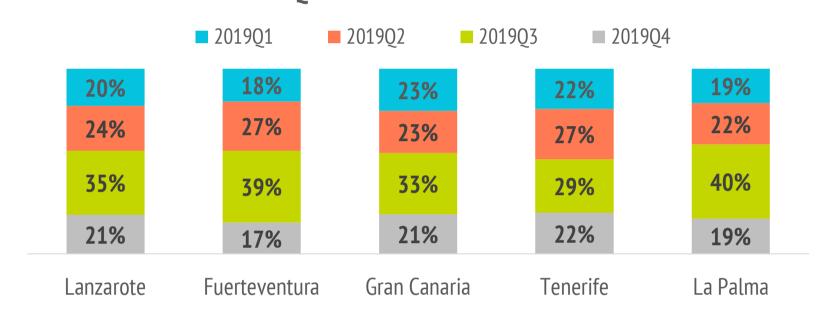
Tourists (> 15 years old)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	52,057	62,727	89,785	54,962	259,531
Fuerteventura	24,691	37,372	54,481	23,640	140,184
Gran Canaria	130,971	131,585	192,494	122,937	577,987
Tenerife	156,927	199,301	210,069	161,936	728,233
La Palma	8,788	10,522	19,028	9,046	47,384

2019Q1	2019Q2	2019Q3	2019Q4	2019
13.9%	14.2%	15.9%	14.8%	14.8%
6.6%	8.5%	9.6%	6.3%	8.0%
35.1%	29.8%	34.0%	33.0%	33.0%
42.0%	45.1%	37.1%	43.5%	41.5%
2.4%	2.4%	3.4%	2.4%	2.7%
	13.9% 6.6% 35.1% 42.0%	13.9% 14.2% 6.6% 8.5% 35.1% 29.8% 42.0% 45.1%	13.9% 14.2% 15.9% 6.6% 8.5% 9.6% 35.1% 29.8% 34.0% 42.0% 45.1% 37.1%	6.6% 8.5% 9.6% 6.3% 35.1% 29.8% 34.0% 33.0% 42.0% 45.1% 37.1% 43.5%

How many islands do they visit during their trip?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
One island	87.3%	87.7%	87.5%	88.6%	87.7%
Two islands	10.8%	11.1%	11.2%	10.1%	10.9%
Three or more islands	1.9%	1.2%	1.3%	1.3%	1.4%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



Internet usage during their trip

TENERIFE

MOST VISITED PLACES IN EACH ISLAND



FUERTEVENTURA



GRAN CANARIA

66% JAMEOS DEL

LANZAROTE

60% **CORRALEJO**

LAS PALMAS DE **GRAN CANARIA**



PARQUE NACIONAL **DEL TEIDE**

88% SANTA CRUZ **DE LA PALMA**

The data refers to % of tourists on each island who have visited the place.

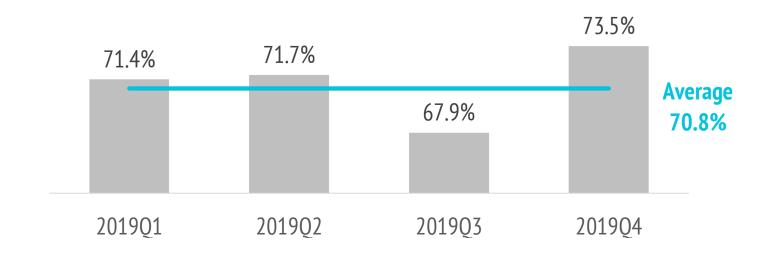
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Average rating	8.63	8.52	8.63	8.65	8.61
Experience in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Worse or much worse than expected	2.6%	3.7%	3.8%	2.5%	3.3%
Lived up to expectations	50.5%	56.4%	52.8%	53.1%	53.3%
Better or much better than expected	46.9%	39.9%	43.5%	44.4%	43.5%
Future intentions (scale 1-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Return to the Canary Islands	8.98	8.81	8.63	9.00	8.83
Recommend visiting the Canary Islands	9.10	8.96	8.92	9.10	9.01

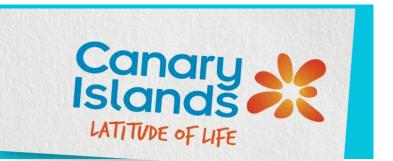
How many are loyal to the Canary Islands?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Repeat tourists	71.4%	71.7%	67.9%	73.5%	70.8%
Repeat tourists (last 5 years)	67.1%	65.2%	58.6%	69.1%	64.3%
Repeat tourists (last 5 years)(5 or more visits)	21.7%	19.0%	14.9%	24.5%	19.4%
At least 10 previous visits	20.0%	18.4%	14.4%	22.8%	18.4%

