

TOURIST PROFILE BY SOURCE MARKETS (2018)

TENERIFE: MAIN SOURCE MARKETS



How many are they and how much do they spend?



	UK	Germany	Spain	Nordics	Tenerife
TOURISTS					
Tourist arrivals (FRONTUR) (*)	2,230	756	747	411	5,759
Tourist arrivals > 15 years old (EGT) (*)	1,918	681	656	341	4,991
- book holiday package (*)	1,107	463	251	224	2,680
- do not book holiday package (*)	811	218	406	117	2,312
- % tourists who book holiday package	57.7%	68.0%	38.2%	65.8%	53.7%

(*) Thousands of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE

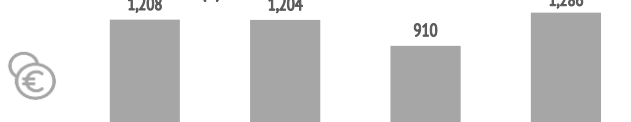


	UK	Germany	Spain	Nordics	Tenerife
Expenditure per tourist (€)	1,208	1,204	910	1,286	1,186
- book holiday package	1,369	1,312	1,092	1,360	1,335
- holiday package	1087	1,075	824	1,083	1,064
- others	282	237	268	277	272
- do not book holiday package	989	975	798	1,144	1,014
- flight	275	275	232	364	289
- accommodation	337	295	258	378	326
- others	377	404	308	403	399
Average length of stay	8.39	10.38	7.32	9.49	9.00
- book holiday package	8.05	9.35	6.75	8.50	8.29
- do not book holiday package	8.86	12.56	7.67	11.39	9.82
Average daily expenditure (€)	157.4	130.9	142.3	153.1	147.4
- book holiday package	179.5	148.1	173.1	169.2	170.1
- do not book holiday package	127.2	94.3	123.3	122.3	121.0
Total turnover (> 15 years old) (€m)	2,318	820	597	438	5,922
- book holiday package	1,516	608	274	305	3,578
- do not book holiday package	802	213	323	134	2,344

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

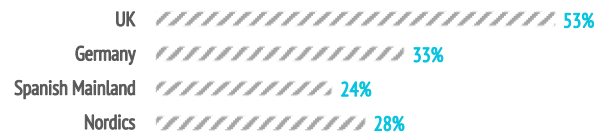


	UK	Germany	Spain	Nordics	Tenerife
Climate	81.1%	74.3%	63.9%	84.3%	76.8%
Safety	59.8%	50.0%	34.5%	39.1%	50.9%
Tranquility	42.0%	43.3%	44.0%	35.1%	42.9%
Accommodation supply	53.4%	33.4%	23.8%	28.2%	40.4%
Price	50.5%	27.8%	25.8%	27.2%	38.4%
Sea	29.3%	51.2%	36.8%	40.0%	38.4%
Landscapes	21.0%	46.6%	49.3%	28.4%	35.2%
European belonging	34.3%	36.8%	34.9%	28.4%	35.1%
Effortless trip	42.3%	39.2%	24.7%	20.9%	34.0%
Environment	32.6%	26.8%	38.1%	29.6%	33.2%
Beaches	27.9%	30.9%	30.0%	29.2%	30.6%
Fun possibilities	30.1%	16.7%	25.0%	13.1%	25.2%
Gastronomy	23.5%	21.9%	23.7%	19.6%	23.6%
Authenticity	17.4%	17.7%	25.1%	9.7%	19.6%
Exoticism	9.1%	8.1%	14.1%	7.3%	11.8%
Shopping	12.4%	9.3%	7.7%	7.7%	11.2%
Hiking trail network	3.3%	15.2%	14.2%	14.1%	10.5%
Nightlife	13.0%	3.6%	7.9%	4.7%	9.2%
Culture	7.5%	8.1%	10.9%	3.8%	8.0%
Historical heritage	5.3%	7.3%	13.9%	4.6%	7.7%

Each aspect is rated individually ("Not important", "Somewhat", "Quite", "Very important")

% of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE ACCOMMODATION SUPPLY



What is the main motivation for their holidays?



