

Tourist profile trend (2016)

Tenerife: First Quarter



How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	1,085,591	1,059,587	1,150,121	1,179,865	1,261,312
Average daily expenditure (€)	130.37	132.29	130.72	137.77	139.42
. in their place of residence	91.27	93.07	89.49	96.03	98.67
. in the Canary Islands	39.10	39.22	41.23	41.74	40.75
Average length of stay	10.33	10.02	10.52	10.19	9.28
Turnover per tourist (€)	1,181	1,158	1,171	1,200	1,137
Total turnover (> 16 years old) (€m)	1,282	1,227	1,347	1,415	1,434
Share of total turnover	29.6%	27.7%	28.9%	28.8%	26.6%
Share of total tourist	27.8%	26.5%	27.4%	27.8%	25.8%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	50.93	50.43	51.93	55.85	52.54
- Accommodation	44.92	45.17	47.06	47.93	43.31
- Additional accommodation expenses	6.01	5.26	4.87	7.92	9.24
Transport:	30.52	29.43	29.86	30.98	26.11
- Public transport	4.86	5.52	5.54	5.58	4.71
- Taxi	8.80	7.84	7.69	7.00	6.43
- Car rental	16.86	16.07	16.64	18.40	14.97
Food and drink:	152.49	156.13	179.85	183.40	164.67
- Food purchases at supermarkets	60.80	61.97	73.00	85.56	71.73
- Restaurants	91.69	94.15	106.84	97.83	92.94
Souvenirs:	63.52	61.95	68.78	58.91	50.01
Leisure:	40.54	37.15	35.15	39.37	33.78
- Organized excursions	16.96	13.67	15.12	15.24	13.27
- Leisure, amusement	6.14	5.70	5.78	4.91	4.84
- Trip to other islands	2.03	1.96	1.37	1.26	0.96
- Sporting activities	4.96	5.23	4.63	5.94	4.52
- Cultural activities	1.84	1.52	1.97	1.94	1.73
- Discos and disco-pubs	8.61	9.08	6.28	10.09	8.44
Others:	30.48	38.45	31.16	17.55	16.23
- Wellness	2.22	3.15	3.46	2.94	2.77
- Medical expenses	2.68	2.30	1.97	1.90	1.14
- Other expenses	25.58	33.01	25.73	12.71	12.32

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.5%	0.2%	0.7%	0.8%	0.9%
Between 2 and 7 days	7.6%	8.4%	7.4%	7.1%	6.9%
Between 8 and 15 days	9.3%	11.3%	8.6%	8.7%	9.2%
Between 16 and 30 days	16.8%	19.5%	16.5%	15.2%	16.0%
Between 31 and 90 days	35.4%	30.4%	33.0%	34.3%	35.9%
More than 90 days	30.3%	30.2%	33.8%	33.9%	31.2%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	13.2%	11.5%	15.8%	16.1%	13.8%
Flight and accommodation (room only)	25.3%	27.2%	25.4%	27.0%	28.8%
Flight and accommodation (B&B)	8.2%	9.2%	10.6%	9.9%	10.0%
Flight and accommodation (half board)	22.3%	20.9%	21.1%	18.8%	20.0%
Flight and accommodation (full board)	6.7%	6.7%	4.7%	4.5%	4.1%
Flight and accommodation (all inclusive)	24.2%	24.5%	22.3%	23.7%	23.4%
% Tourists using low-cost airlines	32.8%	37.9%	41.2%	42.5%	51.4%
Other expenses in their place of residence:					
- Car rental	10.3%	11.9%	11.4%	13.5%	12.5%
- Sporting activities	3.6%	5.4%	3.6%	4.3%	4.2%
- Excursions	5.1%	5.3%	5.7%	6.5%	6.2%
- Trip to other islands	1.4%	2.4%	2.0%	1.7%	1.6%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	51.5%	46.9%	46.0%	44.1%	45.3%
- Tour Operator's website	70.9%	75.1%	75.8%	77.9%	80.0%
Accommodation	12.2%	15.2%	15.1%	14.9%	13.8%
- Accommodation's website	73.3%	74.6%	75.6%	81.3%	82.4%
Travel agency (High street)	16.6%	17.0%	15.7%	15.4%	14.5%
Online Travel Agency (OTA)	9.8%	13.3%	12.1%	14.4%	16.5%
No need to book accommodation	10.0%	7.6%	11.1%	11.2%	9.9%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	59.9%	49.3%	49.6%	46.9%	46.1%
- Tour Operator's website	70.6%	75.9%	76.8%	78.5%	80.2%
Airline	17.3%	24.0%	26.9%	27.8%	28.3%
- Airline's website	96.2%	93.8%	96.7%	96.8%	96.3%
Travel agency (High street)	14.8%	16.8%	14.9%	14.4%	13.8%
Online Travel Agency (OTA)	8.0%	9.9%	8.6%	10.9%	11.8%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	6.7%	8.9%	9.0%	8.4%	8.6%
4* Hotel	41.5%	39.1%	37.1%	35.9%	38.5%
1-2-3* Hotel	12.0%	13.9%	13.3%	12.0%	12.5%
Apartment	28.7%	27.6%	27.8%	28.5%	29.8%
Property (privately-owned, friends, family)	6.8%	6.2%	10.0%	10.7%	7.8%
Others	4.2%	4.3%	2.9%	4.6%	2.8%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	48.1%	47.7%	49.1%	50.3%	47.5%
Percentage of women	51.9%	52.3%	50.9%	49.7%	52.5%

