

# Tourist profile trend (2017)

## TENERIFE



### How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR) (mill.)	4.66	4.96	4.99	5.58	5.93
Tourist arrivals (> 16 years old) (mill.)	4.00	4.19	4.25	4.89	5.14
Average daily expenditure (€)	129.58	131.98	138.98	136.77	141.57
. in their place of residence	90.63	90.97	96.82	96.08	99.85
. in the Canary Islands	38.95	41.01	42.16	40.69	41.73
Average lenght of stay	9.67	9.56	9.40	9.03	9.05
Turnover per tourist (€)	1,107	1,112	1,155	1,101	1,139
Total turnover (€m)	5,166	5,519	5,760	6,143	6,753
Tourist arrivals: year on year change	--	6.3%	0.5%	11.9%	6.3%
Turnover: year on year change	--	6.8%	4.4%	6.6%	9.9%

#### % tourists who pay in the Canary Islands:

##### Accommodation:

- Accommodation	16.6%	14.6%	14.6%	14.5%	14.6%
- Additional accommodation expenses	6.4%	6.7%	7.5%	6.4%	7.2%

##### Transport:

- Public transport	13.5%	13.3%	12.7%	11.6%	11.3%
- Taxi	21.4%	21.2%	19.0%	18.4%	18.3%
- Car rental	19.1%	18.8%	18.3%	17.3%	18.5%

##### Food and drink:

- Food purchases at supermarkets	52.9%	53.5%	54.2%	54.7%	54.7%
- Restaurants	53.5%	55.5%	54.1%	52.3%	54.1%

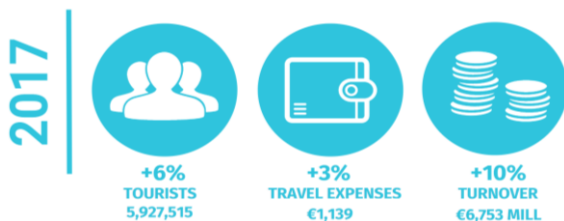
<b>Souvenirs:</b>	57.4%	58.3%	53.6%	51.7%	52.4%
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##### Leisure:

- Organized excursions	22.1%	20.7%	19.0%	18.3%	18.4%
- Leisure, amusement	13.7%	13.0%	12.5%	12.7%	12.1%
- Trip to other islands	2.1%	1.8%	1.4%	1.6%	1.6%
- Sporting activities	5.3%	5.5%	4.8%	5.0%	4.8%
- Cultural activities	3.3%	3.9%	3.7%	3.1%	3.0%
- Discos and disco-pubs	7.8%	7.8%	8.9%	6.4%	5.6%

##### Others:

- Wellness	5.6%	5.2%	4.7%	4.4%	4.0%
- Medical expenses	3.7%	3.8%	3.4%	3.5%	3.1%
- Other expenses	12.6%	9.8%	9.0%	8.2%	8.3%



### What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	12.4%	13.6%	14.0%	12.3%	12.6%
Flight and accommodation (room only)	24.6%	23.7%	25.6%	27.6%	27.0%
Flight and accommodation (B&B)	8.2%	9.2%	9.2%	9.3%	9.8%
Flight and accommodation (half board)	21.3%	21.5%	19.8%	21.0%	20.6%
Flight and accommodation (full board)	5.3%	4.9%	4.6%	4.2%	4.6%
Flight and accommodation (all inclusive)	28.0%	27.0%	26.8%	25.7%	25.5%
% Tourists using low-cost airlines	42.6%	43.8%	48.3%	53.2%	53.1%

#### Other expenses in their place of residence:

- Car rental	11.9%	11.4%	13.0%	13.6%	14.0%
- Sporting activities	4.7%	3.8%	4.4%	4.1%	4.1%
- Excursions	6.4%	6.4%	7.2%	7.0%	7.9%
- Trip to other islands	1.5%	1.5%	1.4%	1.2%	1.6%

### How do they book?



Accommodation booking	2013	2014	2015	2016	2017
<b>Tour Operator</b>	42.1%	43.2%	41.5%	39.7%	40.0%
- Tour Operator's website	75.4%	74.7%	79.3%	80.1%	80.8%
<b>Accommodation</b>	14.9%	14.8%	14.7%	16.1%	15.8%
- Accommodation's website	77.8%	79.0%	81.6%	82.8%	82.7%
<b>Travel agency (High street)</b>	20.1%	18.9%	18.5%	18.3%	18.1%
<b>Online Travel Agency (OTA)</b>	14.0%	13.6%	15.3%	17.6%	17.4%
<b>No need to book accommodation</b>	8.9%	9.4%	9.9%	8.5%	8.7%

