

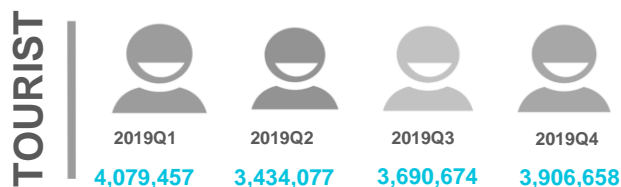
TOURIST PROFILE BY QUARTER OF TRIP (2019) CANARY ISLANDS

How many are they and how much do they spend?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
TOURISTS					
Tourist arrivals (FRONTUR) (*)	4.08	3.43	3.69	3.91	15.11
Tourist arrivals > 15 years old (EGT) (*)	3.59	2.99	3.10	3.59	13.27
- book holiday package (*)	1.91	1.69	1.81	2.01	7.43
- do not book holiday package (*)	1.68	1.30	1.29	1.58	5.85
- % tourists who book holiday package	53.2%	56.4%	58.5%	56.1%	56.0%

(*) Million of tourists



% TOURISTS WHO BOOK HOLIDAY

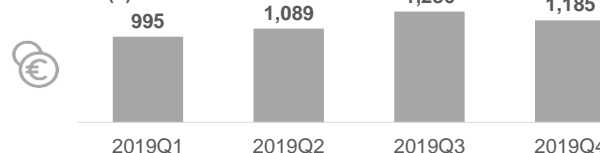


	2019Q1	2019Q2	2019Q3	2019Q4	2019
Expenditure per tourist (€)	995	1,089	1,286	1,185	1,136
- book holiday package	1,140	1,198	1,393	1,335	1,268
- holiday package	907	972	1,142	1,099	1,031
- others	233	226	252	236	237
- do not book holiday package	831	948	1,133	994	967
- flight	198	259	317	293	263
- accommodation	287	304	369	330	321
- others	346	385	447	371	383
Average length of stay	9.29	8.73	9.38	8.96	9.09
- book holiday package	8.78	8.35	8.79	8.59	8.64
- do not book holiday package	9.86	9.21	10.21	9.44	9.68
Average daily expenditure (€)	121.8	139.8	148.9	146.5	138.9
- book holiday package	138.6	153.0	164.7	165.0	155.4
- do not book holiday package	102.7	122.7	126.7	122.9	117.9
Total turnover (> 15 years old) (€m)	3,570	3,259	3,987	4,254	15,070
- book holiday package	2,176	2,023	2,528	2,689	9,416
- do not book holiday package	1,395	1,236	1,459	1,565	5,655

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Climate	82.4%	75.3%	71.9%	82.7%	78.4%
Safety	48.8%	54.6%	53.8%	51.3%	51.9%
Tranquility	45.0%	49.4%	48.5%	47.9%	47.6%
Sea	41.1%	43.5%	46.2%	47.1%	44.4%
Accommodation supply	38.6%	44.6%	46.9%	42.1%	42.9%
Beaches	33.5%	37.5%	42.0%	38.3%	37.7%
Price	36.8%	38.4%	40.0%	34.7%	37.4%
European belonging	36.6%	37.1%	35.0%	35.7%	36.1%
Effortless trip	33.8%	36.7%	34.8%	35.8%	35.2%
Environment	32.2%	34.4%	34.4%	32.3%	33.2%
Landscapes	34.2%	32.8%	33.4%	32.0%	33.1%
Gastronomy	22.4%	23.0%	25.2%	22.6%	23.2%
Fun possibilities	17.3%	22.0%	28.7%	17.6%	21.1%
Authenticity	18.7%	21.8%	23.3%	18.3%	20.3%
Exoticism	10.5%	11.8%	13.8%	9.6%	11.4%
Hiking trail network	12.4%	8.4%	6.9%	10.3%	9.6%
Shopping	7.5%	10.2%	11.9%	8.3%	9.4%
Historical heritage	8.3%	8.3%	9.4%	7.0%	8.2%
Culture	8.2%	8.1%	9.3%	6.7%	8.0%
Nightlife	7.4%	8.9%	10.0%	6.1%	8.0%

