

Tourist profile trend (2016)

Tenerife: Fourth Quarter



How many are they and how much do they spend?



How do they book?

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	1,026,851	1,123,476	1,092,650	1,144,231	1,280,669
Average daily expenditure (€)	131.99	137.25	137.47	142.76	144.20
.in their place of residence	92.82	97.15	95.63	99.57	102.22
.in the Canary Islands	39.17	40.10	41.83	43.18	41.98
Average lenght of stay	9.22	9.01	9.00	8.84	8.47
Turnover per tourist (€)	1,117	1,108	1,096	1,132	1,110
Total turnover (> 16 years old) (€m)	1,147	1,245	1,197	1,295	1,421
Share of total turnover	26.5%	28.1%	25.7%	26.4%	26.4%
Share of total tourist	26.3%	28.1%	26.1%	26.9%	26.2%
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	38.93	43.10	43.07	55.66	49.12
- Accommodation	33.33	40.02	36.62	46.31	43.62
- Additional accommodation expenses	5.61	3.08	6.44	9.35	5.50
Transport:	25.52	25.98	25.73	22.10	21.95
- Public transport	4.59	5.26	4.58	3.75	3.71
- Taxi	6.90	6.67	5.82	5.95	5.63
- Car rental	14.03	14.04	15.32	12.40	12.61
Food and drink:	152.73	142.12	161.94	163.26	154.33
- Food purchases at supermarkets	61.30	57.82	62.91	67.57	70.90
- Restaurants	91.43	84.30	99.02	95.70	83.43
Souvenirs:	58.56	63.31	66.82	57.45	58.78
Leisure:	40.09	43.55	37.00	35.56	33.03
- Organized excursions	17.35	22.58	16.27	15.15	14.83
- Leisure, amusement	7.24	7.87	7.20	6.53	6.95
- Trip to other islands	1.86	1.52	1.31	0.97	1.29
- Sporting activities	3.60	4.47	5.03	4.40	3.44
- Cultural activities	1.99	1.78	1.08	1.96	1.18
- Discos and disco-pubs	8.03	5.32	6.10	6.55	5.34
Others:	27.35	17.68	27.89	15.85	11.88
- Wellness	5.67	3.20	2.95	2.88	2.38
- Medical expenses	1.60	1.21	0.79	1.07	1.52
- Other expenses	20.07	13.27	24.15	11.90	7.98

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.4%	0.6%	0.5%	0.7%	0.6%
Between 2 and 7 days	7.8%	8.0%	9.0%	7.2%	5.8%
Between 8 and 15 days	10.5%	9.1%	9.3%	8.8%	7.2%
Between 16 and 30 days	16.6%	13.5%	15.4%	15.4%	15.8%
Between 31 and 90 days	35.5%	33.3%	33.1%	35.2%	35.0%
More than 90 days	29.2%	35.4%	32.7%	32.7%	35.5%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	12.1%	11.6%	13.4%	13.7%	12.2%
Flight and accommodation (room only)	23.6%	25.2%	24.6%	26.7%	28.2%
Flight and accommodation (B&B)	8.8%	9.8%	10.9%	10.2%	10.6%
Flight and accommodation (half board)	23.3%	20.7%	20.5%	19.5%	20.6%
Flight and accommodation (full board)	6.8%	4.5%	4.5%	4.4%	4.2%
Flight and accommodation (all inclusive)	25.5%	28.1%	26.0%	25.4%	24.3%
% Tourists using low-cost airlines	33.9%	43.4%	43.4%	49.6%	51.2%
Other expenses in their place of residence:					
- Car rental	10.2%	12.8%	12.5%	12.5%	13.9%
- Sporting activities	3.9%	4.5%	3.4%	3.9%	3.9%
- Excursions	5.5%	6.7%	6.0%	6.8%	6.8%
- Trip to other islands	2.0%	1.4%	1.5%	1.2%	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?