Flight booking	2013	2014	2015	2016	2017
<b>Tour Operator</b>	44.6%	46.1%	44.4%	42.1%	43.5%
- Tour Operator's website	74.0%	74.6%	78.1%	78.3%	78.4%
<b>Airline</b>	25.9%	26.0%	27.6%	28.9%	28.5%
- Airline's website	95.4%	96.1%	95.8%	96.3%	97.5%
<b>Travel agency (High street)</b>	19.0%	17.6%	17.0%	17.0%	16.4%
<b>Online Travel Agency (OTA)</b>	10.5%	10.3%	11.0%	12.0%	11.6%

### How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.5%	0.6%	0.8%	0.7%	0.7%
Between 2 and 7 days	8.2%	8.2%	7.2%	6.2%	5.8%
Between 8 and 15 days	10.2%	9.1%	8.6%	8.0%	7.0%
Between 16 and 30 days	16.5%	15.5%	14.6%	15.3%	13.8%
Between 31 and 90 days	31.0%	32.0%	33.1%	33.7%	33.9%
More than 90 days	33.6%	34.5%	35.8%	36.2%	38.9%

### Who are they?



Gender	2013	2014	2015	2016	2017
Men	45.8%	46.7%	49.0%	48.1%	47.6%
Women	54.2%	53.3%	51.0%	51.9%	52.4%

#### Age

Average age (tourists > 16 years old)	43.7	43.6	42.9	43.1	44.9
Standard deviation	14.3	14.2	14.2	14.4	15.1

#### Age range (> 16 years old)

16-24 years old	9.1%	9.8%	10.6%	10.3%	9.9%
25-30 years old	13.0%	13.4%	14.0%	13.7%	12.1%
31-45 years old	33.4%	32.0%	32.2%	32.9%	29.7%
46-60 years old	30.2%	31.7%	30.9%	29.5%	30.8%
Over 60 years old	14.3%	13.1%	12.3%	13.6%	17.5%

#### Occupation

Business owner or self-employed	24.5%	26.5%	26.6%	27.6%	26.6%
Upper/Middle management employee	35.3%	35.6%	35.6%	35.3%	33.9%
Auxiliary level employee	18.6%	17.9%	18.5%	17.3%	16.7%
Students	5.7%	5.1%	6.3%	5.9%	5.7%
Retired	13.1%	12.1%	10.3%	11.1%	14.7%
Unemployed / unpaid dom. work	2.8%	2.7%	2.8%	2.8%	2.5%

#### Annual household income level

€12,000 - €24,000	21.2%	20.3%	20.2%	20.3%	20.7%
€24,001 - €36,000	20.8%	20.0%	19.8%	19.8%	19.8%
€36,001 - €48,000	16.3%	16.3%	16.5%	16.2%	15.1%
€48,001 - €60,000	13.9%	14.0%	14.0%	13.8%	14.1%
€60,001 - €72,000	7.7%	8.7%	8.3%	9.0%	8.8%
€72,001 - €84,000	5.3%	5.2%	5.5%	6.0%	6.1%
More than €84,000	14.8%	15.5%	15.7%	14.9%	15.5%

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#### Which island do they choose?



Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	1,820,148	1,911,659	2,033,971	2,328,674	2,488,213
- Fuerteventura	1,514,524	1,595,143	1,668,484	1,914,107	1,938,908
- Gran Canaria	2,876,750	3,001,310	3,104,724	3,654,806	3,900,824
- Tenerife	3,996,638	4,193,228	4,249,936	4,885,901	5,144,415
- La Palma	143,472	138,916	163,425	221,541	277,952

#### Where do they stay?



	2013	2014	2015	2016	2017
5* Hotel	9.5%	9.3%	9.4%	9.0%	8.8%
4* Hotel	40.1%	40.1%	39.1%	39.9%	39.3%
1-2-3* Hotel	12.5%	12.8%	12.0%	11.8%	12.0%
Apartment	27.2%	26.4%	27.5%	29.9%	29.4%
Property (privately-owned, friends, family)	8.0%	9.1%	9.3%	6.8%	7.0%
Others	2.7%	2.4%	2.7%	2.6%	3.6%

#### Who do they come with?



	2013	2014	2015	2016	2017
Unaccompanied	9.2%	9.0%	9.1%	8.9%	9.0%
Only with partner	46.1%	46.8%	46.2%	43.6%	44.0%
Only with children (under the age of 13)	1.7%	1.5%	1.5%	1.7%	2.0%
Partner + children (under the age of 13)	11.6%	12.3%	11.7%	13.3%	12.4%
Other relatives	6.9%	6.2%	6.6%	6.2%	6.3%
Friends	6.2%	6.5%	5.7%	6.6%	6.2%
Work colleagues	0.3%	0.4%	0.4%	0.3%	0.3%
Other combinations <sup>(1)</sup>	18.1%	17.3%	18.8%	19.4%	19.8%

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

#### How do they rate the Canary Islands?



	2013	2014	2015	2016	2017
Impression of their stay					
Good or very good (% tourists)	92.7%	93.5%	93.3%	94.2%	93.8%
Average rating (scale 1-10)	8.77	8.83	8.84	8.91	8.93

