

Tourist profile trend (2017)

Tenerife: Fourth Quarter



How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR) (mill.)	1.30	1.30	1.32	1.46	1.51
Tourist arrivals (> 16 years old) (mill.)	1.12	1.09	1.14	1.28	1.36
Average daily expenditure (€)	137.25	137.47	142.76	144.20	150.24
. in their place of residence	97.15	95.63	99.57	102.22	109.40
. in the Canary Islands	40.10	41.83	43.18	41.98	40.84
Average lenght of stay	9.01	9.00	8.84	8.47	8.73
Turnover per tourist (€)	1,108	1,096	1,132	1,110	1,177
Total turnover (> 16 years old) (€m)	1,440	1,426	1,493	1,616	1,772
Share of annual tourist	27.8%	26.2%	26.5%	26.1%	25.4%
Share of annual turnover	27.9%	25.8%	25.9%	26.3%	26.2%

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	16.6%	12.8%	15.2%	14.0%	14.6%
- Additional accommodation expenses	4.7%	7.6%	7.3%	5.4%	7.6%

Transport:

- Public transport	14.0%	11.5%	11.8%	11.0%	11.9%
- Taxi	21.9%	18.8%	18.0%	17.8%	17.8%
- Car rental	18.0%	19.1%	15.8%	17.1%	17.9%

Food and drink:

- Food purchases at supermarkets	53.5%	52.9%	52.2%	56.9%	53.9%
- Restaurants	54.7%	57.3%	55.3%	52.5%	55.0%

Souvenirs:	58.4%	57.3%	50.7%	52.0%	52.2%
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Leisure:

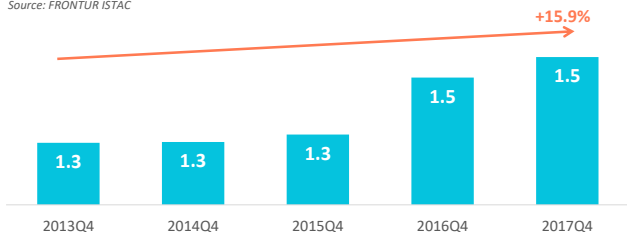
- Organized excursions	22.4%	18.9%	16.9%	15.9%	17.2%
- Leisure, amusement	13.3%	12.5%	10.8%	11.6%	11.5%
- Trip to other islands	1.9%	1.6%	1.3%	1.7%	1.7%
- Sporting activities	5.9%	5.6%	4.2%	4.2%	5.0%
- Cultural activities	3.8%	2.9%	3.8%	2.5%	3.1%
- Discos and disco-pubs	7.2%	6.3%	7.2%	5.6%	4.1%

Others:

- Wellness	5.6%	5.0%	4.7%	4.1%	4.4%
- Medical expenses	3.2%	3.0%	3.0%	3.3%	3.2%
- Other expenses	11.4%	9.2%	8.6%	8.0%	7.5%

TOURIST ARRIVALS (million)

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	11.6%	13.4%	13.7%	12.2%	11.5%
Flight and accommodation (room only)	25.2%	24.6%	26.7%	28.2%	28.2%
Flight and accommodation (B&B)	9.8%	10.9%	10.2%	10.6%	9.7%
Flight and accommodation (half board)	20.7%	20.5%	19.5%	20.6%	20.5%
Flight and accommodation (full board)	4.5%	4.5%	4.4%	4.2%	5.2%
Flight and accommodation (all inclusive)	28.1%	26.0%	25.4%	24.3%	24.8%
% Tourists using low-cost airlines	43.4%	43.4%	49.6%	51.2%	52.0%

Other expenses in their place of residence:

