Tourist profile trend (2017)
Tenerife: First Quarter

Canary Islands
LATITUDE OF LIFE

How many are they and how much do they spend?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	1,059,587	1,150,121	1,179,865	1,261,312	1,325,439
Average daily expenditure (€)	132.29	130.72	137.77	139.42	143.46
. in their place of residence	93.07	89.49	96.03	98.67	101.67
. in the Canary Islands	39.22	41.23	41.74	40.75	41.79
Average lenght of stay	10.02	10.52	10.19	9.28	9.38
Turnover per tourist (€)	1,158	1,171	1,200	1,137	1,177
Total turnover (> 16 years old) (€m)	1,227	1,347	1,415	1,434	1,560
Share of total turnover	27.7%	28.9%	28.8%	26.6%	--
Share of total tourist	26.5%	27.4%	27.8%	25.8%	--
Expenditure in the Canary Islands per tourist and trip (€) [*]					
Accommodation [**]:	50.43	51.93	55.85	52.54	59.31
- Accommodation	45.17	47.06	47.93	43.31	49.35
- Additional accommodation expenses	5.26	4.87	7.92	9.24	9.96
Transport:	29.43	29.86	30.98	26.11	24.66
- Public transport	5.52	5.54	5.58	4.71	4.44
- Taxi	7.84	7.69	7.00	6.43	6.35
- Car rental	16.07	16.64	18.40	14.97	13.87
Food and drink:	156.13	179.85	183.40	164.67	164.83
- Food purchases at supermarkets	61.97	73.00	85.56	71.73	72.45
- Restaurants	94.15	106.84	97.83	92.94	92.38
Souvenirs:	61.95	68.78	58.91	50.01	58.39
Leisure:	37.15	35.15	39.37	33.78	26.79
- Organized excursions	13.67	15.12	15.24	13.27	9.89
- Leisure, amusement	5.70	5.78	4.91	4.84	4.31
- Trip to other islands	1.96	1.37	1.26	0.96	1.50
- Sporting activities	5.23	4.63	5.94	4.52	4.38
- Cultural activities	1.52	1.97	1.94	1.73	1.26
- Discos and disco-pubs	9.08	6.28	10.09	8.44	5.45
Others:	38.45	31.16	17.55	16.23	13.25
- Wellness	3.15	3.46	2.94	2.77	2.79
- Medical expenses	2.30	1.97	1.90	1.14	1.04
- Other expenses	33.01	25.73	12.71	12.32	9.41

How far in advance do they book their trip?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.2%	0.7%	0.8%	0.9%	0.9%
Between 2 and 7 days	8.4%	7.4%	7.1%	6.9%	6.8%
Between 8 and 15 days	11.3%	8.6%	8.7%	9.2%	6.9%
Between 16 and 30 days	19.5%	16.5%	15.2%	16.0%	15.9%
Between 31 and 90 days	30.4%	33.0%	34.3%	35.9%	34.5%
More than 90 days	30.2%	33.8%	33.9%	31.2%	35.1%

What do they book at their place of residence?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	11.5%	15.8%	16.1%	13.8%	13.4%
Flight and accommodation (room only)	27.2%	25.4%	27.0%	28.8%	28.2%
Flight and accommodation (B&B)	9.2%	10.6%	9.9%	10.0%	11.3%
Flight and accommodation (half board)	20.9%	21.1%	18.8%	20.0%	19.3%
Flight and accommodation (full board)	6.7%	4.7%	4.5%	4.1%	4.1%
Flight and accommodation (all inclusive)	24.5%	22.3%	23.7%	23.4%	23.6%
% Tourists using low-cost airlines	37.9%	41.2%	42.5%	51.4%	51.0%
Other expenses in their place of residence:					
- Car rental	11.9%	11.4%	13.5%	12.5%	13.9%
- Sporting activities	5.4%	3.6%	4.3%	4.2%	3.7%
- Excursions	5.3%	5.7%	6.5%	6.2%	6.0%
- Trip to other islands	2.4%	2.0%	1.7%	1.6%	1.8%

How do they book?

