

# PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

## PORTUGAL



### How many are they and how much do they spend?



|   | Portugal      | All markets       |
|---|---------------|-------------------|
| <b>TOURISTS</b>                                 |               |                   |
| <b>Tourist arrivals (FRONTUR)</b>               | n.d.          | <b>15,559,787</b> |
| <b>Tourist arrivals &gt; 15 years old (EGT)</b> | <b>60,696</b> | <b>13,485,651</b> |
| - book holiday package                          | 30,019        | 7,848,516         |
| - do not book holiday package                   | 30,677        | 5,637,135         |
| - % tourists who book holiday package           | 49.5%         | 58.2%             |
| Share of total tourist                          | 0.5%          | 100%              |

RANKING POSITION BY  
NUMBER OF TOURISTS

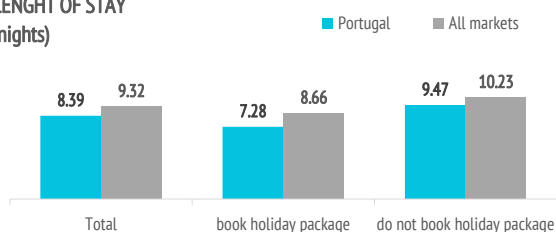
RANKING POSITION BY  
TURNOVER



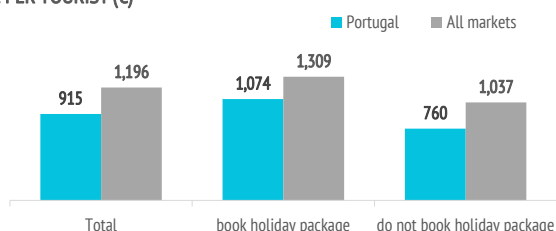
40% of Portuguese  
travel to Tenerife.

|  | Portugal     | All markets   |
|--|--------------|---------------|
| <b>Expenditure per tourist (€)</b>             | <b>915</b>   | <b>1,196</b>  |
| - book holiday package                         | 1,074        | 1,309         |
| - holiday package                              | 893          | 1,064         |
| - others                                       | 180          | 246           |
| - do not book holiday package                  | 760          | 1,037         |
| - flight                                       | 216          | 288           |
| - accommodation                                | 259          | 350           |
| - others                                       | 285          | 399           |
| <b>Average length of stay</b>                  | <b>8.39</b>  | <b>9.32</b>   |
| - book holiday package                         | 7.28         | 8.66          |
| - do not book holiday package                  | 9.47         | 10.23         |
| <b>Average daily expenditure (€)</b>           | <b>130.2</b> | <b>143.6</b>  |
| - book holiday package                         | 152.5        | 159.8         |
| - do not book holiday package                  | 108.4        | 121.0         |
| <b>Total turnover (&gt; 15 years old) (€m)</b> | <b>56</b>    | <b>16,124</b> |
| - book holiday package                         | 32           | 10,277        |
| - do not book holiday package                  | 23           | 5,848         |

AVERAGE LENGTH OF STAY  
(nights)



EXPENDITURE PER TOURIST (€)



### Importance of each factor in the destination choice



|                      | Portugal | All markets |
|----------------------|----------|-------------|
| Climate              | 66.5%    | 78.1%       |
| Sea                  | 47.6%    | 43.3%       |
| Beaches              | 46.5%    | 37.1%       |
| European belonging   | 45.8%    | 35.8%       |
| Tranquility          | 43.3%    | 46.2%       |
| Landscapes           | 39.0%    | 31.6%       |
| Safety               | 38.4%    | 51.4%       |
| Price                | 34.2%    | 36.5%       |
| Environment          | 31.3%    | 30.6%       |
| Accommodation supply | 29.3%    | 41.7%       |
| Fun possibilities    | 24.7%    | 20.7%       |
| Gastronomy           | 20.4%    | 22.6%       |
| Authenticity         | 20.2%    | 19.1%       |
| Effortless trip      | 18.2%    | 34.8%       |
| Exoticism            | 14.8%    | 10.5%       |
| Nightlife            | 13.9%    | 7.5%        |
| Shopping             | 11.8%    | 9.6%        |
| Culture              | 9.0%     | 7.3%        |
| Hiking trail network | 7.7%     | 9.0%        |
| Historical heritage  | 6.3%     | 7.1%        |

