

TOURIST PROFILE BY QUARTER OF TRIP (2018)

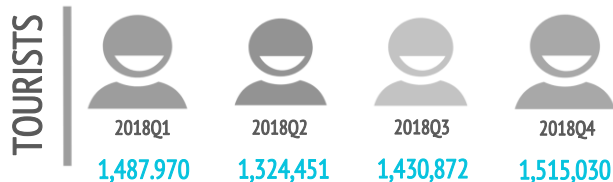
TENERIFE

How many are they and how much do they spend?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR) (*)	1.49	1.32	1.43	1.52	5.76
Tourist arrivals > 15 years old (EGT) (*)	1.33	1.14	1.17	1.35	4.99
- book holiday package (*)	0.66	0.65	0.67	0.70	2.68
- do not book holiday package (*)	0.67	0.49	0.50	0.65	2.31
- % tourists who book holiday package	49.5%	57.3%	57.1%	51.8%	53.7%

(*) Million of tourists



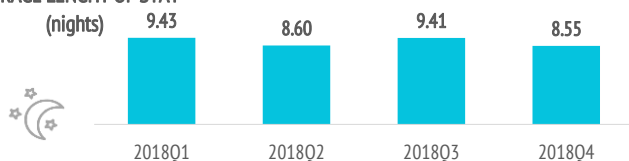
% TOURISTS WHO BOOK HOLIDAY PACKAGE



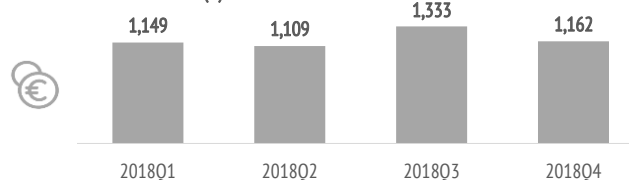
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	1,149	1,109	1,333	1,162	1,186
- book holiday package	1,300	1,207	1,476	1,353	1,335
- holiday package	1,037	948	1,173	1,092	1,064
- others	262	259	304	261	272
- do not book holiday package	1,001	978	1,141	956	1,014
- flight	265	269	356	278	289
- accommodation	315	322	356	317	326
- others	421	387	429	362	399
Average lenght of stay	9.43	8.60	9.41	8.55	9.00
- book holiday package	8.46	8.06	8.66	7.98	8.29
- do not book holiday package	10.37	9.32	10.40	9.16	9.82
Average daily expenditure (€)	139.6	144.3	154.5	151.4	147.4
- book holiday package	164.1	159.8	177.2	178.7	170.1
- do not book holiday package	115.6	123.5	124.3	122.2	121.0
Total turnover (> 15 years old) (€m)	1,529	1,261	1,560	1,572	5,922
- book holiday package	857	786	987	949	3,578
- do not book holiday package	673	475	573	623	2,344

AVERAGE LENGHT OF STAY

(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	80.9%	73.3%	71.0%	80.9%	76.8%
Safety	49.3%	47.9%	54.8%	51.6%	50.9%
Tranquility	42.3%	41.8%	42.3%	45.0%	42.9%
Accommodation supply	37.3%	41.2%	43.4%	40.2%	40.4%
Price	37.9%	37.4%	41.6%	36.7%	38.4%
Sea	36.7%	36.3%	40.8%	39.6%	38.4%
Landscapes	35.6%	34.7%	34.7%	35.6%	35.2%
European belonging	36.8%	32.1%	32.7%	38.0%	35.1%
Effortless trip	35.0%	32.5%	33.1%	35.1%	34.0%
Environment	33.5%	32.4%	34.9%	32.0%	33.2%
Beaches	28.1%	29.8%	35.0%	30.0%	30.6%
Fun possibilities	20.2%	25.7%	33.8%	22.1%	25.2%
Gastronomy	24.4%	23.2%	22.5%	24.1%	23.6%
Authenticity	18.4%	19.5%	21.6%	19.1%	19.6%
Exoticism	10.6%	11.5%	14.2%	11.1%	11.8%
Shopping	10.9%	11.7%	12.4%	10.1%	11.2%
Hiking trail network	13.2%	9.7%	7.3%	11.2%	10.5%
Nightlife	9.4%	9.4%	11.0%	7.2%	9.2%
Culture	7.4%	7.3%	9.2%	8.3%	8.0%
Historical heritage	7.5%	7.3%	8.2%	7.7%	7.7%