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 PRICE



What is the main motivation for their holidays?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Rest	55.4%	55.9%	51.9%	58.3%	55.5%
Enjoy family time	11.4%	14.2%	17.5%	15.0%	14.4%
Have fun	7.8%	9.2%	10.6%	7.1%	8.6%
Explore the destination	20.4%	17.2%	17.7%	15.8%	17.8%
Practice their hobbies	2.5%	1.8%	1.2%	1.8%	1.9%
Other reasons	2.5%	1.6%	1.1%	1.9%	1.8%

How far in advance do they book their trip?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
The same day	0.9%	0.6%	0.7%	0.6%	0.7%
Between 1 and 30 days	30.2%	20.2%	21.9%	22.0%	23.8%
Between 1 and 2 months	26.3%	22.4%	18.7%	23.1%	22.8%
Between 3 and 6 months	27.9%	37.0%	33.4%	33.4%	32.7%
More than 6 months	14.6%	19.8%	25.2%	20.9%	20.0%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC).

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

TOURIST PROFILE BY QUARTER OF TRIP (2019) CANARY ISLANDS



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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Previous visits to the Canary Islands	53.8%	51.0%	46.3%	55.5%	51.9%
Friends or relatives	27.0%	27.1%	29.9%	24.9%	27.1%
Internet or social media	54.7%	54.8%	56.4%	53.1%	54.7%
Mass Media	1.7%	1.6%	1.6%	1.6%	1.6%
Travel guides and magazines	8.2%	9.3%	8.1%	8.0%	8.4%
Travel Blogs or Forums	5.5%	5.6%	7.0%	4.7%	5.7%
Travel TV Channels	0.7%	0.9%	0.7%	0.8%	0.8%
Tour Operator or Travel Agency	19.7%	24.1%	24.8%	22.3%	22.6%
Public administrations or similar	0.5%	0.6%	0.3%	0.3%	0.4%
Others	2.2%	2.5%	2.4%	2.5%	2.4%

* Multi-choise question

With whom did they book their flight and accommodation?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Flight					
- Directly with the airline	47.4%	41.3%	39.4%	42.7%	42.9%
- Tour Operator or Travel Agency	52.6%	58.7%	60.6%	57.3%	57.1%
Accommodation					
- Directly with the accommodation	34.7%	29.7%	28.7%	32.2%	31.5%
- Tour Operator or Travel Agency	65.3%	70.3%	71.3%	67.8%	68.5%

Where do they stay?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
1-2-3* Hotel	11.8%	11.8%	11.4%	11.2%	11.5%
4* Hotel	34.3%	40.2%	39.6%	37.2%	37.6%
5* Hotel / 5* Luxury Hotel	7.5%	9.7%	9.8%	9.1%	9.0%
Aparthotel / Tourist Villa	22.9%	21.8%	23.0%	22.2%	22.5%
House/room rented in a private dwell	7.6%	4.7%	4.3%	6.5%	5.9%
Private accommodation ⁽¹⁾	8.2%	6.5%	7.0%	7.1%	7.2%
Others (Cottage, cruise, camping,...)	7.6%	5.4%	5.0%	6.8%	6.3%

(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	32.8%	24.5%	25.1%	28.4%	27.9%
Bed and Breakfast	13.7%	12.3%	10.2%	13.3%	12.4%
Half board	20.0%	22.0%	21.1%	21.7%	21.2%
Full board	3.9%	4.5%	3.3%	2.8%	3.6%
All inclusive	29.6%	36.7%	40.3%	33.7%	34.9%

34.9% of tourists book all inclusive.