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 EUROPEAN BELONGING

PORTUGAL  
45.8%



Picture: Freepik.com

ALL MARKETS  
35.8%

### What is the main motivation for their holidays?



|                         | Portugal | All markets |
|-------------------------|----------|-------------|
| Rest                    | 48.2%    | 55.1%       |
| Enjoy family time       | 13.8%    | 14.7%       |
| Have fun                | 11.9%    | 7.8%        |
| Explore the destination | 23.2%    | 18.5%       |
| Practice their hobbies  | 2.0%     | 1.8%        |
| Other reasons           | 0.9%     | 2.1%        |

EXPLORE THE  
DESTINATION



### How far in advance do they book their trip?



|                        | Portugal | All markets |
|------------------------|----------|-------------|
| The same day           | 1.6%     | 0.7%        |
| Between 1 and 30 days  | 24.6%    | 23.2%       |
| Between 1 and 2 months | 19.5%    | 23.0%       |
| Between 3 and 6 months | 41.7%    | 32.4%       |
| More than 6 months     | 12.6%    | 20.7%       |

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.

# PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

## PORTUGAL



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

|                                       | Portugal | All markets |
|---------------------------------------|----------|-------------|
| Previous visits to the Canary Islands | 23.0%    | 50.9%       |
| Friends or relatives                  | 35.6%    | 27.8%       |
| Internet or social media              | 51.8%    | 56.1%       |
| Mass Media                            | 2.1%     | 1.7%        |
| Travel guides and magazines           | 11.9%    | 9.5%        |
| Travel Blogs or Forums                | 4.1%     | 5.4%        |
| Travel TV Channels                    | 0.0%     | 0.7%        |
| Tour Operator or Travel Agency        | 30.4%    | 24.7%       |
| Public administrations or similar     | 0.0%     | 0.4%        |
| Others                                | 3.4%     | 2.3%        |

\* Multi-choice question

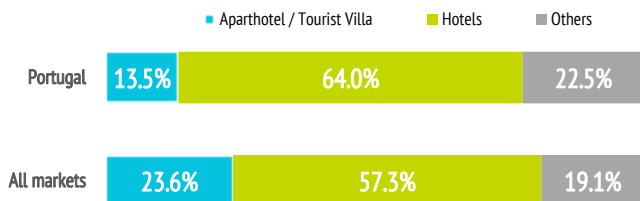
### With whom did they book their flight and accommodation?

|                                   | Portugal | All markets |
|-----------------------------------|----------|-------------|
| <b>Flight</b>                     |          |             |
| - Directly with the airline       | 39.4%    | 39.5%       |
| - Tour Operator or Travel Agency  | 60.6%    | 60.5%       |
| <b>Accommodation</b>              |          |             |
| - Directly with the accommodation | 28.0%    | 28.8%       |
| - Tour Operator or Travel Agency  | 72.0%    | 71.2%       |

### Where do they stay?

|   | Portugal | All markets |
|---|----------|-------------|
| 1-2-3* Hotel                            | 20.3%    | 12.8%       |
| 4* Hotel                                | 39.4%    | 37.7%       |
| 5* Hotel / 5* Luxury Hotel              | 4.3%     | 6.8%        |
| Aparthotel / Tourist Villa              | 13.5%    | 23.6%       |
| House/room rented in a private dwelling | 7.6%     | 5.3%        |
| Private accommodation (1)               | 8.8%     | 7.0%        |
| Others (Cottage, cruise, camping,...)   | 6.1%     | 6.8%        |

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



### What do they book?

|                   | Portugal | All markets |
|-------------------|----------|-------------|
| Room only         | 22.4%    | 28.8%       |
| Bed and Breakfast | 8.8%     | 11.7%       |
| Half board        | 23.8%    | 22.4%       |
| Full board        | 6.2%     | 3.0%        |
| All inclusive     | 38.8%    | 34.1%       |