	UK	Germany	Spain	Nordics	Tenerife
Rest	63.8%	37.5%	31.7%	60.1%	52.0%
Enjoy family time	15.9%	8.8%	24.3%	24.5%	15.4%
Have fun	12.8%	9.0%	8.6%	3.7%	10.4%
Explore the destination	5.3%	39.0%	32.6%	8.4%	18.9%
Practice their hobbies	0.5%	2.3%	1.0%	1.3%	1.1%
Other reasons	1.7%	3.4%	1.7%	2.0%	2.1%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?



	UK	Germany	Spain	Nordics	Tenerife
The same day	0.7%	0.6%	1.1%	0.8%	0.9%
Between 1 and 30 days	19.1%	23.2%	25.5%	25.1%	23.1%
Between 1 and 2 months	18.2%	21.0%	31.2%	22.7%	21.9%
Between 3 and 6 months	31.7%	34.5%	32.5%	31.4%	32.7%
More than 6 months	30.2%	20.7%	9.8%	20.0%	21.4%

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

TOURIST PROFILE BY SOURCE MARKETS (2018)

TENERIFE: MAIN SOURCE MARKETS



What channels did they use to get information about the trip? 🔍

	UK	Germany	Spain	Nordics	Tenerife
Previous visits to the Canary Islands	57.6%	43.6%	35.3%	57.6%	47.6%
Friends or relatives	31.9%	27.5%	34.2%	24.7%	31.1%
Internet or social media	55.8%	55.1%	49.4%	56.2%	54.5%
Mass Media	1.5%	3.1%	1.3%	1.4%	1.7%
Travel guides and magazines	7.3%	17.5%	4.8%	6.2%	9.2%
Travel Blogs or Forums	4.3%	5.8%	8.1%	3.6%	5.7%
Travel TV Channels	0.4%	1.2%	0.2%	0.3%	0.6%
Tour Operator or Travel Agency	21.5%	31.0%	19.3%	19.7%	22.4%
Public administrations or similar	0.4%	0.4%	1.8%	0.4%	0.6%
Others	2.7%	2.1%	3.3%	2.9%	2.7%

* Multi-choise question

With whom did they book their flight and accommodation? 👁️

	UK	Germany	Spain	Nordics	Tenerife
Flight					
- Directly with the airline	44.5%	29.0%	50.2%	35.1%	43.9%
- Tour Operator or Travel Agency	55.5%	71.0%	49.8%	64.9%	56.1%
Accommodation					
- Directly with the accommodation	32.1%	19.7%	37.8%	30.1%	32.4%
- Tour Operator or Travel Agency	67.9%	80.3%	62.2%	69.9%	67.6%

Where do they stay? 🛏️

	UK	Germany	Spain	Nordics	Tenerife
1-2-3* Hotel	8.5%	12.6%	10.6%	12.9%	10.1%
4* Hotel	38.2%	45.1%	40.3%	31.9%	37.7%
5* Hotel / 5* Luxury Hotel	12.7%	7.1%	9.7%	3.2%	9.5%
Aparthotel / Tourist Villa	25.2%	14.8%	13.2%	34.7%	22.0%
House/room rented in a private dwelling	3.9%	6.3%	6.8%	4.1%	5.9%
Private accommodation (1)	5.3%	8.5%	15.3%	4.5%	8.1%
Others (Cottage, cruise, camping,...)	6.2%	5.6%	4.1%	8.6%	6.6%

(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.

What do they book? 🍽️

	UK	Germany	Spain	Nordics	Tenerife
Room only	29.6%	18.5%	23.8%	37.2%	29.1%
Bed and Breakfast	12.6%	13.8%	16.1%	23.9%	14.3%
Half board	20.8%	39.4%	30.2%	12.6%	24.6%
Full board	2.4%	1.5%	8.6%	2.9%	3.3%
All inclusive	34.5%	26.8%	21.3%	23.4%	28.7%

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28.7% of tourists book all inclusive.