- Car rental	12.8%	12.5%	12.5%	13.9%	13.5%
- Sporting activities	4.5%	3.4%	3.9%	3.9%	4.0%
- Excursions	6.7%	6.0%	6.8%	6.8%	7.4%
- Trip to other islands	1.4%	1.5%	1.2%	1.1%	2.2%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	43.2%	43.9%	43.5%	39.4%	41.8%
- Tour Operator's website	78.2%	75.0%	80.7%	80.8%	80.6%
Accommodation	14.5%	15.8%	13.5%	16.6%	15.4%
- Accommodation's website	79.2%	80.0%	82.9%	82.4%	81.3%
Travel agency (High street)	18.9%	17.5%	17.1%	17.4%	17.4%
Online Travel Agency (OTA)	14.9%	14.1%	15.7%	18.1%	17.2%
No need to book accommodation	8.5%	8.7%	10.1%	8.5%	8.1%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	46.4%	46.0%	46.3%	44.0%	45.0%
- Tour Operator's website	75.2%	75.8%	79.4%	78.5%	77.2%
Airline	26.3%	26.4%	27.5%	28.3%	28.7%
- Airline's website	96.6%	96.2%	95.0%	95.7%	97.1%
Travel agency (High street)	17.4%	16.9%	15.6%	16.5%	15.7%
Online Travel Agency (OTA)	9.9%	10.7%	10.6%	11.2%	10.6%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.6%	0.5%	0.7%	0.6%	0.4%
Between 2 and 7 days	8.0%	9.0%	7.2%	5.8%	4.6%
Between 8 and 15 days	9.1%	9.3%	8.8%	7.2%	6.3%
Between 16 and 30 days	13.5%	15.4%	15.4%	15.8%	12.4%
Between 31 and 90 days	33.3%	33.1%	35.2%	35.0%	35.7%
More than 90 days	35.4%	32.7%	32.7%	35.5%	40.5%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	46.7%	46.1%	48.8%	49.3%	48.7%
Women	53.3%	53.9%	51.2%	50.7%	51.3%

Age

Average age (tourists > 16 years old)	44.5	44.9	44.4	44.4	47.7
Standard deviation	13.4	13.3	14.2	14.1	14.8

Age range (> 16 years old)

16-24 years old	6.4%	6.0%	7.8%	7.6%	6.5%
25-30 years old	12.0%	11.3%	13.9%	12.3%	9.3%
31-45 years old	34.9%	34.1%	30.9%	33.7%	28.2%
46-60 years old	33.5%	35.7%	33.3%	31.2%	33.7%
Over 60 years old	13.2%	12.8%	14.1%	15.2%	22.3%

Occupation

Business owner or self-employed	25.2%	27.7%	26.7%	27.9%	25.3%
Upper/Middle management employee	38.0%	36.6%	35.4%	37.5%	33.3%
Auxiliary level employee	18.4%	17.8%	17.9%	16.2%	16.4%
Students	3.4%	3.1%	4.5%	4.3%	3.7%
Retired	12.1%	11.9%	12.6%	11.5%	18.7%
Unemployed / unpaid dom. work	2.9%	2.9%	2.9%	2.7%	2.7%

Annual household income level

€12,000 - €24,000	19.3%	18.4%	18.4%	19.9%	19.5%
€24,001 - €36,000	18.2%	18.4%	19.5%	19.6%	19.2%
€36,001 - €48,000	17.4%	16.1%	16.1%	15.4%	14.8%
€48,001 - €60,000	13.7%	15.2%	13.9%	14.0%	14.0%
€60,001 - €72,000	8.4%	8.9%	9.2%	9.0%	9.1%
€72,001 - €84,000	6.2%	5.1%	5.2%	6.1%	6.2%
More than €84,000	16.7%	17.9%	17.8%	16.0%	17.1%

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Which island do they choose?



Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	482,417	467,397	527,062	600,909	658,457
- Fuerteventura	407,337	398,938	437,284	495,222	513,386
- Gran Canaria	901,778	863,399	951,656	1,064,140	1,108,297
- Tenerife	1,123,476	1,092,650	1,144,231	1,280,669	1,357,305
- La Palma	35,785	37,346	45,080	65,961	86,566

Where do they stay?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	9.7%	9.2%	10.1%	8.5%	8.7%
4* Hotel	38.6%	39.6%	38.3%	39.7%	37.7%
1-2-3* Hotel	12.4%	12.6%	12.0%	11.3%	12.9%
Apartment	29.0%	28.2%	28.1%	30.9%	29.9%
Property (privately-owned, friends, family)	7.7%	8.2%	9.6%	6.8%	5.7%
Others	2.6%	2.2%	1.9%	2.7%	5.1%

Who do they come with?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	10.1%	9.1%	10.4%	8.9%	8.2%
Only with partner	45.7%	44.4%	47.0%	41.2%	44.5%
Only with children (under the age of 13)	1.5%	1.4%	1.3%	1.7%	1.7%
Partner + children (under the age of 13)	9.7%	14.2%	9.7%	13.8%	11.7%
Other relatives	7.7%	6.9%	7.1%	6.8%	6.5%
Friends	4.9%	5.0%	4.9%	5.2%	5.2%
Work colleagues	0.2%	0.6%	0.4%	0.4%	0.2%
Other combinations ⁽¹⁾	20.3%	18.4%	19.2%	22.0%	22.0%

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

How do they rate the Canary Islands?



Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	92.0%	93.7%	94.2%	92.9%	93.4%
Average rating (scale 1-10)	8.75	8.82	8.92	8.83	8.91

How many are loyal to the Canary Islands?



