

## Tourist profile trend (2017)

### Tenerife: Third Quarter



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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	933,438	997,622	987,323	1,184,832	1,237,883
Average daily expenditure (€)	124.03	127.48	137.69	132.72	132.61
. in their place of residence	86.36	87.39	96.66	93.70	93.13
. in the Canary Islands	37.67	40.09	41.03	39.02	39.48
Average length of stay	9.97	9.77	9.95	9.73	9.69
Turnover per tourist (€)	1,117	1,124	1,227	1,160	1,141
Total turnover (> 16 years old) (€m)	1,043	1,122	1,212	1,374	1,412
Share of total turnover	23.6%	24.0%	24.7%	25.5%	--
Share of total tourist	23.4%	23.8%	23.2%	24.3%	--

#### Expenditure in the Canary Islands per tourist and trip (€) (\*)

<b>Accommodation (**):</b>	44.26	39.68	52.01	57.89	48.41
- Accommodation	38.92	34.72	41.27	49.80	38.50
- Additional accommodation expenses	5.34	4.96	10.74	8.09	9.91
<b>Transport:</b>	24.88	24.73	25.86	24.62	26.51
- Public transport	3.58	4.15	5.09	4.71	5.47
- Taxi	6.57	7.04	7.09	6.41	5.79
- Car rental	14.73	13.54	13.68	13.51	15.24
<b>Food and drink:</b>	131.39	150.52	162.38	149.64	159.78
- Food purchases at supermarkets	54.05	66.41	75.14	62.49	72.03
- Restaurants	77.34	84.11	87.23	87.16	87.75
<b>Souvenirs:</b>	79.00	74.43	71.20	61.82	57.54
<b>Leisure:</b>	57.67	58.44	52.09	48.11	48.18
- Organized excursions	28.05	26.76	23.09	22.21	23.95
- Leisure, amusement	11.70	11.53	11.64	10.70	11.38
- Trip to other islands	1.98	1.48	1.40	1.82	1.70
- Sporting activities	4.36	5.38	4.03	4.11	3.97
- Cultural activities	2.07	2.28	1.55	1.74	1.17
- Discos and disco-pubs	9.51	11.01	10.38	7.53	6.02
<b>Others:</b>	16.64	14.58	13.96	14.84	14.86
- Wellness	3.87	2.29	2.48	3.15	2.00
- Medical expenses	0.85	0.87	1.47	3.06	1.03
- Other expenses	11.92	11.42	10.00	8.63	11.83

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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.6%	0.7%	0.6%	0.6%	0.5%
Between 2 and 7 days	7.6%	8.3%	6.7%	5.4%	6.2%
Between 8 and 15 days	10.8%	9.9%	8.7%	7.9%	8.1%
Between 16 and 30 days	15.4%	13.8%	13.7%	13.5%	13.0%
Between 31 and 90 days	26.7%	27.9%	27.5%	28.0%	27.9%
More than 90 days	38.8%	39.5%	42.9%	44.5%	44.3%

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



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	12.0%	13.4%	13.2%	10.8%	13.6%
Flight and accommodation (room only)	23.0%	22.5%	24.2%	26.4%	25.6%
Flight and accommodation (B&B)	5.7%	6.9%	7.3%	7.8%	7.9%
Flight and accommodation (half board)	20.5%	21.6%	19.8%	22.2%	20.5%
Flight and accommodation (full board)	4.5%	4.5%	4.6%	4.8%	4.2%
Flight and accommodation (all inclusive)	34.3%	31.1%	30.7%	27.9%	28.2%
<b>% Tourists using low-cost airlines</b>	44.3%	47.3%	51.5%	52.1%	55.0%
<b>Other expenses in their place of residence:</b>					
- Car rental	11.2%	10.6%	12.7%	13.3%	13.3%
- Sporting activities	4.5%	4.4%	5.2%	4.5%	4.4%
- Excursions	7.8%	7.9%	8.3%	7.9%	9.4%
- Trip to other islands	1.0%	0.9%	0.9%	1.1%	1.3%

