

TOURIST PROFILE BY SOURCE MARKETS (2018)

GRAN CANARIA: MAIN SOURCE MARKETS

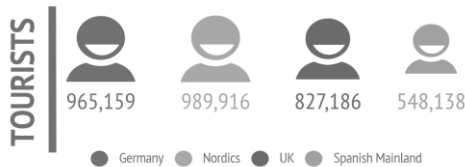


How many are they and how much do they spend?



	Germany	Nordics	UK	Spain	Gran Canaria
TOURISTS					
Tourist arrivals (FRONTUR) (*)	965	990	827	548	4,403
Tourist arrivals > 15 years old (EGT) (*)	862	826	697	500	3,825
- book holiday package (*)	640	562	437	123	2,249
- do not book holiday package (*)	222	264	261	377	1,576
- % tourists who book holiday package	74.2%	68.0%	62.6%	24.5%	58.8%

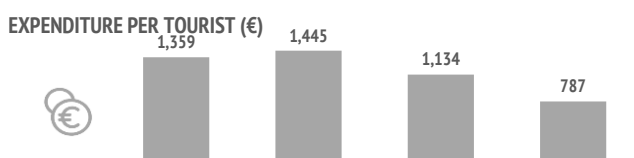
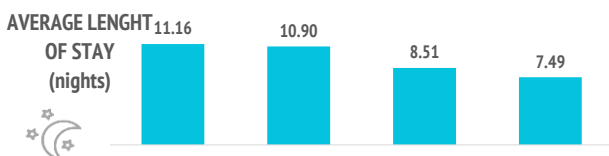
(*) Thousands of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE



	Germany	Nordics	UK	Spain	Gran Canaria
Expenditure per tourist (€)	1,359	1,445	1,134	787	1,231
- book holiday package	1,405	1,445	1,277	1,022	1,351
- holiday package	1171	1,138	1,021	785	1,088
- others	234	308	255	237	264
- do not book holiday package	1,224	1,443	896	711	1,058
- flight	326	436	223	186	290
- accommodation	446	430	315	187	333
- others	452	577	358	337	435
Average length of stay	11.16	10.90	8.51	7.49	9.92
- book holiday package	9.84	9.26	8.26	7.09	8.98
- do not book holiday package	14.98	14.38	8.94	7.62	11.28
Average daily expenditure (€)	140.8	157.9	141.6	126.5	143.2
- book holiday package	151.9	171.0	157.6	158.4	159.9
- do not book holiday package	108.9	130.1	114.9	116.1	119.4
Total turnover (> 15 years old) (€m)	1,171	1,194	791	394	4,707
- book holiday package	899	812	557	125	3,039
- do not book holiday package	272	381	234	268	1,667



Importance of each factor in the destination choice



	Germany	Nordics	UK	Spain	Gran Canaria
Climate	80.1%	86.8%	82.9%	68.6%	79.9%
Safety	58.1%	40.5%	61.0%	34.2%	49.1%
Sea	59.7%	42.9%	34.8%	44.9%	46.2%
Tranquility	49.3%	35.8%	43.3%	47.0%	44.7%
Beaches	50.4%	36.6%	34.9%	44.8%	41.9%
Accommodation supply	41.9%	33.9%	54.2%	23.9%	39.7%
European belonging	43.9%	29.3%	33.8%	36.5%	36.2%
Effortless trip	46.9%	25.1%	39.1%	25.6%	33.3%
Price	27.6%	26.1%	49.2%	28.1%	32.8%
Landscapes	31.2%	17.2%	22.1%	35.1%	27.4%
Environment	20.3%	22.1%	34.1%	27.9%	25.9%
Gastronomy	23.2%	17.7%	23.1%	22.0%	21.7%
Fun possibilities	15.5%	11.1%	28.9%	22.7%	20.1%
Authenticity	15.3%	8.7%	17.4%	22.5%	16.3%
Shopping	10.8%	6.0%	10.6%	10.1%	10.0%
Exoticism	6.6%	6.3%	9.2%	12.0%	9.8%
Nightlife	7.1%	4.9%	12.5%	11.9%	9.1%
Hiking trail network	8.2%	10.9%	3.8%	8.6%	8.1%
Culture	6.7%	3.4%	7.9%	8.6%	6.7%
Historical heritage	5.9%	3.1%	6.5%	9.9%	6.3%

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 BEACHES



What is the main motivation for their holidays?