**38.8%** of Portuguese book all inclusive.  
(Canary Islands: 34.1%)

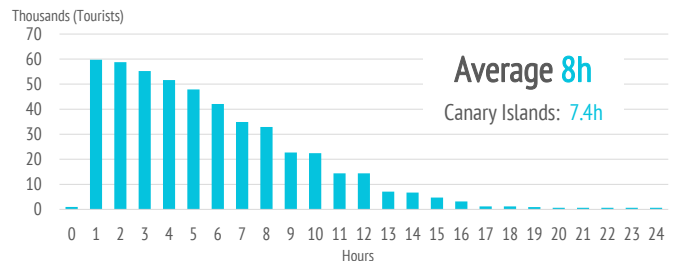
### Other expenses

|                                   | Portugal | All markets |
|-----------------------------------|----------|-------------|
| Restaurants or cafes              | 47.8%    | 63.2%       |
| Supermarkets                      | 47.7%    | 55.9%       |
| Car rental                        | 34.0%    | 26.6%       |
| Organized excursions              | 19.4%    | 21.8%       |
| Taxi, transfer, chauffeur service | 48.9%    | 51.7%       |
| Theme Parks                       | 11.3%    | 8.8%        |
| Sport activities                  | 4.5%     | 6.4%        |
| Museums                           | 7.3%     | 5.0%        |
| Flights between islands           | 7.2%     | 4.8%        |

### Activities in the Canary Islands

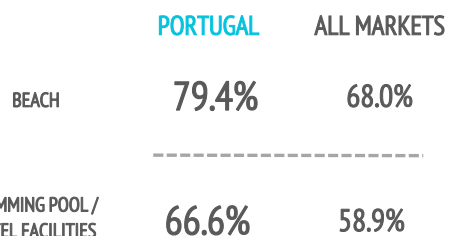
| Outdoor time per day | Portugal | All markets |
|----------------------|----------|-------------|
| 0 hours              | 1.6%     | 2.2%        |
| 1 - 2 hours          | 7.4%     | 10.0%       |
| 3 - 6 hours          | 33.5%    | 32.6%       |
| 7 - 12 hours         | 45.8%    | 46.5%       |
| More than 12 hours   | 11.7%    | 8.7%        |

### TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



| Activities in the Canary Islands       | Portugal | All markets |
|--|----------|-------------|
| Beach                                  | 79.4%    | 68.0%       |
| Swimming pool, hotel facilities        | 66.6%    | 58.9%       |
| Walk, wander                           | 65.9%    | 71.0%       |
| Explore the island on their own        | 46.8%    | 46.5%       |
| Theme parks                            | 22.8%    | 15.5%       |
| Taste Canarian gastronomy              | 22.1%    | 25.4%       |
| Nightlife / concerts / shows           | 21.2%    | 15.5%       |
| Organized excursions                   | 16.3%    | 17.9%       |
| Museums / exhibitions                  | 13.0%    | 9.8%        |
| Nature activities                      | 11.4%    | 10.0%       |
| Activities at sea                      | 10.9%    | 9.8%        |
| Wineries / markets / popular festivals | 8.9%     | 12.0%       |
| Sport activities                       | 7.6%     | 14.3%       |
| Sea excursions / whale watching        | 4.3%     | 11.3%       |
| Beauty and health treatments           | 3.5%     | 5.7%        |
| Astronomical observation               | 2.1%     | 3.4%        |

\* Multi-choice question



# PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

## PORTUGAL



### Which island do they choose?

| Tourists (> 15 years old) | Portugal | All markets |
|---------------------------|----------|-------------|
| Lanzarote                 | 6,176    | 2,457,120   |
| Fuerteventura             | 6,227    | 1,856,705   |
| Gran Canaria              | 23,783   | 3,825,110   |
| Tenerife                  | 24,072   | 4,991,173   |
| La Palma                  | 233      | 249,069     |

### How many islands do they visit during their trip?

|                       | Portugal | All markets |
|-----------------------|----------|-------------|
| One island            | 91.3%    | 90.9%       |
| Two islands           | 5.6%     | 7.7%        |
| Three or more islands | 3.1%     | 1.4%        |

### Internet usage during their trip

|                         | Portugal | All markets |
|-------------------------|----------|-------------|
| <b>Research</b>         |          |             |
| - Tourist package       | 22.4%    | 15.4%       |
| - Flights               | 20.8%    | 13.0%       |
| - Accommodation         | 24.3%    | 17.7%       |
| - Transport             | 23.8%    | 15.6%       |
| - Restaurants           | 26.3%    | 27.0%       |
| - Excursions            | 21.3%    | 26.3%       |
| - Activities            | 30.8%    | 31.0%       |
| <b>Book or purchase</b> |          |             |
| - Tourist package       | 27.6%    | 38.1%       |
| - Flights               | 53.5%    | 64.4%       |
| - Accommodation         | 48.4%    | 54.5%       |
| - Transport             | 35.3%    | 44.7%       |
| - Restaurants           | 10.3%    | 10.5%       |
| - Excursions            | 10.7%    | 11.4%       |
| - Activities            | 10.9%    | 12.5%       |