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 FUN POSSIBILITIES



What is the main motivation for their holidays?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	57.8%	52.8%	43.8%	52.8%	52.0%
Enjoy family time	11.1%	14.1%	19.7%	17.0%	15.4%
Have fun	7.4%	10.7%	15.2%	9.0%	10.4%
Explore the destination	19.5%	19.3%	19.6%	17.4%	18.9%
Practice their hobbies	1.4%	1.0%	0.4%	1.5%	1.1%
Other reasons	2.8%	2.1%	1.3%	2.2%	2.1%

How far in advance do they book their trip?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.9%	0.7%	1.1%	0.7%	0.9%
Between 1 and 30 days	27.6%	21.0%	20.3%	23.0%	23.1%
Between 1 and 2 months	24.7%	22.1%	17.8%	22.7%	21.9%
Between 3 and 6 months	31.2%	37.4%	32.2%	30.6%	32.7%
More than 6 months	15.6%	18.8%	28.7%	22.9%	21.4%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: 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.

TOURIST PROFILE BY QUARTER OF TRIP (2018)

TENERIFE



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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	51.3%	44.9%	41.6%	51.6%	47.6%
Friends or relatives	29.0%	29.7%	35.5%	30.7%	31.1%
Internet or social media	52.7%	55.3%	56.4%	53.8%	54.5%
Mass Media	1.6%	1.6%	1.7%	1.9%	1.7%
Travel guides and magazines	8.6%	9.8%	9.9%	8.7%	9.2%
Travel Blogs or Forums	5.0%	5.6%	6.8%	5.5%	5.7%
Travel TV Channels	0.5%	0.8%	0.6%	0.6%	0.6%
Tour Operator or Travel Agency	20.2%	22.6%	24.7%	22.4%	22.4%
Public administrations or similar	0.5%	0.6%	0.5%	0.6%	0.6%
Others	2.9%	2.4%	3.2%	2.2%	2.7%

* Multi-choice question

With whom did they book their flight and accommodation? 👁

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	48.4%	42.6%	39.5%	44.3%	43.9%
- Tour Operator or Travel Agency	51.6%	57.4%	60.5%	55.7%	56.1%
Accommodation					
- Directly with the accommodation	36.0%	32.6%	27.8%	32.9%	32.4%
- Tour Operator or Travel Agency	64.0%	67.4%	72.2%	67.1%	67.6%

Where do they stay? 🛏

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	10.5%	10.7%	10.5%	8.8%	10.1%
4* Hotel	36.4%	39.0%	39.2%	36.7%	37.7%
5* Hotel / 5* Luxury Hotel	7.9%	10.1%	9.5%	10.7%	9.5%
Aparthotel / Tourist Villa	21.7%	23.7%	20.3%	22.5%	22.0%
House/room rented in a private dwelling	7.5%	4.6%	5.6%	5.8%	5.9%
Private accommodation ⁽¹⁾	10.4%	6.8%	7.6%	7.4%	8.1%
Others (Cottage, cruise, camping,...)	5.6%	5.1%	7.3%	8.1%	6.6%

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

What do they book? 🍽

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	32.1%	25.8%	26.4%	31.3%	29.1%
Bed and Breakfast	15.9%	13.4%	12.2%	15.2%	14.3%
Half board	23.5%	25.8%	25.6%	23.9%	24.6%
Full board	3.2%	4.1%	2.9%	3.1%	3.3%
All inclusive	25.4%	30.8%	32.9%	26.5%	28.7%

29% of tourists book all inclusive.



25.4%
2018Q1



32.9%
2018Q3



30.8%
2018Q2



26.5%
2018Q4

Other expenses 📍

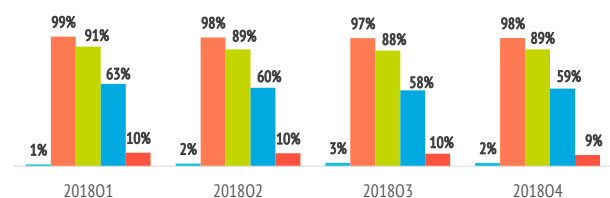
	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	65.5%	62.8%	60.1%	61.6%	62.6%
Supermarkets	57.1%	52.0%	55.0%	52.0%	54.1%
Car rental	23.9%	25.6%	26.8%	24.9%	25.2%
Organized excursions	18.1%	24.8%	28.7%	21.3%	23.0%
Taxi, transfer, chauffeur service	44.6%	48.6%	48.8%	44.6%	46.5%
Theme Parks	9.3%	13.1%	20.8%	12.7%	13.8%
Sport activities	4.3%	5.4%	7.3%	4.9%	5.4%
Museums	2.4%	2.1%	2.0%	2.0%	2.1%
Flights between islands	4.3%	4.7%	4.2%	4.3%	4.4%