	Germany	Nordics	UK	Spain	Gran Canaria
Rest	54.1%	58.8%	65.9%	39.7%	55.6%
Enjoy family time	8.3%	29.2%	14.6%	26.0%	17.1%
Have fun	8.2%	3.2%	9.2%	9.3%	8.1%
Explore the destination	24.7%	4.7%	7.6%	20.6%	15.3%
Practice their hobbies	2.1%	1.5%	1.2%	1.8%	1.6%
Other reasons	2.7%	2.5%	1.5%	2.7%	2.3%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?

	Germany	Nordics	UK	Spain	Gran Canaria
The same day	0.9%	0.7%	0.8%	1.6%	0.9%
Between 1 and 30 days	26.3%	25.2%	20.7%	34.6%	26.3%
Between 1 and 2 months	22.7%	22.2%	20.0%	30.5%	23.9%
Between 3 and 6 months	31.8%	31.4%	30.4%	25.3%	31.0%
More than 6 months	18.3%	20.5%	28.1%	8.0%	17.9%

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.

TOURIST PROFILE BY SOURCE MARKETS (2018)

GRAN CANARIA: MAIN SOURCE MARKETS



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

	Germany	Nordics	UK	Spain	Gran Canaria
Previous visits to the Canary Islands	50.9%	62.5%	56.2%	38.6%	50.7%
Friends or relatives	23.9%	22.5%	24.7%	35.1%	26.1%
Internet or social media	52.0%	51.3%	61.7%	44.9%	52.7%
Mass Media	2.0%	1.7%	1.8%	1.7%	1.7%
Travel guides and magazines	12.4%	3.8%	8.5%	3.2%	7.9%
Travel Blogs or Forums	4.3%	2.0%	4.4%	3.0%	3.9%
Travel TV Channels	1.3%	0.4%	0.4%	0.2%	0.6%
Tour Operator or Travel Agency	35.6%	19.6%	26.5%	13.2%	24.9%
Public administrations or similar	0.1%	0.3%	0.3%	1.1%	0.3%
Others	1.7%	2.5%	2.5%	4.1%	2.5%

* Multi-choice question

With whom did they book their flight and accommodation? 👁

	Germany	Nordics	UK	Spain	Gran Canaria
Flight					
- Directly with the airline	23.3%	30.2%	39.8%	61.7%	37.4%
- Tour Operator or Travel Agency	76.7%	69.8%	60.2%	38.3%	62.6%
Accommodation					
- Directly with the accommodation	14.9%	22.7%	28.1%	46.8%	26.6%
- Tour Operator or Travel Agency	85.1%	77.3%	71.9%	53.2%	73.4%

Where do they stay? 🏠

	Germany	Nordics	UK	Spain	Gran Canaria
1-2-3* Hotel	18.5%	17.5%	15.6%	15.3%	16.9%
4* Hotel	40.9%	23.4%	33.6%	24.0%	30.9%
5* Hotel / 5* Luxury Hotel	6.8%	3.3%	7.2%	5.9%	5.9%
Aparthotel / Tourist Villa	19.6%	35.8%	28.3%	14.5%	24.6%
House/room rented in a private dwelling	4.5%	5.5%	3.5%	8.0%	5.4%
Private accommodation (1)	4.7%	6.8%	5.6%	26.0%	9.1%
Others (Cottage, cruise, camping,...)	5.1%	7.7%	6.2%	6.3%	7.2%

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

What do they book? 🏨

	Germany	Nordics	UK	Spain	Gran Canaria
Room only	18.7%	44.6%	32.7%	37.8%	32.7%
Bed and Breakfast	8.3%	18.3%	8.1%	18.8%	12.7%
Half board	38.9%	10.7%	18.2%	17.1%	22.3%
Full board	1.9%	2.2%	1.5%	4.7%	2.4%
All inclusive	32.2%	24.1%	39.6%	21.6%	29.9%

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29.9% of tourists book all inclusive.