\* Multi-choice question

| Internet usage in the Canary Island | Portugal     | All markets  |
|-------------------------------------|--------------|--------------|
| <b>Did not use the Internet</b>     | <b>10.2%</b> | <b>9.8%</b>  |
| <b>Used the Internet</b>            | <b>89.8%</b> | <b>90.2%</b> |
| - Own Internet connection           | 34.5%        | 36.5%        |
| - Free Wifi connection              | 42.9%        | 41.1%        |
| <b>Applications*</b>                |              |              |
| - Search for locations or maps      | 65.4%        | 60.7%        |
| - Search for destination info       | 40.0%        | 44.7%        |
| - Share pictures or trip videos     | 53.5%        | 55.6%        |
| - Download tourist apps             | 7.0%         | 6.5%         |
| - Others                            | 16.9%        | 23.9%        |

\* Multi-choice question



65.4% of Portuguese search for locations or maps during their stay in the Canary Islands

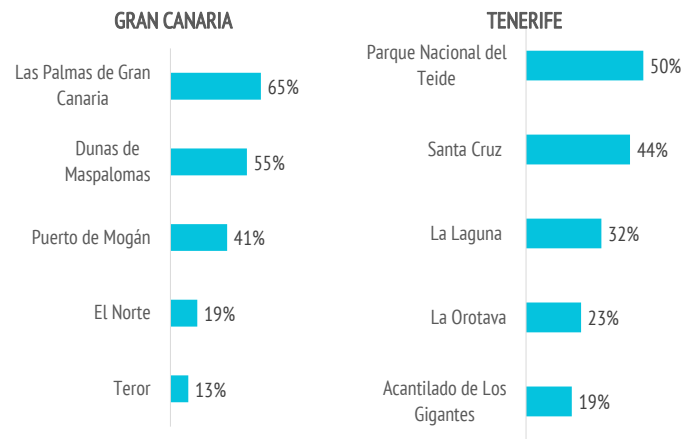
(Canary Islands: 60.7%)



Imagen: Freepik.com

| Share by islands | Portugal | All markets |
|------------------|----------|-------------|
| Lanzarote        | 10.2%    | 18.4%       |
| Fuerteventura    | 10.3%    | 13.9%       |
| Gran Canaria     | 39.3%    | 28.6%       |
| Tenerife         | 39.8%    | 37.3%       |
| La Palma         | 0.4%     | 1.9%        |

### MOST VISITED PLACES IN EACH ISLAND

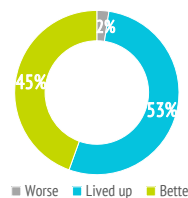


The data refers to % of tourists on each island who have visited the place.

### How do they rate the Canary Islands?

| Satisfaction (scale 0-10)               | Portugal | All markets |
|---|----------|-------------|
| Average rating                          | 8.31     | 8.58        |
| <b>Experience in the Canary Islands</b> |          |             |
| Worse or much worse than expected       | 2.4%     | 2.9%        |
| Lived up to expectations                | 53.1%    | 57.4%       |
| Better or much better than expected     | 44.5%    | 39.7%       |

| Future intentions (scale 1-10)       | Portugal | All markets |
|--------------------------------------|----------|-------------|
| Return to the Canary Islands         | 7.97     | 8.60        |
| Recommend visiting the Canary Island | 8.42     | 8.86        |



Experience in the Canary Islands



7.97/10

Return to the Canary Islands



8.42/10

Recommend visiting the Canary Islands

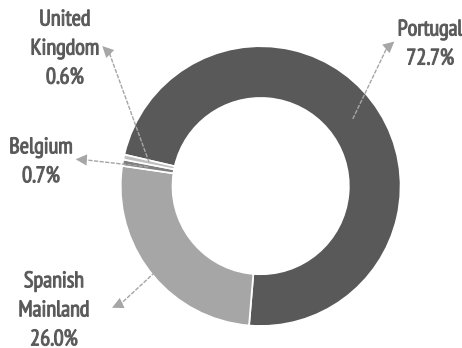
### How many are loyal to the Canary Islands?