Age					
Average age (tourists > 16 years old)	49.7	47.7	47.7	47.2	45.5
Standard deviation	14.9	14.9	14.7	14.6	14.9

Age range (> 16 years old)					
16-24 years old	5.6%	5.8%	6.2%	6.7%	8.1%
25-30 years old	7.7%	10.3%	10.3%	9.9%	11.8%
31-45 years old	24.9%	28.2%	27.1%	28.1%	30.6%
46-60 years old	35.1%	31.7%	34.4%	35.0%	30.9%
Over 60 years old	26.6%	24.0%	22.0%	20.4%	18.6%

Occupation					
Business owner or self-employed	23.0%	24.4%	26.9%	25.8%	28.3%
Upper/Middle management employee	31.2%	30.8%	32.5%	35.1%	33.4%
Auxiliary level employee	13.4%	15.5%	14.5%	16.3%	15.2%
Students	3.7%	5.2%	4.1%	4.3%	5.3%
Retired	25.8%	21.9%	19.9%	16.6%	15.4%
Unemployed / unpaid dom. work	2.9%	2.1%	2.1%	1.9%	2.5%

Annual household income level					
€12,000 - €24,000	18.7%	18.6%	18.2%	17.7%	16.6%
€24,001 - €36,000	19.6%	21.4%	18.7%	18.9%	18.5%
€36,001 - €48,000	17.5%	14.6%	17.1%	17.2%	17.7%
€48,001 - €60,000	14.0%	14.7%	14.8%	15.9%	13.7%
€60,001 - €72,000	10.0%	7.1%	9.2%	8.6%	9.3%
€72,001 - €84,000	6.2%	5.3%	5.3%	5.8%	6.5%
More than €84,000	14.0%	18.3%	16.7%	16.0%	17.6%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	427,944	429,077	466,498	483,781	560,886
- Fuerteventura	372,165	366,481	363,967	394,726	473,171
- Gran Canaria	828,230	819,171	895,237	871,881	991,937
- Tenerife	1,085,591	1,059,587	1,150,121	1,179,865	1,261,312
- La Palma	40,340	48,806	36,356	42,548	61,898