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	46.2%	43.2%	43.9%	43.5%	39.4%
- Tour Operator's website	75.1%	78.2%	75.0%	80.7%	80.8%
Accommodation	13.3%	14.5%	15.8%	13.5%	16.6%
- Accommodation's website	77.7%	79.2%	80.0%	82.9%	82.4%
Travel agency (High street)	21.2%	18.9%	17.5%	17.1%	17.4%
Online Travel Agency (OTA)	12.3%	14.9%	14.1%	15.7%	18.1%
No need to book accommodation	7.0%	8.5%	8.7%	10.1%	8.5%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	48.8%	46.4%	46.0%	46.3%	44.0%
- Tour Operator's website	74.4%	75.2%	75.8%	79.4%	78.5%
Airline	21.4%	26.3%	26.4%	27.5%	28.3%
- Airline's website	93.2%	96.6%	96.2%	95.0%	95.7%
Travel agency (High street)	20.4%	17.4%	16.9%	15.6%	16.5%
Online Travel Agency (OTA)	9.4%	9.9%	10.7%	10.6%	11.2%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	10.1%	9.7%	9.2%	10.1%	8.5%
4* Hotel	40.0%	38.6%	39.6%	38.3%	39.7%
1-2-3* Hotel	12.8%	12.4%	12.6%	12.0%	11.3%
Apartment	27.2%	29.0%	28.2%	28.1%	30.9%
Property (privately-owned, friends, family)	5.8%	7.7%	8.2%	9.6%	6.8%
Others	4.1%	2.6%	2.2%	1.9%	2.7%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	46.0%	46.7%	46.1%	48.8%	49.3%
Percentage of women	54.0%	53.3%	53.9%	51.2%	50.7%
Age					
Average age (tourists > 16 years old)	47.2	44.5	44.9	44.4	44.4
Standard deviation	14.5	13.4	13.3	14.2	14.1
Age range (> 16 years old)					
16-24 years old	6.0%	6.4%	6.0%	7.8%	7.6%
25-30 years old	10.7%	12.0%	11.3%	13.9%	12.3%
31-45 years old	27.4%	34.9%	34.1%	30.9%	33.7%
46-60 years old	35.8%	33.5%	35.7%	33.3%	31.2%
Over 60 years old	20.1%	13.2%	12.8%	14.1%	15.2%
Occupation					
Business owner or self-employed	23.8%	25.2%	27.7%	26.7%	27.9%
Upper/Middle management employee	34.4%	38.0%	36.6%	35.4%	37.5%
Auxiliary level employee	17.3%	18.4%	17.8%	17.9%	16.2%
Students	2.6%	3.4%	3.1%	4.5%	4.3%
Retired	18.9%	12.1%	11.9%	12.6%	11.5%
Unemployed / unpaid dom. work	3.0%	2.9%	2.9%	2.9%	2.7%
Annual household income level					
€12,000 - €24,000	20.3%	19.3%	18.4%	18.4%	19.9%
€24,001 - €36,000	21.0%	18.2%	18.4%	19.5%	19.6%
€36,001 - €48,000	17.4%	17.4%	16.1%	16.1%	15.4%
€48,001 - €60,000	13.0%	13.7%	15.2%	13.9%	14.0%
€60,001 - €72,000	6.9%	8.4%	8.9%	9.2%	9.0%
€72,001 - €84,000	5.4%	6.2%	5.1%	5.2%	6.1%
More than €84,000	16.0%	16.7%	17.9%	17.8%	16.0%

Tourist profile trend (2016)

Tenerife: Fourth Quarter



Which island do they choose?

Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	445,569	482,417	467,397	527,062	600,909
- Fuerteventura	371,091	407,337	398,938	437,284	495,222
- Gran Canaria	788,308	901,778	863,399	951,656	1,064,140
- Tenerife	1,026,851	1,123,476	1,092,650	1,144,231	1,280,669
- La Palma	37,879	35,785	37,346	45,080	65,961

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	16.7%	16.3%	16.3%	17.0%	17.1%
- Fuerteventura	13.9%	13.8%	14.0%	14.1%	14.1%
- Gran Canaria	29.5%	30.6%	30.2%	30.6%	30.3%
- Tenerife	38.5%	38.1%	38.2%	36.8%	36.5%
- La Palma	1.4%	1.2%	1.3%	1.5%	1.9%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	8.4%	10.1%	9.1%	10.4%	8.9%
Only with partner	52.8%	45.7%	44.4%	47.0%	41.2%
Only with children (under the age of 13)	1.0%	1.5%	1.4%	1.3%	1.7%
Partner + children (under the age of 13)	7.8%	9.7%	14.2%	9.7%	13.8%
Other relatives	6.8%	7.7%	6.9%	7.1%	6.8%
Friends	6.0%	4.9%	5.0%	4.9%	5.2%
Work colleagues	0.8%	0.2%	0.6%	0.4%	0.4%
Other combinations ⁽¹⁾	16.3%	20.3%	18.4%	19.2%	22.0%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	93.5%	92.0%	93.7%	94.2%	92.9%
Average rating (scale 1-10)	8.79	8.75	8.82	8.92	8.83

How many are loyal to the destination?

Repeat tourists of the island	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	58.7%	55.4%	58.3%	56.8%	56.4%
In love (at least 10 previous visits)	8.1%	6.8%	7.5%	6.7%	6.6%

Where are they from?