|  | Portugal     | All markets  |
|--|--------------|--------------|
| <b>Repeat tourists</b>                     | <b>40.3%</b> | <b>71.0%</b> |
| Repeat tourists (last 5 years)             | 38.2%        | 64.6%        |
| Repeat tourists (last 5 years) (5 or more) | 4.5%         | 18.4%        |
| <b>At least 10 previous visits</b>         | <b>7.2%</b>  | <b>17.8%</b> |

Where does the flight come from?



|                  | %     | Absolute |
|------------------|-------|----------|
| Portugal         | 72.7% | 44,134   |
| Spanish Mainland | 26.0% | 15,774   |
| Belgium          | 0.7%  | 447      |
| United Kingdom   | 0.6%  | 341      |



Who do they come with?



|                                     | Portugal | All markets |
|-------------------------------------|----------|-------------|
| Unaccompanied                       | 14.9%    | 8.9%        |
| Only with partner                   | 34.9%    | 47.4%       |
| Only with children (< 13 years old) | 5.5%     | 5.9%        |
| Partner + children (< 13 years old) | 10.9%    | 7.2%        |
| Other relatives                     | 11.3%    | 9.0%        |
| Friends                             | 8.2%     | 6.3%        |
| Work colleagues                     | 0.6%     | 0.5%        |
| Organized trip                      | 0.0%     | 0.2%        |
| Other combinations (1)              | 13.7%    | 14.6%       |

(1) Different situations have been isolated

|                                  |              |              |
|----------------------------------|--------------|--------------|
| <b>Tourists with children</b>    | <b>23.1%</b> | <b>19.3%</b> |
| - Between 0 and 2 years old      | 2.6%         | 1.8%         |
| - Between 3 and 12 years old     | 19.0%        | 15.8%        |
| - Between 0 -2 and 3-12 years    | 1.5%         | 1.6%         |
| <b>Tourists without children</b> | <b>76.9%</b> | <b>80.7%</b> |
| <b>Group composition:</b>        |              |              |
| - 1 person                       | 18.3%        | 12.4%        |
| - 2 people                       | 37.8%        | 54.1%        |
| - 3 people                       | 20.5%        | 12.6%        |
| - 4 or 5 people                  | 21.3%        | 17.1%        |
| - 6 or more people               | 2.1%         | 3.8%         |
| <b>Average group size:</b>       | <b>2.61</b>  | <b>2.58</b>  |



(Under the age of 13)

23.1% of Portuguese travel with children.

(Canary Islands: 19.3%)

Who are they?



|                                      | Portugal | All markets |
|--------------------------------------|----------|-------------|
| <b>Gender</b>                        |          |             |
| Men                                  | 49.1%    | 48.2%       |
| Women                                | 50.9%    | 51.8%       |
| <b>Age</b>                           |          |             |
| Average age (tourist > 15 years old) | 40.3     | 46.7        |
| Standard deviation                   | 11.4     | 15.3        |
| <b>Age range (&gt; 15 years old)</b> |          |             |
| 16 - 24 years old                    | 7.6%     | 7.7%        |
| 25 - 30 years old                    | 12.9%    | 10.8%       |
| 31 - 45 years old                    | 50.5%    | 28.6%       |
| 46 - 60 years old                    | 22.4%    | 31.3%       |
| Over 60 years old                    | 6.5%     | 21.5%       |
| <b>Occupation</b>                    |          |             |
| Salaried worker                      | 47.6%    | 55.5%       |
| Self-employed                        | 26.6%    | 11.0%       |
| Unemployed                           | 3.8%     | 1.1%        |
| Business owner                       | 13.9%    | 9.2%        |
| Student                              | 4.3%     | 4.2%        |
| Retired                              | 3.4%     | 17.3%       |
| Unpaid domestic work                 | 0.0%     | 0.9%        |
| Others                               | 0.5%     | 0.8%        |
| <b>Annual household income level</b> |          |             |
| Less than €25,000                    | 46.5%    | 17.0%       |
| €25,000 - €49,999                    | 35.2%    | 36.5%       |
| €50,000 - €74,999                    | 9.7%     | 25.0%       |
| More than €74,999                    | 8.6%     | 21.5%       |
| <b>Education level</b>               |          |             |
| No studies                           | 1.2%     | 4.8%        |
| Primary education                    | 0.4%     | 2.8%        |
| Secondary education                  | 28.6%    | 23.1%       |
| Higher education                     | 69.9%    | 69.3%       |



4 IN 10 TOURISTS ARE REPEATERS

40 YEARS OLD

AVERAGE AGE

35% ONLY WITH PARTNER



Pictures: 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.