32%
Germany



40%
UK



24%
Nordics



22%
Spanish Mainland

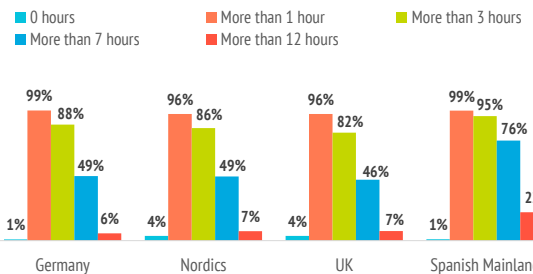
Other expenses 📍

	Germany	Nordics	UK	Spain	Gran Canaria
Restaurants or cafes	58.4%	72.1%	61.1%	68.3%	64.9%
Supermarkets	59.8%	66.0%	56.8%	53.2%	59.7%
Car rental	25.6%	13.0%	9.0%	34.6%	20.7%
Organized excursions	23.5%	11.5%	17.3%	11.9%	17.6%
Taxi, transfer, chauffeur service	59.8%	63.3%	62.1%	27.9%	55.1%
Theme Parks	5.7%	5.5%	8.1%	4.7%	6.1%
Sport activities	6.7%	4.8%	8.3%	4.8%	6.1%
Museums	4.2%	2.3%	2.1%	6.5%	3.8%
Flights between islands	3.3%	2.5%	3.4%	5.2%	3.8%

Activities in the Canary Islands 🚶

Outdoor time per day	Germany	Nordics	UK	Spain	Gran Canaria
0 hours	0.9%	3.6%	3.6%	1.0%	2.0%
1 - 2 hours	10.7%	10.7%	14.2%	4.2%	10.0%
3 - 6 hours	39.2%	36.8%	35.9%	18.6%	33.2%
7 - 12 hours	43.5%	41.7%	39.0%	54.6%	44.8%
More than 12 hours	5.6%	7.2%	7.3%	21.6%	10.0%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	Germany	Nordics	UK	Spain	Gran Canaria
Beach	81.4%	65.0%	67.4%	69.8%	71.9%
Walk, wander	50.5%	79.1%	74.9%	75.0%	68.5%
Swimming pool, hotel facilities	43.7%	67.7%	73.2%	40.0%	57.3%
Explore the island on their own	48.6%	40.0%	35.5%	50.9%	44.2%
Taste Canarian gastronomy	30.9%	16.9%	20.2%	36.2%	24.3%
Nightlife / concerts / shows	16.7%	14.5%	24.8%	19.8%	18.8%
Organized excursions	18.7%	10.2%	15.9%	6.3%	14.0%
Sport activities	15.9%	11.1%	10.7%	12.2%	12.8%
Theme parks	10.6%	9.6%	14.3%	9.1%	11.4%
Wineries / markets / popular festivals	10.1%	13.4%	8.4%	13.6%	10.9%
Sea excursions / whale watching	13.1%	6.9%	14.9%	4.9%	10.5%
Activities at sea	14.2%	4.3%	10.2%	7.1%	9.1%
Museums / exhibitions	9.0%	5.8%	6.2%	13.9%	8.6%
Nature activities	11.8%	7.2%	4.2%	9.1%	8.4%
Beauty and health treatments	5.8%	6.9%	6.4%	3.8%	6.1%
Astronomical observation	4.0%	3.1%	1.6%	2.7%	2.8%

* Multi-choice question



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Which places do they visit in Lanzarote?