Accommodation booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	46.9%	46.0%	44.1%	45.3%	42.4%
- Tour Operator´s website	75.1%	75.8%	77.9%	80.0%	80.7%
Accommodation	15.2%	15.1%	14.9%	13.8%	15.6%
- Accommodation´s website	74.6%	75.6%	81.3%	82.4%	81.3%
Travel agency (High street)	17.0%	15.7%	15.4%	14.5%	15.6%
Online Travel Agency (OTA)	13.3%	12.1%	14.4%	16.5%	17.3%
No need to book accommodation	7.6%	11.1%	11.2%	9.9%	9.1%

Flight booking	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tour Operator	49.3%	49.6%	46.9%	46.1%	46.2%
- Tour Operator´s website	75.9%	76.8%	78.5%	80.2%	77.8%
Airline	24.0%	26.9%	27.8%	28.3%	27.9%
- Airline´s website	93.8%	96.7%	96.8%	96.3%	97.8%
Travel agency (High street)	16.8%	14.9%	14.4%	13.8%	14.2%
Online Travel Agency (OTA)	9.9%	8.6%	10.9%	11.8%	11.7%

Where do they stay?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	8.9%	9.0%	8.4%	8.6%	8.0%
4* Hotel	39.1%	37.1%	35.9%	38.5%	37.8%
1-2-3* Hotel	13.9%	13.3%	12.0%	12.5%	12.0%
Apartment	27.6%	27.8%	28.5%	29.8%	30.1%
Property (privately-owned,friends,family)	6.2%	10.0%	10.7%	7.8%	7.9%
Others	4.3%	2.9%	4.6%	2.8%	4.3%

Who are they?

Gender	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Percentage of men	47.7%	49.1%	50.3%	47.5%	47.4%
Percentage of women	52.3%	50.9%	49.7%	52.5%	52.6%
Age					
Average age (tourists > 16 years old)	47.7	47.7	47.2	45.5	47.7
Standard deviation	14.9	14.7	14.6	14.9	15.3
Age range (> 16 years old)					
16-24 years old	5.8%	6.2%	6.7%	8.1%	6.7%
25-30 years old	10.3%	10.3%	9.9%	11.8%	10.9%
31-45 years old	28.2%	27.1%	28.1%	30.6%	26.8%
46-60 years old	31.7%	34.4%	35.0%	30.9%	32.4%
Over 60 years old	24.0%	22.0%	20.4%	18.6%	23.2%
Occupation					
Business owner or self-employed	24.4%	26.9%	25.8%	28.3%	26.9%
Upper/Middle management employee	30.8%	32.5%	35.1%	33.4%	30.9%
Auxiliary level employee	15.5%	14.5%	16.3%	15.2%	14.6%
Students	5.2%	4.1%	4.3%	5.3%	4.8%
Retired	21.9%	19.9%	16.6%	15.4%	20.4%
Unemployed / unpaid dom. work	2.1%	2.1%	1.9%	2.5%	2.3%
Annual household income level					
€12,000 - €24,000	18.6%	18.2%	17.7%	16.6%	19.7%
€24,001 - €36,000	21.4%	18.7%	18.9%	18.5%	18.3%
€36,001 - €48,000	14.6%	17.1%	17.2%	17.7%	15.8%
€48,001 - €60,000	14.7%	14.8%	15.9%	13.7%	14.2%
€60,001 - €72,000	7.1%	9.2%	8.6%	9.3%	9.4%
€72,001 - €84,000	5.3%	5.3%	5.8%	6.5%	6.4%
More than €84,000	18.3%	16.7%	16.0%	17.6%	16.1%

(*) 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.

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Canary Islands — LATITUDE OF LIFE

Which island do they choose?

Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	429,077	466,498	483,781	560,886	587,352
- Fuerteventura	366,481	363,967	394,726	473,171	465,858
- Gran Canaria	819,171	895,237	871,881	991,937	1,048,751
- Tenerife	1,059,587	1,150,121	1,179,865	1,261,312	1,325,439
- La Palma	48,806	36,356	42,548	61,898	78,022

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	15.8%	16.0%	16.3%	16.7%	16.8%
- Fuerteventura	13.5%	12.5%	13.3%	14.1%	13.3%
- Gran Canaria	30.1%	30.7%	29.3%	29.6%	29.9%
- Tenerife	38.9%	39.5%	39.7%	37.7%	37.8%
- La Palma	1.8%	1.2%	1.4%	1.8%	2.2%

Who do they come with?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	8.6%	10.3%	9.7%	10.9%	10.9%
Only with partner	51.7%	52.7%	51.1%	47.0%	45.8%
Only with children (under the age of 13)	1.2%	1.2%	0.8%	1.4%	1.6%
Partner + children (under the age of 13)	10.2%	8.1%	9.0%	10.6%	9.8%
Other relatives	6.1%	5.5%	5.6%	5.9%	6.0%
Friends	6.6%	6.7%	6.5%	7.5%	7.2%
Work colleagues	0.3%	0.3%	0.3%	0.4%	0.4%
Other combinations [1]	15.3%	15.3%	16.9%	16.4%	18.3%

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

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	93.2%	91.4%	90.2%	91.1%	89.8%
Tranquillity/rest/relaxation	35.9%	34.4%	34.8%	31.5%	29.5%
Scenery	24.9%	25.6%	28.1%	26.7%	26.5%
Beaches	22.0%	21.4%	21.1%	23.3%	21.9%
Visiting new places	12.6%	13.0%	12.9%	12.3%	11.4%
Price	13.8%	13.3%	12.0%	12.0%	11.3%
Ease of travel	12.5%	10.4%	8.8%	8.7%	9.8%
Security	5.1%	5.7%	6.0%	8.7%	9.2%
Active tourism	5.4%	6.5%	7.0%	7.0%	7.1%
Quality of the environment	7.1%	6.7%	7.1%	6.8%	6.5%
Suitable destination for children	7.5%	5.3%	5.5%	6.5%	6.5%
Nightlife/fun	5.6%	4.6%	5.2%	5.7%	4.9%
Theme parks	2.6%	2.6%	3.5%	3.7%	3.7%
Shopping	2.9%	3.2%	3.9%	3.5%	3.4%
Culture	2.8%	2.6%	3.1%	2.5%	2.9%
Golf	2.3%	1.8%	2.1%	1.4%	1.8%

* Multi-choise question

How do they rate the destination?

Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	93.0%	93.6%	90.8%	94.7%	93.0%
Average rating (scale 1-10)	8.79	8.80	8.64	8.93	8.86

How many are loyal to the destination?

Repeat tourists of the island	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	61.0%	60.6%	60.7%	58.1%	61.0%
In love (at least 10 previous visits)	9,3%	8,5%	8,7%	7,4%	8,0%

What did motivate them to come?

Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	71.2%	68.7%	66.9%	66.2%	67.6%
Recommendation by friends or relatives	33.3%	31.6%	33.9%	34.4%	33.7%
The Canary Islands television channel	0.2%	0.3%	0.4%	0.3%	0.5%
Other television or radio channels	0.9%	0.8%	0.7%	0.7%	0.7%
Information in the press/magazines/books	3.8%	3.6%	3.5%	3.2%	3.7%
Attendance at a tourism fair	0.5%	0.8%	0.8%	0.6%	0.4%
Tour Operator's brochure or catalogue	8.8%	7.2%	6.5%	5.8%	5.2%
Recommendation by Travel Agency	8.4%	6.1%	6.1%	6.2%	6.1%
Information obtained via the Internet	22.3%	21.7%	19.3%	20.7%	19.9%
Senior Tourism programme	0.6%	0.4%	0.3%	0.1%	0.2%
Others	6.2%	7.1%	6.9%	6.5%	6.1%

* Multi-choise question

Where are they from?

Ten main source markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
United Kingdom	338,409	368,720	400,682	450,517	476,853
Germany	174,974	172,854	181,653	187,761	182,236
Spanish Mainland	114,095	101,097	107,442	121,870	136,777
Sweden	73,078	74,752	63,811	81,824	59,728
Italy	23,573	31,261	47,454	48,831	55,729
Belgium	35,115	44,446	46,418	47,621	53,087
Denmark	52,797	45,322	40,272	40,358	49,590
Finland	62,670	59,174	43,213	40,614	46,417
Netherlands	33,651	38,284	32,093	41,116	42,612
France	30,355	39,651	41,371	40,040	42,523

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.