REPEAT TOURISTS



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Research					
- Tourist package	8.1%	11.1%	13.8%	11.0%	11.4%
- Flights	6.0%	9.6%	9.1%	8.0%	8.3%
- Accommodation	7.7%	12.5%	11.4%	10.7%	10.7%
- Transport	11.2%	12.5%	13.1%	12.2%	12.4%
- Restaurants	31.3%	29.3%	33.1%	31.0%	31.3%
- Excursions	23.5%	24.2%	27.8%	23.5%	25.2%
- Activities	27.4%	27.8%	30.6%	25.2%	28.2%
Book or purchase					
- Tourist package	17.4%	25.8%	26.4%	19.1%	22.9%
- Flights	79.6%	70.7%	73.4%	75.6%	74.5%
- Accommodation	62.7%	60.0%	63.2%	60.0%	61.6%
- Transport	52.9%	53.9%	57.5%	53.1%	54.8%
- Restaurants	14.4%	16.4%	15.5%	14.5%	15.3%
- Excursions	11.9%	19.6%	23.6%	16.7%	18.9%
- Activities	15.0%	20.6%	23.3%	16.0%	19.4%
* Multi-choise question					
Internet usage in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Did not use the Internet	9.5%	7.5%	7.8%	6.3%	7.8%
Used the Internet	90.5%	92.5%	92.2%	93.7%	92.2%
- Own Internet connection	63.4%	57.6%	57.5%	63.1%	60.0%
- Free Wifi connection	12.7%	21.6%	20.0%	17.2%	18.3%
Applications*					
- Search for locations or maps	73.5%	73.1%	76.1%	72.6%	74.0%
- Search for destination info	40.3%	39.6%	46.1%	38.3%	41.6%
- Share pictures or trip videos	53.7%	52.7%	56.1%	50.6%	53.5%
- Download tourist apps	5.6%	6.1%	6.9%	6.4%	6.3%
- Others	16.4%	17.3%	14.5%	17.6%	16.3%
* Multi-choise question					

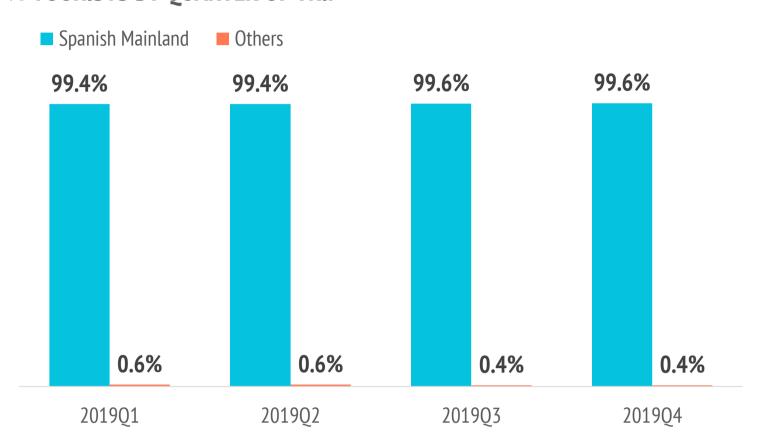


Where does the flight come from?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Spanish Mainland	99.4%	99.4%	99.6%	99.6%	99.5%
United Kingdom	0.2%	0.1%	0.2%	0.0%	0.1%
Germany	0.1%	0.1%	0.1%	0.1%	0.1%
Others	0.3%	0.5%	0.2%	0.3%	0.3%