	Germany	Nordics	UK	Spain	Gran Canaria
Dunas de Maspalomas	70.5%	28.4%	42.0%	57.4%	51.0%
Las Palmas de Gran Canaria	45.5%	27.1%	32.4%	72.4%	44.8%
Puerto de Mogán	46.4%	35.4%	39.3%	41.2%	41.6%
El interior (cumbres)	33.6%	11.0%	12.1%	24.2%	22.0%
El Norte	23.7%	10.5%	9.4%	35.4%	19.4%
Roque Nublo	21.5%	6.4%	6.2%	21.8%	14.8%
Agate	16.0%	7.0%	5.1%	26.8%	13.2%
Teror	17.4%	6.4%	5.4%	20.8%	12.7%
Barranco de Guayadeque	8.9%	2.9%	2.7%	15.4%	7.2%

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5 in 10 tourists in Gran Canaria visit Maspalomas Dunes nature reserve

Internet usage during their trip



	Germany	Nordics	UK	Spain	Gran Canaria
Research					
- Tourist package	17.9%	7.4%	13.2%	9.8%	13.2%
- Flights	13.2%	7.6%	14.2%	8.2%	11.6%
- Accommodation	23.0%	9.0%	19.4%	9.4%	16.2%
- Transport	16.9%	10.9%	15.7%	14.6%	15.7%
- Restaurants	22.4%	23.5%	26.4%	28.3%	24.8%
- Excursions	28.7%	21.6%	22.2%	19.7%	24.0%
- Activities	32.9%	24.6%	28.2%	26.3%	28.9%
Book or purchase					
- Tourist package	37.4%	53.8%	44.8%	18.3%	39.1%
- Flights	45.6%	78.5%	66.0%	74.8%	65.0%
- Accommodation	34.6%	66.7%	57.1%	57.4%	53.4%
- Transport	22.1%	57.7%	47.3%	45.4%	41.5%
- Restaurants	4.5%	15.0%	9.5%	14.5%	10.2%
- Excursions	8.6%	11.5%	7.8%	9.4%	9.3%
- Activities	7.3%	12.5%	10.7%	11.0%	10.1%

* Multi-choise question

Internet usage in the Canary Islands	Germany	Nordics	UK	Spain	Gran Canaria
Did not use the Internet	9.4%	8.0%	12.5%	9.7%	9.5%
Used the Internet	90.6%	92.0%	87.5%	90.3%	90.5%
- Own Internet connection	33.1%	32.8%	31.3%	58.5%	36.4%
- Free Wifi connection	45.0%	43.8%	45.1%	18.7%	40.7%
Applications*					
- Search for locations or maps	60.5%	52.8%	51.0%	69.5%	59.0%
- Search for destination info	47.2%	46.5%	42.1%	34.2%	43.3%
- Share pictures or trip videos	55.4%	52.8%	55.9%	48.6%	55.0%
- Download tourist apps	5.8%	7.7%	4.2%	5.3%	6.1%
- Others	23.9%	36.7%	29.1%	22.1%	26.6%

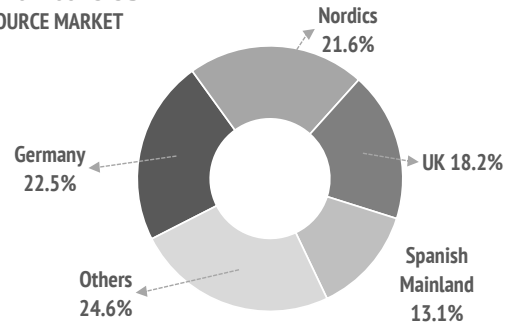
* Multi-choise question

How many islands do they visit during their trip?