29.6%
2019Q1



40.3%
2019Q3



36.7%
2019Q2



33.7%
2019Q4

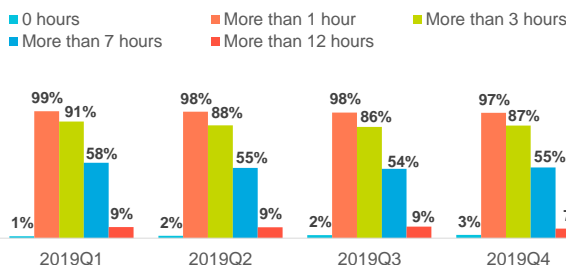
Other expenses

	2019Q1	2019Q2	2019Q3	2019Q4	TOTAL
Restaurants or cafes	63.6%	56.6%	57.0%	58.6%	59.1%
Supermarkets	55.5%	49.5%	52.3%	50.8%	52.1%
Car rental	26.8%	26.1%	27.5%	25.0%	26.3%
Organized excursions	17.2%	21.8%	25.6%	18.7%	20.6%
Taxi, transfer, chauffeur service	48.6%	51.6%	50.6%	49.6%	50.0%
Theme Parks	5.2%	7.8%	11.2%	6.4%	7.5%
Sport activities	4.8%	5.7%	7.0%	5.2%	5.7%
Museums	4.9%	4.2%	4.8%	4.6%	4.6%
Flights between islands	4.5%	4.6%	4.7%	3.8%	4.4%

Activities in the Canary Islands

Outdoor time per day	2019Q1	2019Q2	2019Q3	2019Q4	2019
0 hours	1.4%	1.8%	2.4%	2.6%	2.1%
1 - 2 hours	8.0%	10.5%	11.2%	10.0%	9.8%
3 - 6 hours	32.1%	33.2%	32.6%	32.6%	32.6%
7 - 12 hours	49.9%	46.0%	44.8%	47.4%	47.1%
More than 12 hours	8.6%	8.5%	9.0%	7.5%	8.4%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Walk, wander	72.9%	70.1%	67.1%	68.6%	69.8%
Beach	60.0%	66.3%	74.9%	65.1%	66.3%
Swimming pool, hotel facilities	48.9%	61.6%	69.1%	55.4%	58.2%
Explore the island on their own	48.1%	42.9%	46.0%	43.7%	45.2%
Taste Canarian gastronomy	24.7%	23.5%	25.7%	22.8%	24.2%
Organized excursions	13.5%	17.5%	22.9%	14.6%	16.9%
Nightlife / concerts / shows	14.4%	16.9%	18.3%	13.1%	15.5%
Theme parks	9.5%	14.8%	21.9%	11.6%	14.1%
Sport activities	13.0%	13.5%	14.0%	13.4%	13.4%
Wineries/markets/popular festiva	12.3%	10.9%	12.3%	10.9%	11.6%
Sea excursions / whale watching	7.2%	11.2%	17.6%	9.4%	11.1%
Nature activities	11.8%	10.0%	9.3%	10.1%	10.4%
Museums / exhibitions	10.7%	9.5%	10.7%	9.6%	10.1%
Activities at sea	8.1%	9.8%	13.2%	9.2%	10.0%
Beauty and health treatments	4.9%	5.3%	6.0%	5.5%	5.4%
Astronomical observation	3.5%	2.9%	4.1%	3.5%	3.5%

* Multi-choise question



TOURIST PROFILE BY QUARTER OF TRIP (2019) CANARY ISLANDS



Which island do they choose?