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	15.5%	15.8%	16.0%	16.3%	16.7%
- Fuerteventura	13.5%	13.5%	12.5%	13.3%	14.1%
- Gran Canaria	30.1%	30.1%	30.7%	29.3%	29.6%
- Tenerife	39.4%	38.9%	39.5%	39.7%	37.7%
- La Palma	1.5%	1.8%	1.2%	1.4%	1.8%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	8.2%	8.6%	10.3%	9.7%	10.9%
Only with partner	51.9%	51.7%	52.7%	51.1%	47.0%
Only with children (under the age of 13)	0.8%	1.2%	1.2%	0.8%	1.4%
Partner + children (under the age of 13)	9.6%	10.2%	8.1%	9.0%	10.6%
Other relatives	5.3%	6.1%	5.5%	5.6%	5.9%
Friends	6.3%	6.6%	6.7%	6.5%	7.5%
Work colleagues	0.3%	0.3%	0.3%	0.3%	0.4%
Other combinations ⁽¹⁾	17.5%	15.3%	15.3%	16.9%	16.4%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	92.1%	93.0%	93.6%	90.8%	94.7%
Average rating (scale 1-10)	8.68	8.79	8.80	8.64	8.93

How many are loyal to the destination?

Repeat tourists of the island	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	65.9%	61.0%	60.6%	60.7%	58.1%
In love (at least 10 previous visits)	8.8%	9.3%	8.5%	8.7%	7.4%

Where are they from?



Ten main source markets	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
United Kingdom	357,392	338,409	368,720	400,682	450,517
Germany	176,382	174,974	172,854	181,653	187,761
Spanish Mainland	115,729	114,095	101,097	107,442	121,870
Sweden	61,076	73,078	74,752	63,811	81,824
Italy	28,802	23,573	31,261	47,454	48,831
Belgium	41,326	35,115	44,446	46,418	47,621
Netherlands	33,561	33,651	38,284	32,093	41,116
Finland	52,830	62,670	59,174	43,213	40,614
Denmark	41,321	52,797	45,322	40,272	40,358
France	34,771	30,355	39,651	41,371	40,040

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	93.1%	93.2%	91.4%	90.2%	91.1%
Tranquillity/rest/relaxation	38.1%	35.9%	34.4%	34.8%	31.5%
Scenery	24.8%	24.9%	25.6%	28.1%	26.7%
Beaches	19.0%	22.0%	21.4%	21.1%	23.3%
Visiting new places	14.5%	12.6%	13.0%	12.9%	12.3%
Price	14.1%	13.8%	13.3%	12.0%	12.0%
Ease of travel	12.3%	12.5%	10.4%	8.8%	8.7%
Security	6.1%	5.1%	5.7%	6.0%	8.7%
Active tourism	5.5%	5.4%	6.5%	7.0%	7.0%
Quality of the environment	7.2%	7.1%	6.7%	7.1%	6.8%
Suitable destination for children	6.2%	7.5%	5.3%	5.5%	6.5%
Nightlife/fun	5.1%	5.6%	4.6%	5.2%	5.7%
Theme parks	3.2%	2.6%	2.6%	3.5%	3.7%
Shopping	4.1%	2.9%	3.2%	3.9%	3.5%
Culture	2.4%	2.8%	2.6%	3.1%	2.5%
Nautical activities	1.1%	1.4%	1.6%	1.8%	1.7%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	75.5%	71.2%	68.7%	66.9%	66.2%
Recommendation by friends or relatives	33.0%	33.3%	31.6%	33.9%	34.4%
The Canary Islands television channel	0.2%	0.2%	0.3%	0.4%	0.3%
Other television or radio channels	0.8%	0.9%	0.8%	0.7%	0.7%
Information in the press/magazines/books	3.9%	3.8%	3.6%	3.5%	3.2%
Attendance at a tourism fair	0.7%	0.5%	0.8%	0.8%	0.6%
Tour Operator's brochure or catalogue	10.0%	8.8%	7.2%	6.5%	5.8%
Recommendation by Travel Agency	8.1%	8.4%	6.1%	6.1%	6.2%
Information obtained via the Internet	21.9%	22.3%	21.7%	19.3%	20.7%
Senior Tourism programme	1.5%	0.6%	0.4%	0.3%	0.1%
Others	6.1%	6.2%	7.1%	6.9%	6.5%

* Multi-choice question

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



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.