	Germany	Nordics	UK	Spain	Gran Canaria
One island	92.7%	96.2%	94.8%	88.6%	92.8%
Two islands	5.3%	3.6%	4.7%	9.3%	6.0%
Three or more islands	2.1%	0.2%	0.5%	2.0%	1.2%

SHARE OF TOURISTS BY SOURCE MARKET



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	Germany	Nordics	UK	Spain	Gran Canaria
Average rating	8.44	8.40	8.82	8.50	8.52
Experience in the Canary Islands					
Worse or much worse than expected	1.1%	2.1%	2.7%	3.8%	2.7%
Lived up to expectations	60.9%	65.3%	54.8%	60.1%	60.1%
Better or much better than expected	38.0%	32.6%	42.6%	36.1%	37.2%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.49	8.52	8.79	8.83	8.55
Recommend visiting the Canary Islands	8.78	8.65	8.94	8.93	8.77

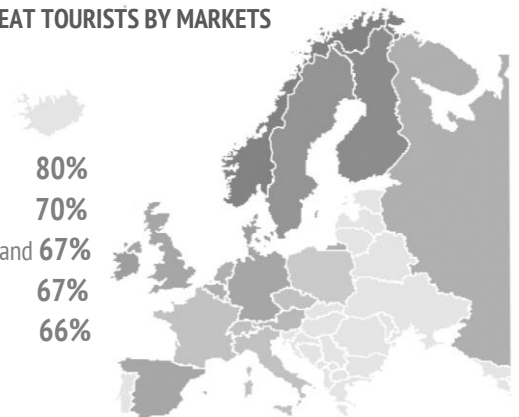
How many are loyal to the Canary Islands?



	Germany	Nordics	UK	Spain	Gran Canaria
Gran Canaria: Repeat tourists	66.9%	80.4%	66.3%	67.4%	66.7%
Gran Canaria: At least 10 previous visits	11.3%	20.2%	11.0%	14.8%	13.2%
Canary Islands: Repeat tourists	71.0%	84.0%	74.2%	77.0%	73.0%
Canary Islands: At least 10 previous visits	17.0%	28.4%	19.4%	25.5%	20.6%

TOP 5: % REPEAT TOURISTS BY MARKETS

Nordics	80%
Ireland	70%
Spanish Mainland	67%
Germany	67%
UK	66%



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Where does the flight come from?



	Germany	Nordics	UK	Spain	Gran Canaria
Germany	92.8%	0.3%	0.1%	0.1%	22.7%
United Kingdom	0.1%	0.6%	96.4%	0.1%	17.9%
Spanish Mainland	2.4%	1.2%	2.3%	99.3%	17.7%
Norway	0.0%	35.2%	0.2%	0.0%	7.7%
Sweden	0.0%	32.8%	0.0%	0.1%	7.2%
Netherlands	0.2%	0.1%	0.0%	0.0%	4.9%
Denmark	0.0%	17.0%	0.1%	0.0%	3.7%
Switzerland	2.1%	0.1%	0.0%	0.0%	3.1%
Finland	0.0%	12.3%	0.0%	0.1%	2.7%
Belgium	0.2%	0.0%	0.1%	0.0%	2.5%
Italy	0.0%	0.0%	0.0%	0.0%	1.7%
Ireland	0.0%	0.0%	0.6%	0.0%	1.7%
France	0.1%	0.1%	0.0%	0.0%	1.3%
Poland	0.0%	0.1%	0.1%	0.0%	1.3%
Austria	0.1%	0.0%	0.0%	0.0%	0.6%
Others	1.9%	0.2%	0.3%	0.4%	3.4%

Who do they come with?



	Germany	Nordics	UK	Spain	Gran Canaria
Unaccompanied	11.4%	7.8%	9.8%	26.4%	12.9%
Only with partner	52.8%	47.2%	45.5%	33.6%	45.7%
Only with children (< 13 years old)	4.5%	6.1%	5.5%	5.0%	5.2%
Partner + children (< 13 years old)	5.3%	6.4%	7.7%	7.0%	6.2%
Other relatives	5.1%	8.0%	11.9%	6.2%	7.8%
Friends	8.4%	5.7%	7.0%	8.9%	7.6%
Work colleagues	0.3%	0.3%	0.4%	3.4%	0.9%
Organized trip	0.1%	0.1%	0.1%	0.1%	0.1%
Other combinations (1)	12.2%	18.5%	12.2%	9.4%	13.5%