% TOURISTS BY QUARTER OF TRIP



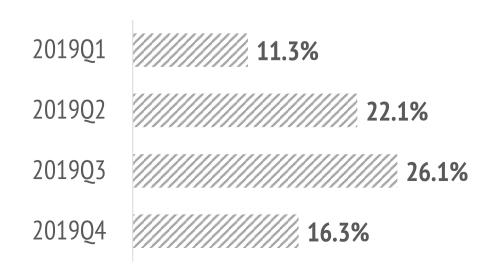
Who do they come with?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Unaccompanied	23.5%	18.4%	12.5%	20.4%	18.0%
Only with partner	39.0%	39.3%	37.3%	39.8%	38.7%
Only with children (< 13 years old)	3.6%	8.0%	9.2%	4.4%	6.7%
Partner + children (< 13 years old)	4.8%	9.6%	12.7%	8.0%	9.2%
Other relatives	5.4%	5.7%	7.3%	8.0%	6.6%
Friends	13.8%	6.2%	5.7%	5.7%	7.6%
Work colleagues	2.2%	1.9%	1.0%	3.0%	1.9%
Organized trip	0.3%	0.2%	0.0%	0.2%	0.2%
Other combinations (1)	7.5%	10.7%	14.3%	10.5%	11.1%
(1) Different situations have been isolated					
Tourists with children	11.3%	22.1%	26.1%	16.3%	19.9%
- Between 0 and 2 years old	1.9%	2.2%	1.5%	1.6%	1.8%
- Between 3 and 12 years old	8.4%	18.2%	23.3%	13.1%	16.7%
- Between 0 -2 and 3-12 years (1.1%	1.7%	1.3%	1.6%	1.4%
Tourists without children	88.7%	77.9%	73.9%	83.7%	80.1%
Group composition:					
- 1 person	29.8%	21.3%	14.3%	23.9%	21.4%
- 2 people	46.4%	45.5%	43.1%	46.6%	45.2%
- 3 people	9.3%	13.3%	17.9%	11.6%	13.6%
- 4 or 5 people	11.5%	17.0%	21.9%	14.3%	16.8%
- 6 or more people	2.9%	3.0%	2.8%	3.5%	3.0%
Average group size:	2.23	2.47	2.65	2.41	2.47

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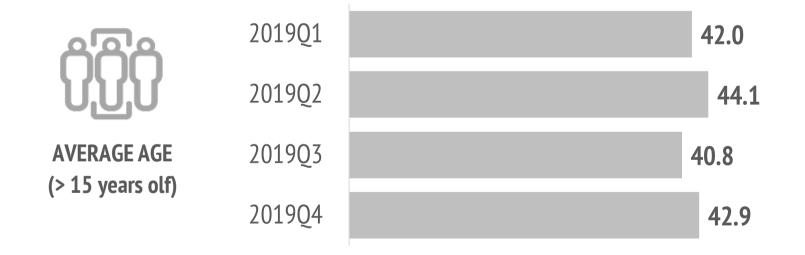
19.9% of Spanish Mainland travel with children.



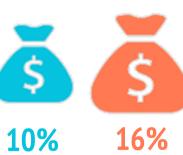


Who are they?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Gender					
Men	56.1%	55.0%	52.0%	53.4%	53.9%
Women	43.9%	45.0%	48.0%	46.6%	46.1%
Age					
Average age (tourist > 15 years old)	42.0	44.1	40.8	42.9	42.3
Standard deviation	13.5	13.5	12.2	12.7	13.0
Age range (> 15 years old)					
16 - 24 years old	7.5%	5.8%	9.7%	4.4%	7.1%
25 - 30 years old	15.7%	13.0%	15.2%	13.9%	14.5%
31 - 45 years old	40.6%	38.9%	39.5%	44.0%	40.5%
46 - 60 years old	24.9%	28.0%	29.6%	27.3%	27.7%
Over 60 years old	11.3%	14.3%	6.0%	10.4%	10.2%
Occupation					
Salaried worker	56.1%	57.3%	64.1%	65.3%	61.0%
Self-employed	14.3%	12.9%	12.5%	10.4%	12.5%
Unemployed	3.8%	2.1%	2.4%	1.6%	2.5%
Business owner	10.4%	9.7%	8.5%	10.8%	9.7%
Student	3.8%	4.0%	7.2%	2.3%	4.6%
Retired	10.3%	11.8%	3.9%	8.5%	8.2%
Unpaid domestic work	0.6%	1.4%	0.5%	0.5%	0.8%
Others	0.5%	0.8%	0.9%	0.5%	0.7%
Annual household income level					
Less than €25,000	29.9%	24.3%	25.6%	24.6%	26.0%
€25,000 - €49,999	45.1%	43.0%	48.1%	43.5%	45.2%
€50,000 - €74,999	15.2%	16.4%	18.0%	19.1%	17.2%
More than €74,999	9.8%	16.2%	8.4%	12.8%	11.6%
Education level					
No studies	0.5%	0.1%	0.3%	0.2%	0.3%
Primary education	3.2%	4.5%	3.7%	3.7%	3.8%
Secondary education	21.4%	18.2%	21.2%	19.3%	20.1%
Higher education	74.9%	77.1%	74.7%	76.8%	75.8%











% SALARIED WORKED TOURISTS