35%
UK



21%
Spanish Mainland



27%
Germany



23%
Nordics

Other expenses 📍

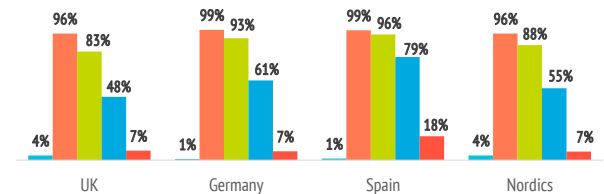
	UK	Germany	Spain	Nordics	Tenerife
Restaurants or cafes	62.1%	58.5%	75.1%	61.5%	62.6%
Supermarkets	53.9%	57.9%	46.1%	54.1%	54.1%
Car rental	9.8%	34.0%	54.0%	15.7%	25.2%
Organized excursions	15.2%	31.5%	31.0%	18.7%	23.0%
Taxi, transfer, chauffeur service	56.3%	49.1%	23.1%	55.2%	46.5%
Theme Parks	12.0%	14.3%	24.7%	5.7%	13.8%
Sport activities	5.7%	5.4%	4.0%	3.0%	5.4%
Museums	0.8%	3.6%	3.9%	1.6%	2.1%
Flights between islands	3.0%	2.9%	6.4%	3.3%	4.4%

Activities in the Canary Islands 🚶

Outdoor time per day	UK	Germany	Spain	Nordics	Tenerife
0 hours	3.5%	0.8%	1.2%	3.6%	2.0%
1 - 2 hours	13.8%	6.4%	3.1%	8.8%	8.7%
3 - 6 hours	34.5%	32.1%	17.2%	32.9%	29.4%
7 - 12 hours	41.0%	54.0%	60.3%	48.2%	50.3%
More than 12 hours	7.2%	6.7%	18.2%	6.6%	9.5%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

■ 0 hours ■ More than 1 hour ■ More than 3 hours ■ More than 7 hours ■ More than 12 hours



Activities in the Canary Islands	UK	Germany	Spain	Nordics	Tenerife
Walk, wander	73.8%	61.5%	79.4%	78.2%	72.7%
Beach	56.4%	70.7%	65.3%	51.5%	62.2%
Swimming pool, hotel facilities	72.2%	37.8%	52.4%	62.3%	59.9%
Explore the island on their own	32.1%	57.1%	65.4%	43.1%	46.3%
Theme parks	22.9%	29.2%	32.9%	15.8%	25.3%
Taste Canarian gastronomy	18.7%	35.4%	43.0%	16.0%	25.1%
Organized excursions	18.1%	24.7%	18.2%	19.6%	20.5%
Nightlife / concerts / shows	25.1%	8.4%	14.2%	11.1%	17.2%
Sea excursions / whale watching	14.2%	17.1%	16.1%	7.1%	15.3%
Sport activities	11.5%	15.6%	10.3%	10.3%	12.6%
Nature activities	4.2%	18.7%	19.5%	11.7%	11.6%
Wineries / markets / popular festiv	6.9%	9.4%	14.5%	9.8%	9.4%
Activities at sea	7.7%	13.2%	9.8%	4.3%	9.2%
Museums / exhibitions	4.1%	8.3%	10.9%	5.5%	6.7%
Beauty and health treatments	6.4%	4.1%	5.3%	5.0%	5.8%
Astronomical observation	3.3%	5.7%	5.2%	5.1%	4.3%

* Multi-choise question



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TENERIFE: MAIN SOURCE MARKETS



Which places do they visit in Tenerife?