#### How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	39.8%	40.6%	38.5%	35.9%	36.9%
- Tour Operator's website	74.4%	74.7%	77.6%	81.3%	80.3%
<b>Accommodation</b>	12.9%	13.3%	14.0%	16.6%	15.4%
- Accommodation's website	81.0%	79.3%	81.4%	83.1%	84.5%
<b>Travel agency (High street)</b>	24.9%	21.7%	22.5%	21.3%	20.9%
<b>Online Travel Agency (OTA)</b>	13.1%	14.4%	15.3%	18.3%	16.6%
<b>No need to book accommodation</b>	9.3%	10.0%	9.6%	7.8%	10.1%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	41.2%	44.8%	41.4%	37.5%	39.9%
- Tour Operator's website	71.8%	72.7%	75.3%	77.3%	79.2%
<b>Airline</b>	24.5%	24.4%	25.4%	29.7%	28.2%
- Airline's website	95.2%	94.5%	95.8%	96.3%	97.6%
<b>Travel agency (High street)</b>	22.8%	19.3%	21.0%	19.6%	19.4%
<b>Online Travel Agency (OTA)</b>	11.5%	11.5%	12.2%	13.2%	12.5%

#### Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>5* Hotel</b>	8.5%	9.1%	9.5%	9.2%	9.4%
<b>4* Hotel</b>	42.5%	41.4%	42.2%	42.1%	39.4%
<b>1-2-3* Hotel</b>	12.0%	13.1%	11.4%	11.1%	11.5%
<b>Apartment</b>	27.0%	25.1%	26.9%	29.0%	29.7%
<b>Property (privately-owned, friends, family)</b>	8.7%	10.0%	9.1%	6.5%	8.1%
<b>Others</b>	1.2%	1.3%	1.0%	2.0%	1.9%

#### Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
<b>Gender</b>					
Percentage of men	45.2%	45.9%	48.7%	48.1%	48.5%
Percentage of women	54.8%	54.1%	51.3%	51.9%	51.5%
<b>Age</b>					
Average age (tourists > 16 years old)	38.1	37.0	37.3	38.9	39.4
Standard deviation	12.1	12.3	11.9	12.9	13.5

<b>Age range (&gt; 16 years old)</b>					
16-24 years old	15.8%	19.4%	16.8%	16.6%	17.0%
25-30 years old	16.5%	18.2%	18.0%	15.2%	15.3%
31-45 years old	38.7%	35.8%	39.0%	36.5%	33.4%
46-60 years old	25.8%	23.8%	23.8%	26.2%	27.9%
Over 60 years old	3.2%	2.8%	2.4%	5.6%	6.5%

<b>Occupation</b>					
Business owner or self-employed	24.4%	26.2%	26.5%	28.3%	27.0%
Upper/Middle management employee	37.5%	37.2%	35.9%	36.5%	36.7%
Auxiliary level employee	22.3%	21.7%	22.9%	19.5%	19.4%
Students	9.0%	9.5%	9.6%	9.0%	9.9%
Retired	3.1%	2.5%	2.0%	4.0%	4.9%
Unemployed / unpaid dom. work	3.7%	2.9%	3.2%	2.7%	2.0%

<b>Annual household income level</b>					
€12,000 - €24,000	23.4%	24.1%	24.3%	22.3%	22.4%
€24,001 - €36,000	23.2%	21.8%	20.9%	20.6%	21.5%
€36,001 - €48,000	16.6%	15.8%	16.3%	16.1%	15.0%
€48,001 - €60,000	13.1%	12.7%	13.0%	14.4%	13.3%
€60,001 - €72,000	7.2%	7.8%	8.0%	8.6%	8.3%
€72,001 - €84,000	4.4%	5.2%	4.7%	5.3%	5.4%
More than €84,000	12.1%	12.5%	12.8%	12.8%	14.1%

(\*) 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 (2017)

### Tenerife: Third Quarter



#### Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	491,243	508,699	544,296	604,857	645,448
- Fuerteventura	411,931	440,855	447,593	484,107	493,948
- Gran Canaria	625,351	656,504	675,982	847,744	910,485
- Tenerife	933,438	997,622	987,323	1,184,832	1,237,883
- La Palma	33,517	35,685	38,837	46,789	57,969