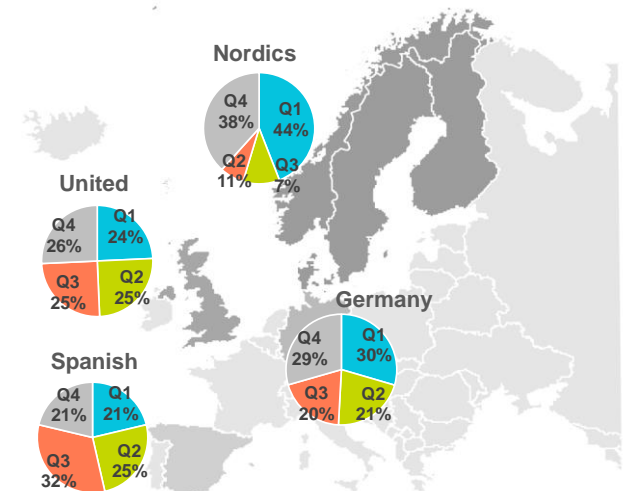
Tourists (> 15 years old)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	632,357	611,145	628,986	649,180	2,521,668
Fuerteventura	413,243	394,670	415,473	435,730	1,659,115
Gran Canaria	1,091,076	743,383	798,802	1,064,867	3,698,127
Tenerife	1,342,298	1,170,011	1,187,434	1,340,639	5,040,382
La Palma	66,451	51,184	54,161	63,613	235,409

Share by islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	17.8%	20.6%	20.4%	18.3%	19.2%
Fuerteventura	11.7%	13.3%	13.5%	12.3%	12.6%
Gran Canaria	30.8%	25.0%	25.9%	30.0%	28.1%
Tenerife	37.9%	39.4%	38.5%	37.7%	38.3%
La Palma	1.9%	1.7%	1.8%	1.8%	1.8%

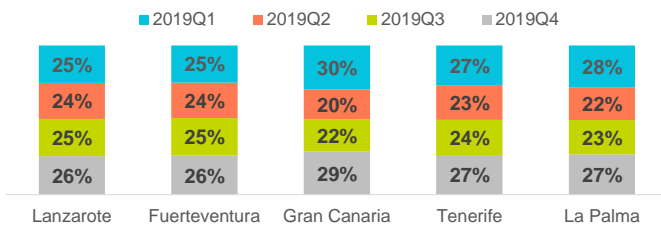
How many islands do they visit during their trip?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
One island	91.1%	91.0%	91.3%	92.1%	91.4%
Two islands	6.9%	7.6%	7.8%	6.7%	7.2%
Three or more islands	2.0%	1.3%	0.8%	1.2%	1.4%

MAIN MARKETS: % TOURISTS BY QUARTER OF TRIP



% TOURISTS BY ISLAND AND QUARTER



Internet usage during their trip

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Research					
- Tourist package	13.3%	14.9%	16.5%	14.4%	14.8%
- Flights	11.5%	13.3%	14.0%	13.4%	13.0%
- Accommodation	15.1%	17.2%	18.4%	17.2%	16.9%
- Transport	14.9%	15.9%	17.0%	15.2%	15.7%
- Restaurants	29.0%	27.6%	29.8%	27.3%	28.4%
- Excursions	25.9%	24.6%	29.4%	24.6%	26.2%
- Activities	29.7%	29.0%	33.1%	28.5%	30.1%
Book or purchase					
- Tourist package	40.1%	38.6%	37.9%	40.6%	39.4%
- Flights	70.3%	65.5%	64.3%	66.5%	66.7%
- Accommodation	59.8%	56.6%	55.8%	56.7%	57.3%
- Transport	49.2%	47.0%	46.8%	47.1%	47.6%
- Restaurants	11.6%	11.9%	12.1%	12.7%	12.1%
- Excursions	10.8%	12.9%	15.6%	12.5%	13.0%
- Activities	12.4%	14.5%	18.1%	13.9%	14.7%

