

# Tourist profile trend (2016)

## Tenerife: Third Quarter

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	931.210	933.438	997.622	987.323	1.184.832
Average daily expenditure (€)	120,01	124,03	127,48	137,69	132,72
. in their place of residence	82,62	86,36	87,39	96,66	93,70
. in the Canary Islands	37,39	37,67	40,09	41,03	39,02
Average length of stay	10,33	9,97	9,77	9,95	9,73
Turnover per tourist (€)	1.109	1.117	1.124	1.227	1.160
Total turnover (> 16 years old) (€m)	1.033	1.043	1.122	1.212	1.374
Share of total turnover	23,9%	23,6%	24,0%	24,7%	25,5%
Share of total tourist	23,9%	23,4%	23,8%	23,2%	24,3%

Expenditure in the Canary Islands per tourist and trip (€) (*)					
<b>Accommodation (**):</b>	47,22	44,26	39,68	52,01	57,89
- Accommodation	41,40	38,92	34,72	41,27	49,80
- Additional accommodation expenses	5,82	5,34	4,96	10,74	8,09
<b>Transport:</b>	31,12	24,88	24,73	25,86	24,62
- Public transport	6,42	3,58	4,15	5,09	4,71
- Taxi	7,95	6,57	7,04	7,09	6,41
- Car rental	16,74	14,73	13,54	13,68	13,51
<b>Food and drink:</b>	138,53	131,39	150,52	162,38	149,64
- Food purchases at supermarkets	61,97	54,05	66,41	75,14	62,49
- Restaurants	76,57	77,34	84,11	87,23	87,16
<b>Souvenirs:</b>	58,62	79,00	74,43	71,20	61,82
<b>Leisure:</b>	58,50	57,67	58,44	52,09	48,11
- Organized excursions	25,18	28,05	26,76	23,09	22,21
- Leisure, amusement	12,23	11,70	11,53	11,64	10,70
- Trip to other islands	1,90	1,98	1,48	1,40	1,82
- Sporting activities	3,85	4,36	5,38	4,03	4,11
- Cultural activities	2,55	2,07	2,28	1,55	1,74
- Discos and disco-pubs	12,79	9,51	11,01	10,38	7,53
<b>Others:</b>	29,27	16,64	14,58	13,96	14,84
- Wellness	4,16	3,87	2,29	2,48	3,15
- Medical expenses	0,94	0,85	0,87	1,47	3,06
- Other expenses	24,17	11,92	11,42	10,00	8,63

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0,5%	0,6%	0,7%	0,6%	0,6%
Between 2 and 7 days	8,4%	7,6%	8,3%	6,7%	5,4%
Between 8 and 15 days	10,8%	10,8%	9,9%	8,7%	7,9%
Between 16 and 30 days	16,3%	15,4%	13,8%	13,7%	13,5%
Between 31 and 90 days	28,9%	26,7%	27,9%	27,5%	28,0%
More than 90 days	35,0%	38,8%	39,5%	42,9%	44,5%

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	13,7%	12,0%	13,4%	13,2%	10,8%
Flight and accommodation (room only)	20,7%	23,0%	22,5%	24,2%	26,4%
Flight and accommodation (B&B)	6,1%	5,7%	6,9%	7,3%	7,8%
Flight and accommodation (half board)	22,9%	20,5%	21,6%	19,8%	22,2%
Flight and accommodation (full board)	5,2%	4,5%	4,5%	4,6%	4,8%
Flight and accommodation (all inclusive)	31,3%	34,3%	31,1%	30,7%	27,9%
<b>% Tourists using low-cost airlines</b>	42,7%	44,3%	47,3%	51,5%	52,1%
<b>Other expenses in their place of residence:</b>					
- Car rental	9,9%	11,2%	10,6%	12,7%	13,3%
- Sporting activities	4,4%	4,5%	4,4%	5,2%	4,5%
- Excursions	6,6%	7,8%	7,9%	8,3%	7,9%
- Trip to other islands	0,8%	1,0%	0,9%	0,9%	1,1%