Activities in the Canary Islands 🚶

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	1.3%	2.0%	2.5%	2.4%	2.0%
1 - 2 hours	7.6%	9.1%	9.5%	8.6%	8.7%
3 - 6 hours	28.4%	29.2%	30.2%	29.9%	29.4%
7 - 12 hours	52.4%	49.9%	48.1%	50.5%	50.3%
More than 12 hours	10.3%	9.8%	9.6%	8.5%	9.5%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

0 hours More than 1 hour More than 3 hours More than 7 hours More than 12 hours



Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	74.9%	74.3%	69.3%	72.1%	72.7%
Beach	53.5%	63.8%	74.2%	59.1%	62.2%
Swimming pool, hotel facilities	49.6%	62.6%	71.8%	57.4%	59.9%
Explore the island on their own	46.1%	46.1%	47.6%	45.6%	46.3%
Theme parks	16.7%	25.4%	38.2%	22.6%	25.3%
Taste Canarian gastronomy	25.7%	24.0%	25.7%	25.0%	25.1%
Organized excursions	15.6%	21.6%	26.5%	19.1%	20.5%
Nightlife / concerts / shows	16.4%	18.4%	20.1%	14.7%	17.2%
Sea excursions / whale watching	9.9%	15.9%	23.5%	13.2%	15.3%
Sport activities	12.3%	11.9%	14.1%	12.3%	12.6%
Nature activities	12.4%	12.0%	10.5%	11.6%	11.6%
Wineries/markets/popular festival	10.6%	8.5%	10.2%	8.2%	9.4%
Activities at sea	6.6%	9.4%	13.1%	8.3%	9.2%
Museums / exhibitions	7.3%	5.8%	6.6%	7.0%	6.7%
Beauty and health treatments	5.6%	4.9%	6.8%	5.9%	5.8%
Astronomical observation	3.2%	4.6%	5.6%	3.8%	4.3%

* Multi-choice question



TOURIST PROFILE BY QUARTER OF TRIP (2018)

TENERIFE



Which places do they visit in Tenerife?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Parque Nacional del Teide	34.5%	38.5%	41.3%	37.0%	37.7%
Santa Cruz (capital de la isla)	27.8%	27.5%	28.8%	24.9%	27.2%
La Laguna (Ciudad Patrimonio de la	19.1%	17.7%	17.6%	16.6%	17.7%
Acantilado de los Gigantes	16.2%	17.0%	21.2%	15.2%	17.3%
Garachico	13.9%	16.5%	18.0%	14.9%	15.7%
La Orotava	15.3%	16.2%	16.9%	13.2%	15.3%
Icod de los Vinos (Drago Milenario)	14.3%	15.7%	17.4%	12.5%	14.9%
Barranco de Masca	12.7%	11.8%	12.7%	10.8%	12.0%
Parque rural de Anaga	9.3%	10.0%	8.9%	9.4%	9.4%
Teno / Buenavista	8.1%	8.1%	7.0%	6.5%	7.4%
Barranco del Infierno	3.8%	3.1%	3.2%	2.6%	3.2%

4 in 10 tourists in Tenerife visit
Parque Nacional del Teide



2018Q1	34.5%
2018Q2	38.5%
2018Q3	41.3%
2018Q4	37.0%

Internet usage during their trip



Research

	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Tourist package	13.9%	15.9%	17.8%	16.3%	15.9%
- Flights	11.4%	13.9%	15.1%	12.7%	13.2%
- Accommodation	16.3%	17.8%	19.5%	17.1%	17.7%
- Transport	15.8%	14.9%	18.1%	16.1%	16.3%
- Restaurants	26.1%	27.2%	31.6%	28.8%	28.5%
- Excursions	24.0%	26.3%	31.0%	26.0%	26.9%
- Activities	29.2%	32.1%	34.8%	30.8%	31.8%

Book or purchase

	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Tourist package	38.0%	35.4%	34.2%	34.8%	35.6%
- Flights	67.7%	62.6%	63.4%	67.9%	65.6%
- Accommodation	55.8%	53.5%	53.6%	56.2%	54.8%
- Transport	44.8%	46.4%	44.2%	45.5%	45.2%
- Restaurants	12.4%	11.2%	11.5%	12.6%	12.0%
- Excursions	12.6%	14.9%	19.0%	14.4%	15.3%
- Activities	13.8%	15.0%	21.3%	16.0%	16.6%

* Multi-choise question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	11.6%	9.9%	7.5%	9.9%	9.8%
Used the Internet	88.4%	90.1%	92.5%	90.1%	90.2%
- Own Internet connection	37.6%	38.0%	42.5%	37.4%	38.8%
- Free Wifi connection	36.2%	37.8%	36.7%	39.1%	37.5%