	UK	Germany	Spain	Nordics	Tenerife
Parque Nacional del Teide	17.5%	53.3%	58.0%	26.2%	37.3%
Santa Cruz (capital de la isla)	10.3%	36.3%	50.2%	17.3%	26.9%
La Laguna (Ciudad Patrimonio de la	4.6%	25.0%	42.2%	9.4%	17.6%
Acantilado de los Gigantes	4.3%	16.5%	44.5%	8.2%	17.1%
Garachico	3.9%	23.0%	35.2%	5.7%	15.6%
La Orotava	3.1%	23.9%	40.2%	7.1%	15.2%
Icod de los Vinos (Drago Milenario)	3.5%	22.6%	36.8%	5.8%	14.7%
Barranco de Masca	3.2%	18.0%	19.6%	7.1%	11.9%
Parque rural de Anaga	2.0%	19.0%	18.6%	3.6%	9.3%
Teno / Buenavista	1.6%	16.6%	12.8%	2.5%	7.3%
Barranco del Infierno	0.7%	3.8%	7.3%	1.4%	3.2%

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4 in 10 tourists in Tenerife visit Parque Nacional del Teide

Internet usage during their trip



	UK	Germany	Spain	Nordics	Tenerife
Research					
- Tourist package	17.3%	16.6%	14.4%	11.5%	15.9%
- Flights	16.6%	11.0%	9.4%	9.8%	13.2%
- Accommodation	20.9%	20.1%	13.0%	11.7%	17.7%
- Transport	17.3%	17.2%	13.2%	12.8%	16.3%
- Restaurants	28.8%	26.9%	31.6%	24.9%	28.5%
- Excursions	24.6%	33.7%	24.6%	25.1%	26.9%
- Activities	30.1%	36.7%	27.8%	29.5%	31.8%
Book or purchase					
- Tourist package	39.5%	38.5%	22.9%	51.2%	35.6%
- Flights	65.8%	50.9%	68.3%	75.9%	65.6%
- Accommodation	56.3%	37.4%	55.8%	67.7%	54.8%
- Transport	43.9%	33.9%	52.0%	56.3%	45.2%
- Restaurants	12.2%	6.7%	14.3%	16.2%	12.0%
- Excursions	11.3%	16.5%	24.3%	17.3%	15.3%
- Activities	15.6%	15.2%	24.0%	16.5%	16.6%

* Multi-choice question

Internet usage in the Canary Islands	UK	Germany	Spain	Nordics	Tenerife
Did not use the Internet	11.6%	9.7%	7.6%	7.6%	9.8%
Used the Internet	88.4%	90.3%	92.4%	92.4%	90.2%
- Own Internet connection	32.8%	37.0%	61.2%	37.7%	38.8%
- Free Wifi connection	42.9%	39.7%	18.5%	38.1%	37.5%
Applications*					
- Search for locations or maps	54.3%	72.0%	76.6%	63.9%	64.6%
- Search for destination info	44.4%	52.9%	41.8%	53.0%	46.0%
- Share pictures or trip videos	56.0%	52.1%	53.5%	55.2%	55.6%
- Download tourist apps	5.3%	6.1%	6.2%	10.0%	6.4%
- Others	24.7%	18.8%	16.4%	26.9%	20.5%

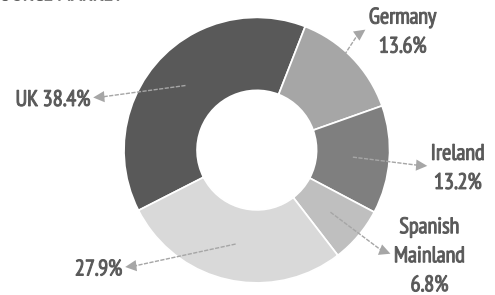
* Multi-choice question

How many islands do they visit during their trip?



	UK	Germany	Spain	Nordics	Tenerife
One island	95.3%	90.9%	87.4%	93.1%	91.1%
Two islands	4.3%	7.8%	11.5%	6.6%	8.0%
Three or more islands	0.4%	1.3%	1.1%	0.3%	0.9%

SHARE OF TOURISTS BY SOURCE MARKET



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	UK	Germany	Spain	Nordics	Tenerife
Average rating	8.71	8.44	8.47	8.47	8.58

Experience in the Canary Islands	UK	Germany	Spain	Nordics	Tenerife
Worse or much worse than expected	3.0%	2.5%	3.8%	1.8%	3.2%
Lived up to expectations	54.6%	54.7%	54.5%	61.7%	55.5%
Better or much better than expected	42.4%	42.8%	41.7%	36.5%	41.3%