### How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	37,6%	39,8%	40,6%	38,5%	35,9%
- Tour Operator's website	71,5%	74,4%	74,7%	77,6%	81,3%
<b>Accommodation</b>	12,8%	12,9%	13,3%	14,0%	16,6%
- Accommodation's website	80,7%	81,0%	79,3%	81,4%	83,1%
<b>Travel agency (High street)</b>	26,1%	24,9%	21,7%	22,5%	21,3%
<b>Online Travel Agency (OTA)</b>	12,3%	13,1%	14,4%	15,3%	18,3%
<b>No need to book accommodation</b>	11,2%	9,3%	10,0%	9,6%	7,8%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	41,4%	41,2%	44,8%	41,4%	37,5%
- Tour Operator's website	70,5%	71,8%	72,7%	75,3%	77,3%
<b>Airline</b>	24,2%	24,5%	24,4%	25,4%	29,7%
- Airline's website	94,1%	95,2%	94,5%	95,8%	96,3%
<b>Travel agency (High street)</b>	24,2%	22,8%	19,3%	21,0%	19,6%
<b>Online Travel Agency (OTA)</b>	10,3%	11,5%	11,5%	12,2%	13,2%

### Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	9,7%	8,5%	9,1%	9,5%	9,2%
4* Hotel	41,7%	42,5%	41,4%	42,2%	42,1%
1-2-3* Hotel	11,9%	12,0%	13,1%	11,4%	11,1%
Apartment	26,1%	27,0%	25,1%	26,9%	29,0%
Property (privately-owned, friends, family)	10,0%	8,7%	10,0%	9,1%	6,5%
Others	0,7%	1,2%	1,3%	1,0%	2,0%

### Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Gender</b>					
Percentage of men	44,7%	45,2%	45,9%	48,7%	48,1%
Percentage of women	55,3%	54,8%	54,1%	51,3%	51,9%
<b>Age</b>					
Average age (tourists > 16 years old)	38,4	38,1	37,0	37,3	38,9
Standard deviation	12,8	12,1	12,3	11,9	12,9
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	17,3%	15,8%	19,4%	16,8%	16,6%
25-30 years old	15,9%	16,5%	18,2%	18,0%	15,2%
31-45 years old	37,0%	38,7%	35,8%	39,0%	36,5%
46-60 years old	25,0%	25,8%	23,8%	23,8%	26,2%
Over 60 years old	4,8%	3,2%	2,8%	2,4%	5,6%
<b>Occupation</b>					
Business owner or self-employed	25,0%	24,4%	26,2%	26,5%	28,3%
Upper/Middle management employee	35,7%	37,5%	37,2%	35,9%	36,5%
Auxiliary level employee	21,3%	22,3%	21,7%	22,9%	19,5%
Students	9,5%	9,0%	9,5%	9,6%	9,0%
Retired	4,7%	3,1%	2,5%	2,0%	4,0%
Unemployed / unpaid dom. work	3,7%	3,7%	2,9%	3,2%	2,7%
<b>Annual household income level</b>					
€12,000 - €24,000	26,2%	23,4%	24,1%	24,3%	22,3%
€24,001 - €36,000	21,0%	23,2%	21,8%	20,9%	20,6%
€36,001 - €48,000	17,7%	16,6%	15,8%	16,3%	16,1%
€48,001 - €60,000	12,6%	13,1%	12,7%	13,0%	14,4%
€60,001 - €72,000	6,9%	7,2%	7,8%	8,0%	8,6%
€72,001 - €84,000	4,8%	4,4%	5,2%	4,7%	5,3%
More than €84,000	10,8%	12,1%	12,5%	12,8%	12,8%

(\*) 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: Third Quarter



### Which island do they choose?



Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	465.423	491.243	508.699	544.296	604.857
- Fuerteventura	385.948	411.931	440.855	447.593	484.107
- Gran Canaria	592.788	625.351	656.504	675.982	847.744
- Tenerife	931.210	933.438	997.622	987.323	1.184.832
- La Palma	39.502	33.517	35.685	38.837	46.789

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	19,3%	19,7%	19,3%	20,2%	19,1%
- Fuerteventura	16,0%	16,5%	16,7%	16,6%	15,3%
- Gran Canaria	24,5%	25,1%	24,9%	25,1%	26,8%
- Tenerife	38,6%	37,4%	37,8%	36,6%	37,4%
- La Palma	1,6%	1,3%	1,4%	1,4%	1,5%

### Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	6,4%	7,4%	6,9%	7,2%	5,8%
Only with partner	40,9%	38,6%	41,6%	39,5%	37,7%
Only with children (under the age of 13)	2,1%	2,4%	2,1%	2,7%	2,7%
Partner + children (under the age of 13)	17,0%	15,7%	15,8%	17,2%	18,8%
Other relatives	7,2%	7,3%	5,9%	7,1%	6,5%
Friends	6,3%	6,7%	7,1%	4,6%	5,9%
Work colleagues	0,3%	0,4%	0,3%	0,2%	0,1%
Other combinations <sup>(1)</sup>	19,8%	21,4%	20,4%	21,5%	22,5%

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

### How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	93,0%	93,5%	92,9%	93,8%	94,4%
Average rating (scale 1-10)	8,84	8,80	8,84	8,88	8,93

### How many are loyal to the destination?

Repeat tourists of the island	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	47,2%	46,1%	45,6%	47,2%	48,2%
In love (at least 10 previous visits)	5,2%	4,9%	4,9%	5,0%	4,4%

### Where are they from?



Ten main source markets	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
United Kingdom	354.698	370.134	416.933	401.703	493.770
Spanish Mainland	189.249	152.830	142.818	160.914	184.150
Germany	115.622	113.067	122.590	114.197	145.296
Italy	28.807	28.926	32.453	40.832	50.922
Netherlands	31.610	31.789	34.163	35.692	47.603
Belgium	34.451	32.889	35.991	41.752	46.431
France	31.692	34.522	42.792	39.341	38.179
Ireland	21.754	25.663	27.236	24.776	32.767
Russia	24.981	44.360	39.073	29.985	26.183
Switzerland	15.672	18.091	18.899	16.062	19.321

### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	87,3%	85,7%	86,0%	84,7%	85,9%
Beaches	27,7%	29,5%	28,7%	29,7%	30,9%
Tranquillity/rest/relaxation	34,8%	30,4%	28,9%	29,4%	28,6%
Scenery	22,8%	23,1%	25,3%	26,8%	24,8%
Visiting new places	19,1%	19,3%	18,7%	18,4%	19,5%
Price	18,1%	15,2%	17,8%	14,8%	13,8%
Theme parks	10,8%	11,2%	12,6%	12,2%	12,0%
Suitable destination for children	10,7%	9,7%	10,3%	9,7%	11,3%
Security	3,3%	4,1%	3,5%	6,2%	9,3%
Ease of travel	7,6%	6,4%	6,1%	5,7%	6,3%
Quality of the environment	6,5%	6,6%	6,3%	7,5%	6,0%
Active tourism	3,7%	4,0%	4,8%	4,6%	5,2%
Nightlife/fun	7,5%	6,6%	7,4%	6,8%	5,1%
Culture	3,0%	2,9%	2,8%	3,3%	3,0%
Shopping	4,1%	3,1%	3,7%	4,2%	2,9%
Nautical activities	2,0%	2,0%	2,7%	2,5%	2,4%

\* Multi-choice question

### What did motivate them to come?



Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	57,3%	52,0%	53,4%	53,8%	53,7%
Recommendation by friends or relatives	44,7%	38,2%	40,8%	42,3%	41,1%
The Canary Islands television channel	1,1%	0,6%	0,7%	0,5%	0,4%
Other television or radio channels	1,7%	1,4%	1,0%	1,2%	0,8%
Information in the press/magazines/books	5,3%	4,3%	3,8%	4,0%	3,9%
Attendance at a tourism fair	0,7%	0,6%	0,5%	0,6%	0,6%
Tour Operator's brochure or catalogue	10,7%	10,4%	10,0%	8,1%	6,5%
Recommendation by Travel Agency	12,5%	11,5%	10,5%	10,5%	9,2%
Information obtained via the Internet	25,6%	25,3%	26,3%	26,3%	27,4%
Senior Tourism programme	0,3%	0,1%	0,1%	0,2%	0,1%
Others	6,0%	6,4%	5,9%	5,0%	5,7%

\* 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.