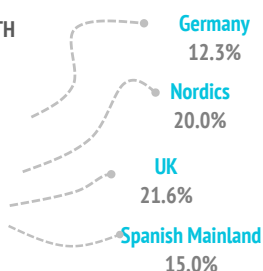
(1) Different situations have been isolated

Tourists with children	12.3%	20.0%	21.6%	15.0%	16.5%
- Between 0 and 2 years old	1.6%	1.9%	1.9%	2.2%	1.8%
- Between 3 and 12 years old	9.9%	15.9%	18.5%	11.8%	13.4%
- Between 0 -2 and 3-12 years old	0.9%	2.1%	1.3%	1.0%	1.3%
Tourists without children	87.7%	80.0%	78.4%	85.0%	83.5%
Group composition:					
- 1 person	13.8%	10.6%	12.6%	29.9%	16.0%
- 2 people	63.0%	56.1%	53.8%	41.5%	54.7%
- 3 people	10.4%	9.5%	12.1%	12.9%	11.0%
- 4 or 5 people	11.5%	18.3%	17.9%	13.4%	15.1%
- 6 or more people	1.3%	5.5%	3.6%	2.3%	3.2%
Average group size:	2.27	2.69	2.58	2.23	2.45

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
Gran Canaria: 16.5%



Who are they?



	Germany	Nordics	UK	Spain	Gran Canaria
Gender					
Men	51.1%	47.2%	44.7%	54.7%	50.1%
Women	48.9%	52.8%	55.3%	45.3%	49.9%
Age					
Average age (tourist > 15 years old)	46.2	53.2	46.8	42.6	47.1
Standard deviation	16.2	15.4	15.7	13.8	15.9
Age range (> 15 years old)					
16 - 24 years old	9.6%	5.1%	9.2%	8.1%	8.4%
25 - 30 years old	12.9%	4.9%	10.0%	14.2%	10.6%
31 - 45 years old	25.5%	20.7%	27.6%	39.3%	27.6%
46 - 60 years old	30.5%	31.2%	31.3%	26.8%	29.9%
Over 60 years old	21.5%	38.1%	21.9%	11.6%	23.4%
Occupation					
Salaried worker	57.0%	47.8%	57.6%	59.5%	53.4%
Self-employed	9.2%	7.4%	11.9%	12.6%	10.5%
Unemployed	0.2%	0.8%	1.1%	3.2%	1.3%
Business owner	11.9%	11.5%	5.0%	8.4%	10.4%
Student	5.9%	2.4%	3.0%	5.2%	4.7%
Retired	14.5%	28.6%	19.1%	9.6%	18.0%
Unpaid domestic work	0.6%	0.2%	1.1%	0.6%	0.7%
Others	0.7%	1.2%	1.1%	1.0%	1.0%
Annual household income level					
Less than €25,000	12.5%	7.1%	18.7%	29.6%	16.7%
€25,000 - €49,999	33.6%	28.3%	37.5%	44.6%	35.5%
€50,000 - €74,999	29.5%	33.0%	24.6%	16.3%	25.8%
More than €74,999	24.5%	31.7%	19.1%	9.5%	22.0%
Education level					
No studies	0.6%	1.4%	11.1%	0.1%	2.7%
Primary education	4.9%	4.9%	0.8%	3.7%	3.6%
Secondary education	24.7%	32.7%	20.1%	18.3%	25.7%
Higher education	69.9%	61.0%	68.0%	77.8%	67.9%



AVERAGE AGE
(> 15 years old)

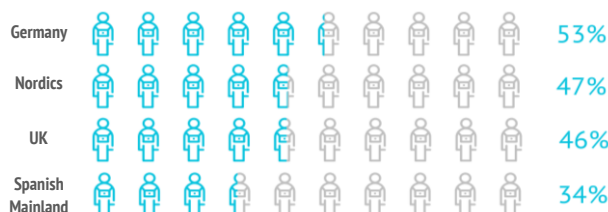


% OF TOURISTS WITH INCOMES OVER €74,999

Germany Nordics UK Spanish Mainland



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



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.