Repeat tourists (previous visits)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 visit to the island	55.4%	58.3%	56.8%	56.4%	55.6%
At least 10 visits to the island	6.8%	7.5%	6.7%	6.6%	7.0%
At least 1 visit to the Canary Islands	75.9%	77.7%	75.9%	75.7%	74.7%
At least 10 visits to the Canary Islands	17.1%	16.1%	17.0%	15.8%	16.2%

Where are they from?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
United Kingdom	34.1%	35.6%	38.8%	38.6%	37.1%
Germany	14.8%	14.2%	14.4%	14.0%	16.1%
Spanish Mainland	9.8%	10.1%	9.6%	10.7%	10.0%
Sweden	6.7%	5.0%	4.5%	3.1%	3.9%
Belgium	3.6%	3.9%	4.0%	4.0%	3.8%
Italy	2.2%	3.0%	2.9%	3.5%	3.4%
Netherlands	3.1%	3.0%	3.0%	3.0%	3.2%
France	2.5%	3.3%	3.1%	2.6%	2.7%
Finland	4.6%	3.5%	2.9%	3.2%	2.5%
Others	18.6%	18.4%	16.8%	17.4%	17.3%

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	16.3%	16.3%	17.0%	17.1%	17.7%
- Fuerteventura	13.8%	14.0%	14.1%	14.1%	13.8%
- Gran Canaria	30.6%	30.2%	30.6%	30.3%	29.8%
- Tenerife	38.1%	38.2%	36.8%	36.5%	36.4%
- La Palma	1.2%	1.3%	1.5%	1.9%	2.3%

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	90.8%	91.5%	90.6%	91.1%	90.5%
Tranquillity/rest/relaxation	35.0%	34.9%	32.7%	31.9%	31.9%
Beaches	22.8%	25.1%	26.7%	24.0%	27.5%
Scenery	23.2%	23.2%	25.3%	25.1%	26.9%
Visiting new places	14.4%	13.0%	12.2%	14.1%	14.2%
Ease of travel	8.6%	9.6%	8.5%	9.3%	9.6%
Price	13.6%	12.6%	12.0%	11.9%	9.0%
Active tourism	5.7%	6.7%	6.0%	5.7%	7.8%
Suitable destination for children	7.9%	8.8%	6.8%	8.4%	7.6%
Security	5.6%	5.1%	8.4%	9.1%	7.5%
Quality of the environment	6.7%	6.8%	6.8%	6.5%	5.9%
Theme parks	5.0%	5.5%	5.7%	5.8%	5.8%
Nightlife/fun	4.1%	4.5%	4.3%	3.9%	3.3%
Shopping	4.0%	3.6%	4.0%	4.0%	3.2%
Culture	2.8%	2.3%	2.4%	2.2%	2.2%
Nautical activities	1.6%	1.7%	1.6%	1.7%	1.8%

* Multi-choice question

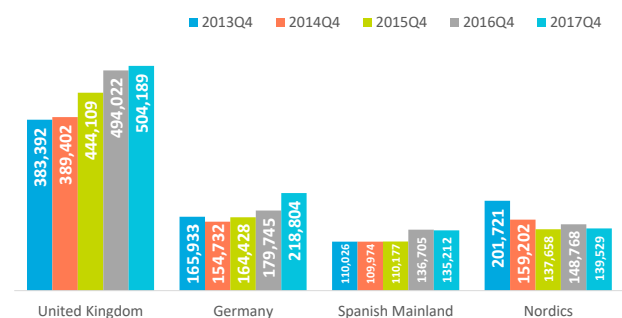
What did motivate them to come?



Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	63.2%	66.1%	64.1%	62.5%	61.9%
Recommendation by friends/relatives	33.7%	34.3%	36.2%	35.5%	36.1%
The Canary Islands television channel	0.2%	0.3%	0.3%	0.3%	0.3%
Other television or radio channels	0.9%	1.0%	0.7%	0.7%	0.6%
Information in press/magazines/books	3.5%	3.7%	3.2%	3.3%	3.8%
Attendance at a tourism fair	0.4%	0.8%	0.5%	0.3%	0.3%
Tour Operator's brochure or catalogue	7.8%	6.4%	5.7%	5.2%	6.8%
Recommendation by Travel Agency	7.9%	7.8%	7.2%	8.5%	7.6%
Information obtained via the Internet	21.9%	22.3%	20.8%	22.7%	21.3%
Senior Tourism programme	0.4%	0.1%	0.0%	0.2%	0.5%
Others	7.8%	6.5%	6.3%	6.0%	7.0%

* Multi-choice question

Main markets: tourist arrivals



Tourists over 16 years old.

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.