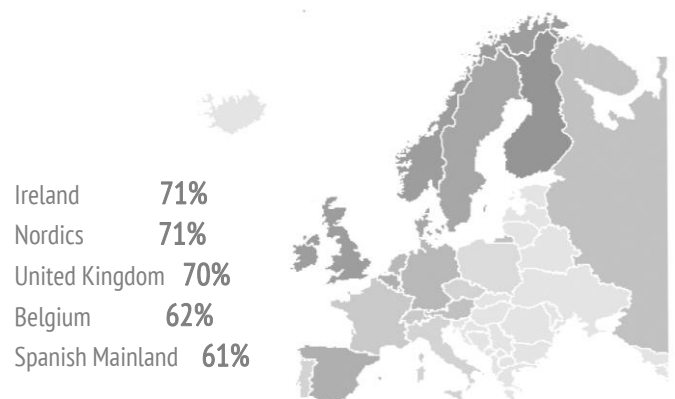
Future intentions (scale 1-10)	UK	Germany	Spain	Nordics	Tenerife
Return to the Canary Islands	8.80	8.35	8.64	8.52	8.58
Recommend visiting the Canary Islands	8.94	8.75	8.91	8.75	8.85

How many are loyal to the Canary Islands?



	UK	Germany	Spain	Nordics	Tenerife
Tenerife: Repeat tourists	70.0%	58.5%	60.5%	70.9%	61.6%
Tenerife: At least 10 previous visits	11.5%	6.2%	8.7%	6.8%	8.6%
Canary Islands: Repeat tourists	75.0%	63.5%	64.3%	77.3%	66.6%
Canary Islands: At least 10 previous visits	19.4%	12.3%	14.6%	19.4%	15.3%

TOP 5: % REPEAT TOURISTS BY MARKETS



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Where does the flight come from?



	UK	Germany	Spain	Nordics	Tenerife
United Kingdom	98.8%	0.2%	0.1%	1.9%	38.9%
Spanish Mainland	0.8%	4.2%	99.7%	0.9%	17.6%
Germany	0.0%	92.0%	0.0%	1.1%	13.9%
Belgium	0.0%	0.1%	0.0%	0.0%	3.8%
Italy	0.0%	0.1%	0.0%	0.0%	3.3%
Netherlands	0.0%	0.2%	0.0%	0.2%	2.7%
Ireland	0.3%	0.0%	0.0%	0.0%	2.4%
Poland	0.0%	0.0%	0.0%	0.2%	2.3%
Sweden	0.0%	0.2%	0.0%	29.5%	2.0%
Switzerland	0.0%	1.9%	0.0%	0.0%	1.7%
Denmark	0.0%	0.1%	0.0%	24.1%	1.7%
Finland	0.0%	0.0%	0.0%	23.6%	1.6%
Norway	0.0%	0.1%	0.0%	18.4%	1.3%
Austria	0.0%	0.3%	0.0%	0.0%	0.7%
Others	0.0%	0.9%	0.2%	0.2%	3.6%

Who do they come with?



	UK	Germany	Spain	Nordics	Tenerife
Unaccompanied	5.7%	10.1%	14.2%	6.5%	8.1%
Only with partner	45.2%	53.5%	38.8%	45.7%	45.7%
Only with children (< 13 years old)	6.1%	5.8%	9.8%	5.5%	6.7%
Partner + children (< 13 years old)	8.6%	5.1%	13.1%	5.5%	7.8%
Other relatives	13.1%	5.3%	5.6%	10.1%	10.0%
Friends	7.2%	6.2%	4.4%	4.9%	6.3%
Work colleagues	0.1%	0.4%	1.3%	0.5%	0.4%
Organized trip	0.1%	0.2%	0.6%	0.2%	0.2%
Other combinations (1)	14.0%	13.5%	12.3%	21.1%	14.8%