* Multi-choice question

Internet usage in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Did not use the Internet	9.8%	8.7%	6.4%	8.0%	8.3%
Used the Internet	90.2%	91.3%	93.6%	92.0%	91.7%
- Own Internet connection	36.8%	37.3%	39.4%	36.1%	37.4%
- Free Wifi connection	38.9%	39.6%	38.7%	40.7%	39.5%
Applications*					
- Search for locations or maps	62.1%	59.9%	63.8%	60.9%	61.7%
- Search for destination info	45.3%	42.9%	46.3%	44.4%	44.8%
- Share pictures or trip videos	54.0%	55.6%	59.3%	55.3%	56.0%
- Download tourist apps	7.0%	6.6%	7.0%	7.4%	7.0%
- Others	23.9%	24.0%	20.1%	22.4%	22.6%

* Multi-choice question

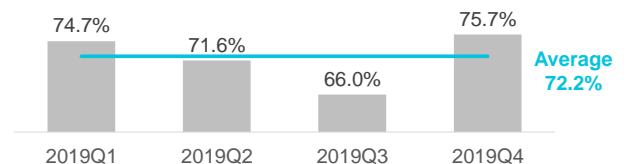
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Average rating	8.71	8.68	8.71	8.69	8.70
Experience in the Canary Islands					
Worse or much worse than expected	2.0%	2.8%	2.8%	1.9%	2.3%
Lived up to expectations	54.5%	56.9%	53.2%	57.5%	55.6%
Better or much better than expected	43.5%	40.3%	44.0%	40.5%	42.1%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.85	8.70	8.54	8.80	8.73
Recommend visiting the Canary Islands	9.02	8.93	8.88	8.98	8.95

How many are loyal to the Canary Islands?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Repeat tourists	74.7%	71.6%	66.0%	75.7%	72.2%
Repeat tourists (last 5 years)	70.0%	66.0%	58.1%	71.5%	66.7%
Repeat tourists (last 5 years)(5 or more visits)	20.9%	20.4%	13.7%	22.4%	19.5%
At least 10 previous visits	19.6%	19.2%	13.9%	21.1%	18.6%

REPEAT TOURISTS



TOURIST PROFILE BY QUARTER OF TRIP (2019) CANARY ISLANDS

Where are they from?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
United Kingdom	29.2%	36.0%	34.7%	30.9%	32.5%
Germany	19.7%	17.1%	15.2%	19.6%	18.0%
Spanish Mainland	10.5%	14.8%	18.4%	10.4%	13.3%
Netherlands	3.8%	3.9%	4.1%	4.0%	3.9%
France	3.5%	4.4%	4.2%	3.5%	3.9%
Ireland	2.9%	4.4%	4.5%	3.2%	3.7%
Sweden	5.6%	1.6%	0.9%	5.1%	3.4%
Italy	3.4%	2.8%	3.4%	2.9%	3.1%
Norway	4.4%	1.4%	1.2%	3.8%	2.8%
Belgium	2.3%	3.0%	2.9%	2.6%	2.7%
Poland	2.5%	2.2%	2.5%	1.6%	2.2%
Denmark	2.9%	1.1%	0.8%	2.3%	1.9%
Switzerland	1.7%	1.7%	1.6%	2.1%	1.8%
Finland	2.9%	0.5%	0.0%	2.6%	1.6%
Austria	0.5%	0.6%	0.6%	0.7%	0.6%
Russia	0.6%	0.5%	0.5%	0.6%	0.6%
Portugal	0.2%	0.7%	0.9%	0.4%	0.5%
Others	3.5%	3.4%	3.8%	3.7%	3.6%

Who do they come with?