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	19.7%	19.3%	20.2%	19.1%	19.3%
- Fuerteventura	16.5%	16.7%	16.6%	15.3%	14.8%
- Gran Canaria	25.1%	24.9%	25.1%	26.8%	27.2%
- Tenerife	37.4%	37.8%	36.6%	37.4%	37.0%
- La Palma	1.3%	1.4%	1.4%	1.5%	1.7%

#### Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	7.4%	6.9%	7.2%	5.8%	7.8%
Only with partner	38.6%	41.6%	39.5%	37.7%	37.2%
Only with children (under the age of 13)	2.4%	2.1%	2.7%	2.7%	3.1%
Partner + children (under the age of 13)	15.7%	15.8%	17.2%	18.8%	17.5%
Other relatives	7.3%	5.9%	7.1%	6.5%	6.4%
Friends	6.7%	7.1%	4.6%	5.9%	5.6%
Work colleagues	0.4%	0.3%	0.2%	0.1%	0.2%
Other combinations <sup>(1)</sup>	21.4%	20.4%	21.5%	22.5%	22.1%

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

#### How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	93.5%	92.9%	93.8%	94.4%	93.8%
Average rating (scale 1-10)	8.80	8.84	8.88	8.93	8.94

#### How many are loyal to the destination?

Repeat tourists of the island	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	46.1%	45.6%	47.2%	48.2%	47.5%
In love (at least 10 previous visits)	4.9%	4.9%	5.0%	4.4%	6.0%

#### Where are they from?



Ten main source markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
United Kingdom	370,134	416,933	401,703	493,770	521,209
Spanish Mainland	152,830	142,818	160,914	184,150	181,392
Germany	113,067	122,590	114,197	145,296	152,315
Italy	28,926	32,453	40,832	50,922	54,097
Belgium	32,889	35,991	41,752	46,431	48,464
Netherlands	31,789	34,163	35,692	47,603	41,847
France	34,522	42,792	39,341	38,179	40,742
Ireland	25,663	27,236	24,776	32,767	33,754
Poland	2,252	15,277	16,929	10,671	26,685
Russia	44,360	39,073	29,985	26,183	22,973

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	85.7%	86.0%	84.7%	85.9%	83.0%
Beaches	29.5%	28.7%	29.7%	30.9%	32.9%
Tranquillity/rest/relaxation	30.4%	28.9%	29.4%	28.6%	27.5%
Scenery	23.1%	25.3%	26.8%	24.8%	26.1%
Visiting new places	19.3%	18.7%	18.4%	19.5%	18.6%
Price	15.2%	17.8%	14.8%	13.8%	12.4%
Theme parks	11.2%	12.6%	12.2%	12.0%	12.3%
Suitable destination for children	9.7%	10.3%	9.7%	11.3%	10.1%
Quality of the environment	6.6%	6.3%	7.5%	6.0%	6.5%
Security	4.1%	3.5%	6.2%	9.3%	7.7%
Ease of travel	6.4%	6.1%	5.7%	6.3%	7.2%
Nightlife, fun	6.6%	7.4%	6.8%	5.1%	5.8%
Active tourism	4.0%	4.8%	4.6%	5.2%	4.8%
Shopping	3.1%	3.7%	4.2%	2.9%	3.1%
Culture	2.9%	2.8%	3.3%	3.0%	3.1%
Nautical activities	2.0%	2.7%	2.5%	2.4%	2.0%

\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	52.0%	53.4%	53.8%	53.7%	52.8%
Recommendation by friends or relatives	38.2%	40.8%	42.3%	41.1%	42.0%
The Canary Islands television channel	0.6%	0.7%	0.5%	0.4%	0.5%
Other television or radio channels	1.4%	1.0%	1.2%	0.8%	0.9%
Information in the press/magazines/books	4.3%	3.8%	4.0%	3.9%	4.0%
Attendance at a tourism fair	0.6%	0.5%	0.6%	0.6%	0.6%
Tour Operator's brochure or catalogue	10.4%	10.0%	8.1%	6.5%	5.3%
Recommendation by Travel Agency	11.5%	10.5%	10.5%	9.2%	9.8%
Information obtained via the Internet	25.3%	26.3%	26.3%	27.4%	25.9%
Senior Tourism programme	0.1%	0.1%	0.2%	0.1%	0.1%
Others	6.4%	5.9%	5.0%	5.7%	5.0%

\* 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.