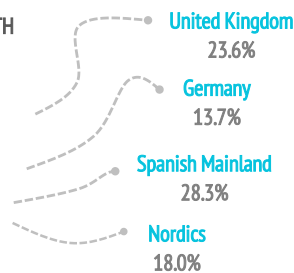
(1) Different situations have been isolated

Tourists with children	23.6%	13.7%	28.3%	18.0%	21.2%
- Between 0 and 2 years old	2.2%	1.4%	3.2%	1.5%	2.2%
- Between 3 and 12 years old	18.7%	11.5%	23.2%	14.9%	17.0%
- Between 0 -2 and 3-12 years old	2.8%	0.7%	1.9%	1.6%	2.0%
Tourists without children	76.4%	86.3%	71.7%	82.0%	78.8%
Group composition:					
- 1 person	9.4%	16.6%	17.8%	13.1%	12.8%
- 2 people	51.3%	59.4%	42.8%	53.0%	51.8%
- 3 people	14.1%	11.5%	15.8%	11.3%	13.7%
- 4 or 5 people	19.9%	11.1%	20.0%	16.5%	17.7%
- 6 or more people	5.4%	1.5%	3.6%	6.1%	4.1%
Average group size:	2.76	2.27	2.60	2.72	2.62

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
Tenerife: 21.2%



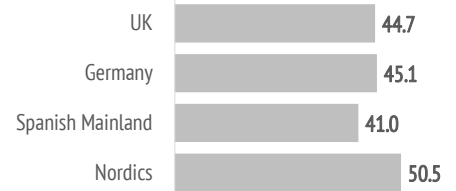
Who are they?



	UK	Germany	Spain	Nordics	Tenerife
Gender					
Men	41.7%	48.0%	51.5%	43.7%	45.9%
Women	58.3%	52.0%	48.5%	56.3%	54.1%
Age					
Average age (tourist > 15 years old)	44.7	45.1	41.0	50.5	44.3
Standard deviation	15.3	15.8	12.0	14.6	14.9
Age range (> 15 years old)					
16 - 24 years old	10.5%	9.3%	6.8%	5.5%	9.2%
25 - 30 years old	11.5%	15.7%	14.6%	6.0%	12.9%
31 - 45 years old	29.3%	24.8%	46.6%	23.4%	31.5%
46 - 60 years old	31.4%	31.6%	24.5%	35.8%	30.0%
Over 60 years old	17.3%	18.6%	7.5%	29.2%	16.3%
Occupation					
Salaried worker	61.2%	61.0%	62.7%	54.1%	57.9%
Self-employed	12.2%	8.3%	11.6%	7.0%	11.4%
Unemployed	0.7%	0.2%	3.0%	1.7%	1.3%
Business owner	4.7%	10.4%	10.3%	11.1%	9.4%
Student	3.2%	6.2%	4.3%	3.6%	4.4%
Retired	15.7%	12.5%	6.9%	21.5%	13.8%
Unpaid domestic work	1.7%	0.7%	0.7%	0.3%	1.1%
Others	0.6%	0.7%	0.4%	0.8%	0.7%
Annual household income level					
Less than €25,000	16.6%	13.0%	29.8%	8.4%	19.2%
€25,000 - €49,999	36.5%	34.8%	44.9%	28.2%	37.4%
€50,000 - €74,999	24.2%	28.9%	15.7%	31.9%	23.3%
More than €74,999	22.7%	23.3%	9.6%	31.6%	20.1%
Education level					
No studies	14.4%	0.3%	0.4%	1.8%	6.2%
Primary education	1.1%	4.0%	4.6%	5.3%	2.6%
Secondary education	18.2%	24.9%	21.1%	30.2%	22.0%
Higher education	66.3%	70.8%	73.8%	62.7%	69.2%

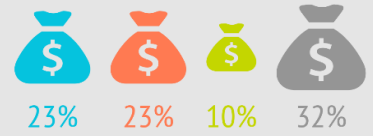


AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999

UK (blue), Germany (orange), Spanish Mainland (green), Nordics (grey)



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.