

# Tourist profile trend (2016)

## Tenerife: Second Quarter

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tourist arrivals (> 16 years old)	855,260	880,137	952,834	938,517	1,159,088
Average daily expenditure (€)	125.24	122.42	131.92	137.24	129.81
. in their place of residence	83.91	83.92	91.13	94.63	88.91
. in the Canary Islands	41.33	38.50	40.78	42.61	40.90
Average length of stay	9.22	9.75	8.80	8.53	8.66
Turnover per tourist (€)	1,010	1,035	1,048	1,053	994
Total turnover (> 16 years old) (€m)	864	911	998	988	1,152
Share of total turnover	20.0%	20.6%	21.4%	20.1%	21.4%
Share of total tourist	21.9%	22.0%	22.7%	22.1%	23.7%

Expenditure in the Canary Islands per tourist and trip (€) (*)					
<b>Accommodation (**):</b>	44.68	55.86	46.34	47.68	49.00
- Accommodation	38.31	50.57	41.33	40.58	41.03
- Additional accommodation expenses	6.37	5.30	5.01	7.10	7.97
<b>Transport:</b>	27.92	27.53	25.15	26.06	21.58
- Public transport	3.97	7.64	4.14	4.81	3.44
- Taxi	7.97	6.81	7.25	6.89	5.57
- Car rental	15.97	13.07	13.76	14.36	12.57
<b>Food and drink:</b>	130.07	152.51	135.99	155.39	144.80
- Food purchases at supermarkets	54.41	71.81	55.46	69.93	64.78
- Restaurants	75.66	80.70	80.53	85.46	80.02
<b>Souvenirs:</b>	63.42	54.85	68.43	57.76	54.69
<b>Leisure:</b>	46.63	43.46	39.88	47.26	35.26
- Organized excursions	20.66	22.00	17.05	17.26	16.47
- Leisure, amusement	8.33	7.16	6.63	8.32	6.65
- Trip to other islands	1.77	3.50	1.50	5.88	1.85
- Sporting activities	3.07	2.94	5.02	6.46	3.36
- Cultural activities	2.47	1.85	2.14	1.64	1.48
- Discos and disco-pubs	10.34	6.01	7.55	7.70	5.44
<b>Others:</b>	30.38	19.40	13.54	22.73	12.13
- Wellness	2.69	4.05	3.26	2.81	2.50
- Medical expenses	1.72	1.80	1.23	7.59	1.64
- Other expenses	25.97	13.55	9.04	12.32	7.98

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
The same day they leave	0.5%	0.6%	0.6%	0.9%	0.7%
Between 2 and 7 days	9.2%	8.7%	8.4%	7.8%	6.5%
Between 8 and 15 days	10.4%	9.8%	8.6%	8.2%	7.5%
Between 16 and 30 days	15.7%	17.9%	16.1%	13.9%	15.7%
Between 31 and 90 days	35.6%	33.3%	34.0%	34.8%	35.7%
More than 90 days	28.6%	29.8%	32.3%	34.4%	33.8%

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight only	13.2%	15.1%	11.5%	12.3%	12.0%
Flight and accommodation (room only)	21.3%	22.5%	21.8%	24.0%	26.8%
Flight and accommodation (B&B)	7.4%	7.8%	8.1%	9.0%	8.8%
Flight and accommodation (half board)	24.7%	23.5%	22.9%	21.5%	21.2%
Flight and accommodation (full board)	5.5%	5.5%	6.1%	5.0%	3.8%
Flight and accommodation (all inclusive)	27.9%	25.5%	29.6%	28.2%	27.3%
<b>% Tourists using low-cost airlines</b>	39.8%	45.7%	43.7%	50.5%	58.2%
<b>Other expenses in their place of residence:</b>					
- Car rental	10.7%	11.3%	11.0%	13.4%	14.8%
- Sporting activities	3.8%	4.2%	4.0%	4.3%	3.9%
- Excursions	4.6%	5.6%	6.2%	7.1%	7.2%
- Trip to other islands	0.9%	1.2%	1.6%	1.7%	1.0%

### How do they book?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Accommodation booking</b>					
<b>Tour Operator</b>	44.4%	37.4%	41.8%	39.0%	37.9%
- Tour Operator's website	69.1%	72.7%	73.1%	81.3%	78.4%
<b>Accommodation</b>	12.7%	17.1%	14.9%	16.3%	17.2%
- Accommodation's website	76.8%	77.2%	81.9%	80.7%	83.3%
<b>Travel agency (High street)</b>	19.2%	20.1%	21.4%	20.0%	20.1%
<b>Online Travel Agency (OTA)</b>	14.0%	14.8%	14.2%	16.0%	17.3%
<b>No need to book accommodation</b>	9.8%	10.6%	7.7%	8.6%	7.5%