Ten main source markets	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
United Kingdom	362,507	383,392	389,402	444,109	494,022
Germany	159,930	165,933	154,732	164,428	179,745
Spanish Mainland	116,274	110,026	109,974	110,177	136,705
Belgium	39,321	40,945	42,253	45,952	51,009
Denmark	35,107	49,571	26,015	21,407	45,602
Italy	20,133	24,345	33,246	32,647	44,480
Finland	8,309	51,770	38,260	32,880	40,354
Sweden	64,194	74,795	54,179	51,511	40,068
Netherlands	32,022	34,438	33,254	34,560	39,008
France	24,639	28,324	35,980	35,661	33,057

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	92.7%	90.8%	91.5%	90.6%	91.1%
Tranquillity/rest/relaxation	38.7%	35.0%	34.9%	32.7%	31.9%
Beaches	22.3%	23.2%	23.2%	25.3%	25.1%
Scenery	24.7%	22.8%	25.1%	26.7%	24.0%
Visiting new places	14.2%	14.4%	13.0%	12.2%	14.1%
Price	14.1%	13.6%	12.6%	12.0%	11.9%
Ease of travel	9.8%	8.6%	9.6%	8.5%	9.3%
Security	5.0%	5.6%	5.1%	8.4%	9.1%
Suitable destination for children	5.6%	7.9%	8.8%	6.8%	8.4%
Quality of the environment	7.2%	6.7%	6.8%	6.8%	6.5%
Theme parks	4.4%	5.0%	5.5%	5.7%	5.8%
Active tourism	5.1%	5.7%	6.7%	6.0%	5.7%
Shopping	4.3%	4.0%	3.6%	4.0%	4.0%
Nightlife/fun	4.6%	4.1%	4.5%	4.3%	3.9%
Culture	2.0%	2.8%	2.3%	2.4%	2.2%
Nautical activities	1.7%	1.6%	1.7%	1.6%	1.7%

* Multi-choice question

What did motivate them to come?

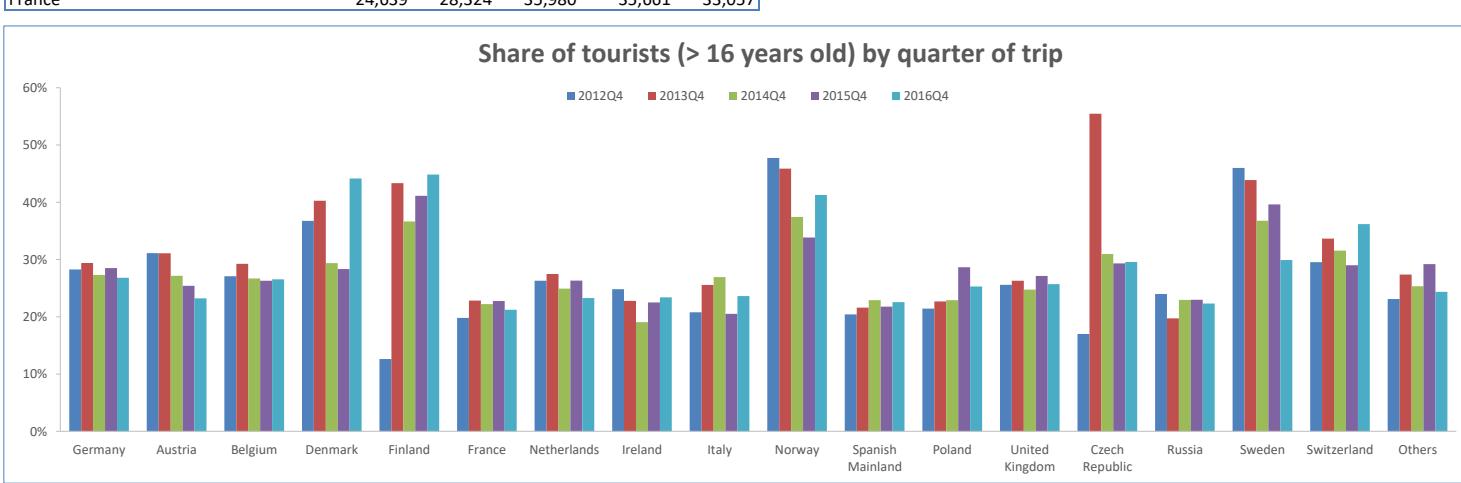


Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	67.8%	63.2%	66.1%	64.1%	62.5%
Recommendation by friends or relatives	35.5%	33.7%	34.3%	36.2%	35.5%
The Canary Islands television channel	0.3%	0.2%	0.3%	0.3%	0.3%
Other television or radio channels	0.7%	0.9%	1.0%	0.7%	0.7%
Information in the press/magazines/books	4.7%	3.5%	3.7%	3.2%	3.3%
Attendance at a tourism fair	0.7%	0.4%	0.8%	0.5%	0.3%
Tour Operator's brochure or catalogue	9.2%	7.8%	6.4%	5.7%	5.2%
Recommendation by Travel Agency	9.8%	7.9%	7.8%	7.2%	8.5%
Information obtained via the Internet	22.3%	21.9%	22.3%	20.8%	22.7%
Senior Tourism programme	0.4%	0.4%	0.1%	0.0%	0.2%
Others	8.2%	7.8%	6.5%	6.3%	6.0%

* Multi-choice question

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

■ 2012Q4 ■ 2013Q4 ■ 2014Q4 ■ 2015Q4 ■ 2016Q4



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.