

Tourist profile trend (2017)

Tenerife: Second Quarter



How many are they and how much do they spend?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	880,137	952,834	938,517	1,159,088	1,223,753
Average daily expenditure (€)	122.42	131.92	137.24	129.81	138.98
.in their place of residence	83.92	91.13	94.63	88.91	94.08
.in the Canary Islands	38.50	40.78	42.61	40.90	44.90
Average lenght of stay	9.75	8.80	8.53	8.66	8.40
Turnover per tourist (€)	1,035	1,048	1,053	994	1,055
Total turnover (> 16 years old) (€m)	911	998	988	1,152	1,291
Share of total turnover	20.6%	21.4%	20.1%	21.4%	--
Share of total tourist	22.0%	22.7%	22.1%	23.7%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	55.86	46.34	47.68	49.00	60.82
- Accommodation	50.57	41.33	40.58	41.03	51.25
- Additional accommodation expenses	5.30	5.01	7.10	7.97	9.57
Transport:	27.53	25.15	26.06	21.58	23.83
- Public transport	7.64	4.14	4.81	3.44	3.73
- Taxi	6.81	7.25	6.89	5.57	6.01
- Car rental	13.07	13.76	14.36	12.57	14.09
Food and drink:	152.51	135.99	155.39	144.80	152.13
- Food purchases at supermarkets	71.81	55.46	69.93	64.78	69.57
- Restaurants	80.70	80.53	85.46	80.02	82.56
Souvenirs:	54.85	68.43	57.76	54.69	56.34
Leisure:	43.46	39.88	47.26	35.26	36.33
- Organized excursions	22.00	17.05	17.26	16.47	19.11
- Leisure, amusement	7.16	6.63	8.32	6.65	6.74
- Trip to other islands	3.50	1.50	5.88	1.85	0.92
- Sporting activities	2.94	5.02	6.46	3.36	4.09
- Cultural activities	1.85	2.14	1.64	1.48	1.23
- Discos and disco-pubs	6.01	7.55	7.70	5.44	4.24
Others:	19.40	13.54	22.73	12.13	16.09
- Wellness	4.05	3.26	2.81	2.50	2.35
- Medical expenses	1.80	1.23	7.59	1.64	0.92
- Other expenses	13.55	9.04	12.32	7.98	12.82

How far in advance do they book their trip?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.6%	0.6%	0.9%	0.7%	0.8%
Between 2 and 7 days	8.7%	8.4%	7.8%	6.5%	5.7%
Between 8 and 15 days	9.8%	8.6%	8.2%	7.5%	6.6%
Between 16 and 30 days	17.9%	16.1%	13.9%	15.7%	13.9%
Between 31 and 90 days	33.3%	34.0%	34.8%	35.7%	37.2%
More than 90 days	29.8%	32.3%	34.4%	33.8%	35.7%

What do they book at their place of residence?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	15.1%	11.5%	12.3%	12.0%	11.8%
Flight and accommodation (room only)	22.5%	21.8%	24.0%	26.8%	25.6%
Flight and accommodation (B&B)	7.8%	8.1%	9.0%	8.8%	10.4%
Flight and accommodation (half board)	23.5%	22.9%	21.5%	21.2%	21.9%
Flight and accommodation (full board)	5.5%	6.1%	5.0%	3.8%	4.9%
Flight and accommodation (all inclusive)	25.5%	29.6%	28.2%	27.3%	25.3%
% Tourists using low-cost airlines	45.7%	43.7%	50.5%	58.2%	54.8%
Other expenses in their place of residence:					
- Car rental	11.3%	11.0%	13.4%	14.8%	15.5%
- Sporting activities	4.2%	4.0%	4.3%	3.9%	4.3%
- Excursions	5.6%	6.2%	7.1%	7.2%	8.9%
- Trip to other islands	1.2%	1.6%	1.7%	1.0%	1.1%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

How do they book?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation booking					
Tour Operator	37.4%	41.8%	39.0%	37.9%	38.4%
- Tour Operator's website	72.7%	73.1%	81.3%	78.4%	81.5%
Accommodation	17.1%	14.9%	16.3%	17.2%	16.8%
- Accommodation's website	77.2%	81.9%	80.7%	83.3%	83.8%
Travel agency (High street)	20.1%	21.4%	20.0%	20.1%	18.6%
Online Travel Agency (OTA)	14.8%	14.2%	16.0%	17.3%	18.5%
No need to book accommodation	10.6%	7.7%	8.6%	7.5%	7.6%

Flight booking

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tour Operator	40.1%	43.1%	41.9%	40.2%	42.7%
- Tour Operator's website	71.5%	72.2%	78.7%	76.8%	79.9%
Airline	29.1%	26.3%	30.0%	29.6%	29.2%
- Airline's website	95.9%	96.8%	95.6%	96.8%	97.5%
Travel agency (High street)	19.6%	19.9%	17.9%	18.4%	16.4%
Online Travel Agency (OTA)	11.2%	10.6%	10.1%	11.8%	11.7%

Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	11.0%	9.8%	10.0%	9.8%	9.2%
4* Hotel	40.8%	43.2%	40.8%	39.4%	42.3%
1-2-3* Hotel	11.3%	12.0%	12.7%	12.2%	11.4%
Apartment	24.5%	24.1%	26.1%	29.9%	27.7%
Property (privately-owned, friends, family)	9.8%	7.8%	7.6%	5.9%	6.5%
Others	2.6%	3.0%	2.9%	2.9%	2.9%

Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Gender					
Percentage of men	42.9%	45.3%	47.7%	47.4%	45.9%
Percentage of women	57.1%	54.7%	52.3%	52.6%	54.1%
Age					
Average age (tourists > 16 years old)	43.9	43.9	41.6	43.4	44.3
Standard deviation	14.7	14.2	13.9	14.8	15.3
Age range (> 16 years old)					
16-24 years old	9.3%	8.5%	12.6%	9.3%	10.0%
25-30 years old	13.7%	14.3%	15.2%	15.7%	13.5%
31-45 years old	32.1%	31.4%	31.7%	31.0%	30.7%
46-60 years old	29.0%	32.3%	30.3%	29.4%	28.9%
Over 60 years old	15.9%	13.5%	10.2%	14.6%	17.0%
Occupation					
Business owner or self-employed	23.8%	25.1%	27.3%	26.0%	27.1%
Upper/Middle management employee	35.0%	36.5%	36.2%	33.9%	34.6%
Auxiliary level employee	18.5%	18.4%	17.3%	18.6%	16.6%
Students	5.5%	4.2%	7.3%	5.1%	4.4%
Retired	14.5%	12.7%	8.7%	13.2%	14.4%
Unemployed / unpaid dom. work	2.7%	3.2%	3.2%	3.1%	2.8%
Annual household income level					
€12,000 - €24,000	24.6%	21.1%	21.0%	22.6%	21.0%
€24,001 - €36,000	21.0%	21.5%	20.2%	20.8%	20.2%
€36,001 - €48,000	16.5%	16.1%	16.4%	15.5%	15.0%
€48,001 - €60,000	14.2%	13.1%	13.1%	12.9%	14.8%
€60,001 - €72,000	7.9%	8.8%	7.4%	9.1%	8.2%
€72,001 - €84,000	4.9%	5.1%	6.1%	6.0%	6.3%
More than €84,000	10.8%	14.5%	15.9%	13.1%	14.4%

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Which island do they choose?

Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	417,411	469,065	478,832	562,021	596,941
- Fuerteventura	328,775	391,383	388,881	461,607	465,702
- Gran Canaria	530,449	586,170	605,205	750,985	833,264
- Tenerife	880,137	952,834	938,517	1,159,088	1,223,753
- La Palma	25,365	29,530	36,959	46,894	55,390

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	19.1%	19.3%	19.6%	18.9%	18.8%
- Fuerteventura	15.1%	16.1%	15.9%	15.5%	14.7%
- Gran Canaria	24.3%	24.1%	24.7%	25.2%	26.2%
- Tenerife	40.3%	39.2%	38.3%	38.9%	38.5%
- La Palma	1.2%	1.2%	1.5%	1.6%	1.7%

Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	10.7%	9.6%	8.8%	9.8%	8.8%
Only with partner	47.8%	47.8%	46.4%	48.6%	48.3%
Only with children (under the age of 13)	1.8%	1.4%	1.4%	1.2%	1.6%
Partner + children (under the age of 13)	11.2%	11.7%	11.6%	10.1%	11.0%
Other relatives	6.4%	6.6%	6.6%	5.4%	6.2%
Friends	6.8%	7.2%	7.0%	7.9%	6.9%
Work colleagues	0.3%	0.4%	0.5%	0.4%	0.5%
Other combinations ⁽¹⁾	15.0%	15.4%	17.8%	16.5%	16.8%

* Multi-choice question (different situations have been isolated)

How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	92.4%	93.6%	94.5%	94.8%	95.1%
Average rating (scale 1-10)	8.73	8.87	8.94	8.94	8.99

How many are loyal to the destination?

Repeat tourists of the island	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	54.4%	55.3%	53.8%	52.9%	53.1%
In love (at least 10 previous visits)	7.6%	6.9%	6.6%	5.8%	7.0%

Where are they from?