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Flight booking</b>					
<b>Tour Operator</b>	52.5%	40.1%	43.1%	41.9%	40.2%
- Tour Operator's website	69.5%	71.5%	72.2%	78.7%	76.8%
<b>Airline</b>	20.5%	29.1%	26.3%	30.0%	29.6%
- Airline's website	96.2%	95.9%	96.8%	95.6%	96.8%
<b>Travel agency (High street)</b>	17.4%	19.6%	19.9%	17.9%	18.4%
<b>Online Travel Agency (OTA)</b>	9.6%	11.2%	10.6%	10.1%	11.8%

### Where do they stay?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
5* Hotel	9.8%	11.0%	9.8%	10.0%	9.8%
4* Hotel	45.8%	40.8%	43.2%	40.8%	39.4%
1-2-3* Hotel	10.2%	11.3%	12.0%	12.7%	12.2%
Apartment	23.1%	24.5%	24.1%	26.1%	29.9%
Property (privately-owned, friends, family)	7.0%	9.8%	7.8%	7.6%	5.9%
Others	4.1%	2.6%	3.0%	2.9%	2.9%

### Who are they?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Gender</b>					
Percentage of men	46.2%	42.9%	45.3%	47.7%	47.4%
Percentage of women	53.8%	57.1%	54.7%	52.3%	52.6%

Age					
Average age (tourists > 16 years old)	44.2	43.9	43.9	41.6	43.4
Standard deviation	14.9	14.7	14.2	13.9	14.8

Age range (> 16 years old)					
16-24 years old	10.5%	9.3%	8.5%	12.6%	9.3%
25-30 years old	13.3%	13.7%	14.3%	15.2%	15.7%
31-45 years old	29.2%	32.1%	31.4%	31.7%	31.0%
46-60 years old	30.6%	29.0%	32.3%	30.3%	29.4%
Over 60 years old	16.4%	15.9%	13.5%	10.2%	14.6%

Occupation					
Business owner or self-employed	23.0%	23.8%	25.1%	27.3%	26.0%
Upper/Middle management employee	35.3%	35.0%	36.5%	36.2%	33.9%
Auxiliary level employee	17.6%	18.5%	18.4%	17.3%	18.6%
Students	5.4%	5.5%	4.2%	7.3%	5.1%
Retired	16.1%	14.5%	12.7%	8.7%	13.2%
Unemployed / unpaid dom. work	2.7%	2.7%	3.2%	3.2%	3.1%

Annual household income level					
€12,000 - €24,000	21.4%	24.6%	21.1%	21.0%	22.6%
€24,001 - €36,000	21.8%	21.0%	21.5%	20.2%	20.8%
€36,001 - €48,000	17.2%	16.5%	16.1%	16.4%	15.5%
€48,001 - €60,000	13.3%	14.2%	13.1%	13.1%	12.9%
€60,001 - €72,000	8.0%	7.9%	8.8%	7.4%	9.1%
€72,001 - €84,000	5.4%	4.9%	5.1%	6.1%	6.0%
More than €84,000	12.9%	10.8%	14.5%	15.9%	13.1%

(\*) 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.

# Tourist profile trend (2016)

## Tenerife: Second Quarter



### Which island do they choose?



Tourists (> 16 years old)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	401,337	417,411	469,065	478,832	562,021
- Fuerteventura	310,869	328,775	391,383	388,881	461,607
- Gran Canaria	538,226	530,449	586,170	605,205	750,985
- Tenerife	855,260	880,137	952,834	938,517	1,159,088
- La Palma	27,363	25,365	29,530	36,959	46,894

Share (%)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	18.8%	19.1%	19.3%	19.6%	18.9%
- Fuerteventura	14.6%	15.1%	16.1%	15.9%	15.5%
- Gran Canaria	25.2%	24.3%	24.1%	24.7%	25.2%
- Tenerife	40.1%	40.3%	39.2%	38.3%	38.9%
- La Palma	1.3%	1.2%	1.2%	1.5%	1.6%

### Who do they come with?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Unaccompanied	8.9%	10.7%	9.6%	8.8%	9.8%
Only with partner	51.2%	47.8%	47.8%	46.4%	48.6%
Only with children (under the age of 13)	1.2%	1.8%	1.4%	1.4%	1.2%
Partner + children (under the age of 13)	9.9%	11.2%	11.7%	11.6%	10.1%
Other relatives	5.6%	6.4%	6.6%	6.6%	5.4%
Friends	6.8%	6.8%	7.2%	7.0%	7.9%
Work colleagues	0.7%	0.3%	0.4%	0.5%	0.4%
Other combinations <sup>(1)</sup>	15.7%	15.0%	15.4%	17.8%	16.5%

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

### How do they rate the destination?



Impression of their stay	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Good or very good (% tourists)	93.7%	92.4%	93.6%	94.5%	94.8%
Average rating (scale 1-10)	8.81	8.73	8.87	8.94	8.94

### How many are loyal to the destination?

Repeat tourists of the island	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Repeat tourists	57.5%	54.4%	55.3%	53.8%	52.9%
In love (at least 10 previous visits)	7.8%	7.6%	6.9%	6.6%	5.8%