Applications*

	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Search for locations or maps	61.7%	62.9%	67.2%	66.5%	64.6%
- Search for destination info	43.8%	44.3%	48.4%	47.5%	46.0%
- Share pictures or trip videos	53.1%	55.5%	58.9%	55.1%	55.6%
- Download tourist apps	6.4%	6.2%	5.8%	7.1%	6.4%
- Others	23.3%	20.0%	18.1%	20.3%	20.5%

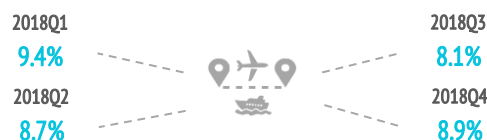
* Multi-choise question

How many islands do they visit during their trip?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	90.7%	90.6%	91.3%	91.9%	91.1%
Two islands	8.1%	8.5%	8.1%	7.3%	8.0%
Three or more islands	1.1%	0.9%	0.7%	0.9%	0.9%

% TOURISTS VISITING MORE THAN ONE ISLAND



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Average rating	8.53	8.59	8.62	8.59	8.58

Experience in the Canary Islands	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Worse or much worse than expected	3.0%	3.3%	3.5%	2.9%	3.2%
Lived up to expectations	59.4%	56.4%	49.9%	55.8%	55.5%
Better or much better than expected	37.6%	40.4%	46.6%	41.3%	41.3%

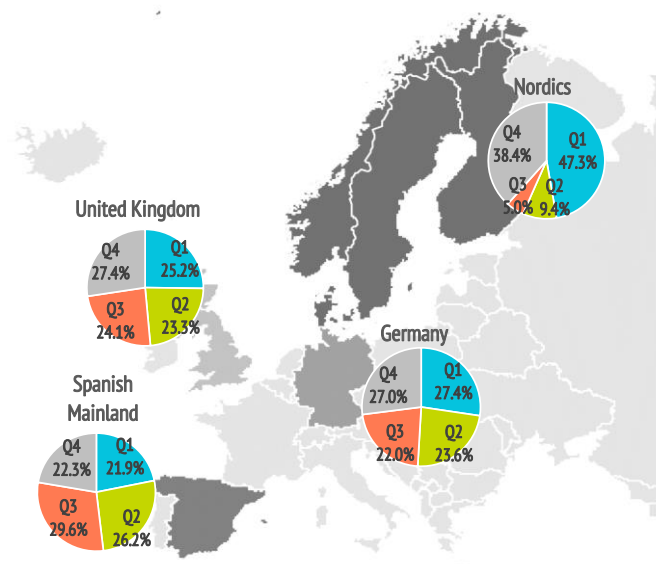
Future intentions (scale 1-10)	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Return to the Canary Islands	8.63	8.56	8.43	8.67	8.58
Recommend visiting the Canary Islands	8.85	8.82	8.81	8.92	8.85

How many are loyal to the Canary Islands?



	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Repeat tourists	65.5%	60.1%	53.8%	65.8%	61.6%
Repeat tourists (last 5 years)	10.0%	8.2%	6.3%	9.7%	8.6%
Repeat tourists (last 5 years)(5 or more visits)	70.9%	64.8%	58.6%	71.0%	66.6%
At least 10 previous visits	17.9%	14.4%	10.3%	17.7%	15.3%

TENERIFE: MAIN MARKETS % TOURISTS BY QUARTER OF TRIP



TOURIST PROFILE BY QUARTER OF TRIP (2018)

TENERIFE



Where are they from?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
United Kingdom	36.4%	39.4%	39.5%	38.8%	38.4%
Germany	14.0%	14.1%	12.8%	13.6%	13.6%
Spanish Mainland	10.8%	15.1%	16.6%	10.8%	13.2%
Italy	4.1%	3.7%	4.0%	3.8%	3.9%
Belgium	3.7%	3.8%	3.7%	3.9%	3.8%
France	3.6%	3.9%	3.5%	2.9%	3.5%
Netherlands	3.1%	3.3%	3.6%	2.8%	3.2%
Ireland	2.0%	2.9%	2.8%	2.3%	2.5%
Poland	1.9%	2.6%	2.6%	2.2%	2.3%
Sweden	4.3%	0.8%	0.5%	3.2%	2.3%
Switzerland	1.3%	1.6%	2.3%	1.7%	1.7%
Finland	2.8%	0.7%	0.0%	2.7%	1.6%
Denmark	2.9%	0.8%	0.4%	1.8%	1.6%
Norway	2.1%	0.6%	0.5%	1.9%	1.3%
Russia	1.2%	1.5%	1.4%	1.1%	1.3%
Austria	1.1%	0.6%	1.0%	1.3%	1.0%
Czech Republic	0.4%	0.2%	0.6%	0.5%	0.4%
Others	4.3%	4.6%	4.2%	4.4%	4.4%