Ten main source markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
United Kingdom	366,235	398,194	389,863	482,868	516,713
Spanish Mainland	132,487	126,498	127,758	163,277	184,440
Germany	110,361	116,340	116,607	157,671	157,694
Italy	18,376	26,462	38,266	44,218	49,381
Belgium	31,029	35,684	40,634	47,188	43,676
France	30,903	43,519	40,415	44,483	42,219
Netherlands	25,417	27,738	28,941	39,926	38,710
Ireland	26,155	28,518	30,073	26,944	31,568
Poland	950	13,959	7,516	11,837	22,954
Russia	30,064	36,420	28,085	25,724	21,478

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	89.6%	89.2%	87.6%	87.2%	86.3%
Tranquillity/rest/relaxation	34.6%	34.1%	31.6%	30.7%	31.8%
Scenery	24.2%	25.9%	26.0%	26.4%	27.7%
Beaches	23.2%	23.2%	21.4%	24.6%	26.5%
Visiting new places	15.0%	16.6%	16.0%	14.8%	15.6%
Price	15.2%	15.1%	14.9%	13.6%	13.2%
Ease of travel	10.6%	8.6%	9.2%	9.1%	9.3%
Theme parks	6.4%	5.7%	8.0%	7.6%	8.1%
Security	4.5%	4.7%	4.8%	9.3%	7.5%
Quality of the environment	6.7%	6.8%	8.1%	7.3%	7.1%
Suitable destination for children	8.0%	8.3%	8.6%	6.1%	6.6%
Active tourism	5.2%	5.3%	6.3%	6.1%	5.8%
Nightlife/fun	5.2%	5.0%	5.7%	4.5%	5.0%
Shopping	4.0%	3.6%	3.7%	2.7%	3.1%
Culture	2.7%	2.0%	3.1%	3.1%	2.8%
Nautical activities	1.6%	1.6%	1.5%	1.7%	1.6%

* Multi-choice question

What did motivate them to come?

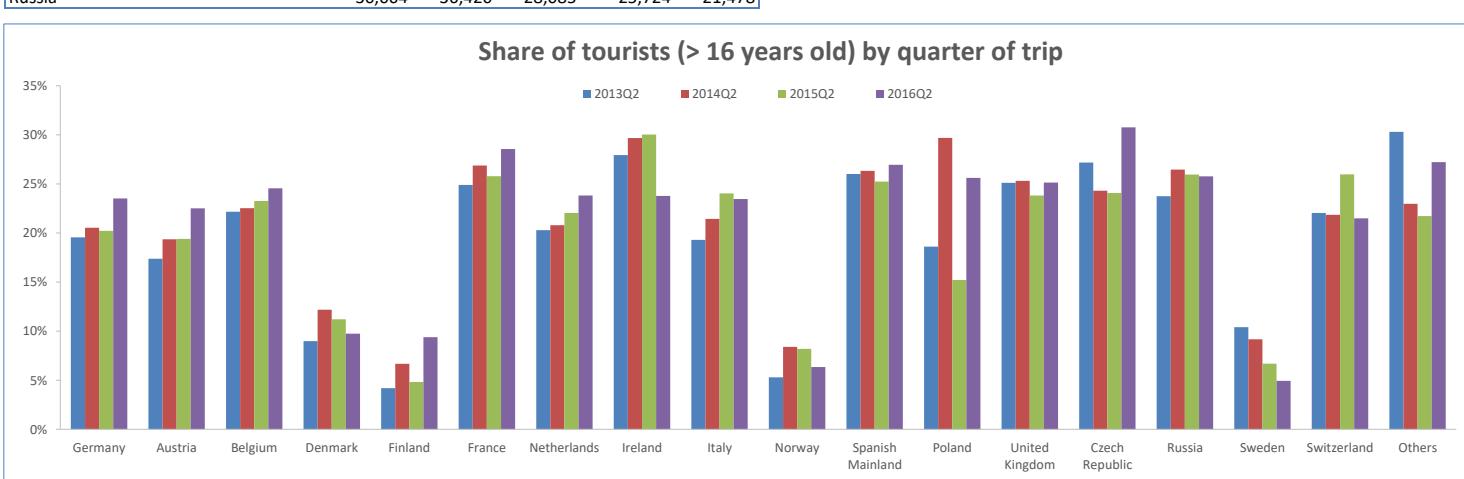


Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	61.4%	59.6%	60.3%	59.7%	59.9%
Recommendation by friends or relatives	38.7%	37.3%	37.0%	37.8%	37.2%
The Canary Islands television channel	0.3%	0.4%	0.6%	0.4%	0.3%
Other television or radio channels	0.7%	1.2%	0.6%	1.0%	1.3%
Information in the press/magazines/books	4.0%	3.3%	3.6%	3.7%	3.5%
Attendance at a tourism fair	0.9%	0.4%	0.4%	0.7%	0.5%
Tour Operator's brochure or catalogue	8.9%	8.1%	6.3%	5.5%	6.0%
Recommendation by Travel Agency	8.1%	9.4%	8.4%	7.9%	7.7%
Information obtained via the Internet	25.6%	24.0%	23.6%	22.2%	21.9%
Senior Tourism programme	0.8%	0.4%	0.4%	0.5%	0.7%
Others	7.5%	6.1%	6.1%	6.0%	6.0%

* Multi-choice question

Share of tourists (> 16 years old) by quarter of trip

■ 2013Q2 ■ 2014Q2 ■ 2015Q2 ■ 2016Q2



Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

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