### Where are they from?



Ten main source markets	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
United Kingdom	342,167	366,235	398,194	389,863	482,868
Spanish Mainland	148,055	132,487	126,498	127,758	163,277
Germany	113,985	110,361	116,340	116,607	157,671
Belgium	30,076	31,029	35,684	40,634	47,188
France	33,377	30,903	43,519	40,415	44,483
Italy	19,151	18,376	26,462	38,266	44,218
Netherlands	24,568	25,417	27,738	28,941	39,926
Ireland	19,672	26,155	28,518	30,073	26,944
Russia	22,267	30,064	36,420	28,085	25,724
Switzerland	13,134	13,908	17,667	20,701	17,242

### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Climate/sun	89.5%	89.6%	89.2%	87.6%	87.2%
Tranquillity/rest/relaxation	35.9%	34.6%	34.1%	31.6%	30.7%
Scenery	25.4%	24.2%	25.9%	26.0%	26.4%
Beaches	21.9%	23.2%	23.2%	21.4%	24.6%
Visiting new places	15.9%	15.0%	16.6%	16.0%	14.8%
Price	16.8%	15.2%	15.1%	14.9%	13.6%
Security	4.8%	4.5%	4.7%	4.8%	9.3%
Ease of travel	10.2%	10.6%	8.6%	9.2%	9.1%
Theme parks	6.0%	6.4%	5.7%	8.0%	7.6%
Quality of the environment	7.3%	6.7%	6.8%	8.1%	7.3%
Suitable destination for children	7.8%	8.0%	8.3%	8.6%	6.1%
Active tourism	3.9%	5.2%	5.3%	6.3%	6.1%
Nightlife/fun	6.3%	5.2%	5.0%	5.7%	4.5%
Culture	2.7%	2.7%	2.0%	3.1%	3.1%
Shopping	4.2%	4.0%	3.6%	3.7%	2.7%
Nautical activities	1.2%	1.6%	1.6%	1.5%	1.7%

\* Multi-choice question

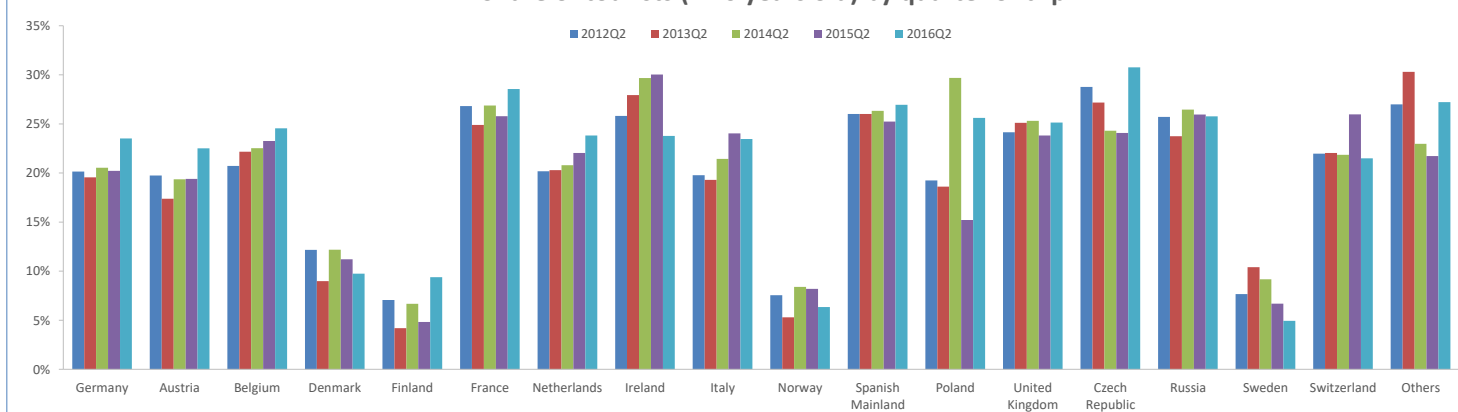
### What did motivate them to come?



Aspects motivating the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Previous visits to the Canary Islands	64.0%	61.4%	59.6%	60.3%	59.7%
Recommendation by friends or relatives	38.8%	38.7%	37.3%	37.0%	37.8%
The Canary Islands television channel	0.5%	0.3%	0.4%	0.6%	0.4%
Other television or radio channels	1.3%	0.7%	1.2%	0.6%	1.0%
Information in the press/magazines/books	4.6%	4.0%	3.3%	3.6%	3.7%
Attendance at a tourism fair	0.6%	0.9%	0.4%	0.4%	0.7%
Tour Operator's brochure or catalogue	10.5%	8.9%	8.1%	6.3%	5.5%
Recommendation by Travel Agency	10.1%	8.1%	9.4%	8.4%	7.9%
Information obtained via the Internet	23.9%	25.6%	24.0%	23.6%	22.2%
Senior Tourism programme	1.7%	0.8%	0.4%	0.4%	0.5%
Others	7.1%	7.5%	6.1%	6.1%	6.0%

\* 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.