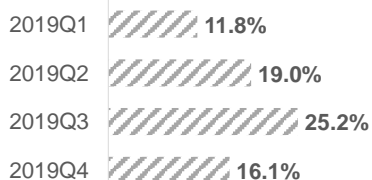
	2019Q1	2019Q2	2019Q3	2019Q4	2019
Unaccompanied	10.7%	9.8%	7.9%	9.8%	9.6%
Only with partner	53.9%	47.5%	39.7%	50.1%	48.1%
Only with children (< 13 years old)	3.9%	6.0%	8.0%	5.0%	5.6%
Partner + children (< 13 years old)	4.3%	6.8%	9.6%	5.7%	6.5%
Other relatives	6.9%	9.5%	11.5%	9.7%	9.3%
Friends	8.3%	6.4%	5.6%	5.3%	6.4%
Work colleagues	0.6%	0.7%	0.3%	0.5%	0.5%
Organized trip	0.3%	0.4%	0.1%	0.3%	0.3%
Other combinations ⁽¹⁾	11.1%	13.0%	17.4%	13.6%	13.7%

(1) Different situations have been isolated

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Tourists with children	11.8%	19.0%	25.2%	16.1%	17.7%
- Between 0 and 2 years old	2.0%	1.8%	1.2%	1.2%	1.6%
- Between 3 and 12 years old	8.5%	15.5%	22.5%	13.7%	14.8%
- Between 0-2 and 3-12 years	1.3%	1.6%	1.5%	1.2%	1.4%
Tourists without children	88.2%	81.0%	74.8%	83.9%	82.3%
Group composition:					
- 1 person	15.3%	13.6%	10.3%	13.1%	13.2%
- 2 people	60.9%	54.7%	47.3%	56.3%	55.1%
- 3 people	9.3%	12.3%	15.8%	11.0%	12.0%
- 4 or 5 people	12.0%	15.8%	22.4%	15.8%	16.3%
- 6 or more people	2.6%	3.5%	4.3%	3.8%	3.5%
Average group size:	2.34	2.53	2.77	2.54	2.54



17.7% of tourists travel with children.



Who are they?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Gender					
Men	48.6%	48.1%	47.7%	49.7%	48.6%
Women	51.4%	51.9%	52.3%	50.3%	51.4%
Age					
Average age (tourist > 15 years old)	49.2	46.8	42.1	49.7	47.1
Standard deviation	15.7	15.6	14.1	14.9	15.4
Age range (> 15 years old)					
16 - 24 years old	5.8%	7.3%	12.4%	4.3%	7.3%
25 - 30 years old	10.0%	11.8%	13.3%	8.9%	10.9%
31 - 45 years old	25.6%	28.8%	33.0%	25.4%	28.0%
46 - 60 years old	31.0%	29.5%	30.6%	35.3%	31.8%
Over 60 years old	27.6%	22.6%	10.7%	26.1%	22.1%
Occupation					
Salaried worker	47.0%	56.1%	63.2%	55.2%	55.0%
Self-employed	11.6%	11.7%	10.7%	12.1%	11.5%
Unemployed	1.3%	1.3%	1.3%	0.7%	1.1%
Business owner	10.7%	8.5%	9.0%	9.1%	9.4%
Student	2.9%	3.3%	6.0%	2.0%	3.5%
Retired	25.0%	17.4%	8.3%	19.4%	17.9%
Unpaid domestic work	0.7%	0.8%	1.1%	0.6%	0.8%
Others	0.8%	1.0%	0.5%	0.8%	0.8%
Annual household income level					
Less than €25,000	17.2%	18.4%	19.3%	15.6%	17.5%
€25,000 - €49,999	40.1%	37.2%	40.0%	33.1%	37.5%
€50,000 - €74,999	21.7%	22.7%	21.8%	24.7%	22.8%
More than €74,999	21.0%	21.7%	19.0%	26.6%	22.2%
Education level					
No studies	3.9%	5.0%	7.1%	4.2%	5.0%
Primary education	2.7%	2.5%	2.3%	2.8%	2.6%
Secondary education	25.5%	23.5%	22.1%	23.0%	23.6%
Higher education	67.9%	69.0%	68.5%	70.0%	68.9%



AVERAGE AGE
(> 15 years old)



% OF TOURISTS WITH
INCOMES OVER €74,999

● 2019Q1 ● 2019Q3
● 2019Q2 ● 2019Q4



% SALARIED WORKED