Who do they come with?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	9.9%	7.9%	5.7%	8.6%	8.1%
Only with partner	52.4%	48.3%	37.8%	43.7%	45.7%
Only with children (< 13 years old)	4.3%	6.0%	9.5%	7.1%	6.7%
Partner + children (< 13 years old)	5.5%	7.5%	10.8%	7.5%	7.8%
Other relatives	7.4%	9.2%	12.1%	11.3%	10.0%
Friends	7.3%	7.5%	5.3%	5.2%	6.3%
Work colleagues	0.8%	0.4%	0.2%	0.3%	0.4%
Organized trip	0.2%	0.3%	0.2%	0.3%	0.2%
Other combinations ⁽¹⁾	12.2%	13.0%	18.3%	15.9%	14.8%

(1) Different situations have been isolated

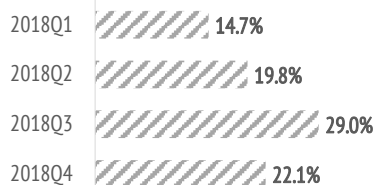
Tourists with children	14.7%	19.8%	29.0%	22.1%	21.2%
- Between 0 and 2 years old	2.1%	2.6%	1.9%	2.2%	2.2%
- Between 3 and 12 years old	10.5%	15.0%	25.3%	17.9%	17.0%
- Between 0 - 2 and 3-12 years	2.1%	2.1%	1.8%	2.0%	2.0%
Tourists without children	85.3%	80.2%	71.0%	77.9%	78.8%
Group composition:					
- 1 person	16.3%	12.8%	8.7%	12.8%	12.8%
- 2 people	58.2%	54.3%	44.4%	49.7%	51.8%
- 3 people	10.3%	13.4%	17.3%	14.0%	13.7%
- 4 or 5 people	12.1%	15.9%	24.2%	18.9%	17.7%
- 6 or more people	3.1%	3.5%	5.3%	4.6%	4.1%
Average group size:	2.37	2.54	2.89	2.69	2.62



21.2% of tourists travel with children.



(under the age of 13)



Who are they?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	46.6%	46.7%	43.3%	46.7%	45.9%
Women	53.4%	53.3%	56.7%	53.3%	54.1%
Age					
Average age (tourist > 15 years old)	47.4	43.6	39.1	46.4	44.3
Standard deviation	15.6	14.8	13.1	14.4	14.9
Age range (> 15 years old)					
16 - 24 years old	6.7%	9.4%	15.2%	6.2%	9.2%
25 - 30 years old	11.4%	14.2%	16.4%	10.4%	12.9%
31 - 45 years old	28.1%	33.2%	35.4%	30.1%	31.5%
46 - 60 years old	29.9%	28.0%	27.1%	34.4%	30.0%
Over 60 years old	23.8%	15.2%	5.9%	18.9%	16.3%
Occupation					
Salaried worker	50.8%	59.1%	65.1%	57.6%	57.9%
Self-employed	11.4%	10.2%	10.9%	12.9%	11.4%
Unemployed	1.4%	1.2%	1.5%	0.9%	1.3%
Business owner	9.8%	9.4%	8.4%	9.8%	9.4%
Student	3.1%	4.8%	7.7%	2.5%	4.4%
Retired	21.4%	13.5%	4.5%	14.5%	13.8%
Unpaid domestic work	1.3%	1.0%	1.1%	1.2%	1.1%
Others	0.7%	0.9%	0.7%	0.6%	0.7%
Annual household income level					
Less than €25,000	19.1%	20.2%	22.7%	15.5%	19.2%
€25,000 - €49,999	37.8%	37.7%	38.9%	35.3%	37.4%
€50,000 - €74,999	22.3%	24.3%	21.4%	25.1%	23.3%
More than €74,999	20.9%	17.9%	17.0%	24.1%	20.1%
Education level					
No studies	6.0%	6.1%	7.1%	5.5%	6.2%
Primary education	3.1%	2.2%	2.8%	2.4%	2.6%
Secondary education	22.9%	21.2%	22.1%	21.7%	22.0%
Higher education	68.0%	70.5%	68.0%	70.3%	69.2%



AVERAGE AGE
(> 15 years old)



% OF TOURISTS WITH INCOMES OVER
€74,999

2018Q1 2018Q2 2018Q3 2018Q4



% SALARIED WORKED TOURISTS



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.