#### How many are loyal to the Canary Islands?



Repeat tourists (previous visits)	2013	2014	2015	2016	2017
At least 1 visit to the island	54.5%	55.2%	55.0%	54.0%	54.5%
At least 10 visits to the island	7.2%	7.0%	6.8%	6.1%	7.0%
At least 1 visit to the Canary Islands	74.1%	74.6%	73.9%	73.5%	73.3%
At least 10 visits to the Canary Islands	16.6%	15.4%	15.4%	14.2%	15.1%

#### Where are they from?



Tourists (> 16 years old)	2013	2014	2015	2016	2017
United Kingdom	36.5%	37.5%	38.5%	39.3%	39.2%
Germany	14.1%	13.5%	13.6%	13.7%	13.8%
Spanish Mainland	12.7%	11.5%	11.9%	12.4%	12.4%
Italy	2.4%	2.9%	3.7%	3.9%	4.0%
Belgium	3.5%	3.8%	4.1%	3.9%	3.8%
Netherlands	3.1%	3.2%	3.1%	3.4%	3.2%
France	3.1%	3.9%	3.7%	3.2%	3.1%
Sweden	4.3%	3.5%	3.1%	2.7%	2.5%
Ireland	2.3%	2.3%	2.4%	2.3%	2.3%
Others	17.9%	17.9%	16.0%	15.1%	15.6%

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.

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	17.6%	17.6%	18.1%	17.9%	18.1%
- Fuerteventura	14.6%	14.7%	14.9%	14.7%	14.1%
- Gran Canaria	27.8%	27.7%	27.7%	28.1%	28.4%
- Tenerife	38.6%	38.7%	37.9%	37.6%	37.4%
- La Palma	1.4%	1.3%	1.5%	1.7%	2.0%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	90.0%	89.7%	88.5%	88.9%	87.5%
Tranquillity/rest/relaxation	34.1%	33.1%	32.3%	30.7%	30.2%
Beaches	24.4%	24.0%	24.3%	25.9%	27.0%
Scenery	23.7%	25.5%	26.9%	25.5%	26.9%
Visiting new places	15.2%	15.2%	14.7%	15.1%	14.9%
Price	14.4%	14.6%	13.3%	12.8%	11.4%
Ease of travel	9.6%	8.7%	8.1%	8.4%	9.0%
Security	4.9%	4.8%	6.4%	9.1%	8.0%
Suitable destination for children	8.2%	8.1%	7.5%	8.1%	7.7%
Theme parks	6.1%	6.4%	7.1%	7.2%	7.4%
Quality of the environment	6.8%	6.7%	7.3%	6.6%	6.5%
Active tourism	5.1%	5.9%	6.0%	6.0%	6.4%
Nightlife/fun	5.3%	5.4%	5.4%	4.8%	4.7%
Shopping	3.5%	3.5%	3.9%	3.3%	3.2%
Culture	2.8%	2.5%	3.0%	2.7%	2.7%
Nautical activities	1.7%	1.9%	1.8%	1.9%	1.7%

\* Multi-choice question

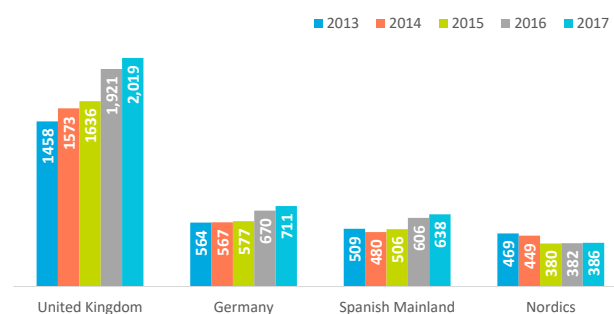
#### What did motivate them to come?



Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	62.3%	62.3%	61.6%	60.7%	60.7%
Recommendation by friends/relatives	35.7%	35.8%	37.1%	37.1%	37.2%
The Canary Islands television channel	0.3%	0.4%	0.4%	0.3%	0.4%
Other television or radio channels	1.0%	1.0%	0.8%	0.8%	0.9%
Information in press/magazines/books	3.9%	3.6%	3.6%	3.5%	3.8%
Attendance at a tourism fair	0.6%	0.6%	0.6%	0.5%	0.4%
Tour Operator's brochure or catalogue	8.9%	7.9%	6.6%	5.8%	5.8%
Recommendation by Travel Agency	8.9%	8.3%	7.9%	7.9%	7.8%
Information obtained via the Internet	23.6%	23.5%	22.3%	23.2%	22.2%
Senior Tourism programme	0.5%	0.3%	0.2%	0.2%	0.4%
Others	7.0%	6.5%	6.1%	6.1%	6.0%

\* Multi-choice question

#### Main markets: tourist arrivals (thousands)



Tourists over 16 years old.