

TOURIST PROFILE BY SOURCE MARKETS (2019)

TENERIFE: MAIN SOURCE MARKETS



How many are they and how much do they spend?



	UK	Spain	Germany	Nordics	Tenerife
TOURISTS					
Tourist arrivals (FRONTUR) (*)	2.24	0.82	0.64	0.39	5.73
Tourist arrivals > 15 years old (EGT) (*)	1.97	0.73	0.58	0.33	5.04
- book holiday package (*)	1.16	0.24	0.36	0.22	2.58
- do not book holiday package (*)	0.81	0.49	0.22	0.12	2.46
- % tourists who book holiday package	59.0%	33.3%	62.6%	65.1%	51.2%

(*) Million of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE

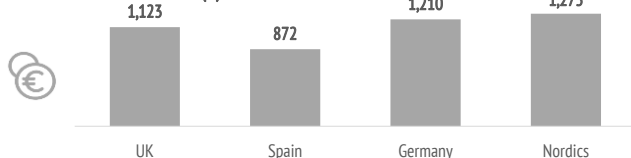


	UK	Spain	Germany	Nordics	Tenerife
Expenditure per tourist (€)	1,123	872	1,210	1,275	1,114
- book holiday package	1,281	1,085	1,318	1,313	1,268
- holiday package	1,017	827	1,085	1,033	1,008
- others	264	258	233	280	260
- do not book holiday package	896	765	1,030	1,203	952
- flight	227	197	253	363	254
- accommodation	290	248	268	399	295
- others	379	320	508	442	404
Average length of stay	8.32	6.77	10.68	9.98	8.97
- book holiday package	7.93	6.68	10.02	8.43	8.25
- do not book holiday package	8.89	6.82	11.79	12.87	9.71
Average daily expenditure (€)	146.7	142.7	125.4	146.2	139.8
- book holiday package	168.3	173.0	140.4	163.4	162.0
- do not book holiday package	115.6	127.6	100.3	114.0	116.5
Total turnover (> 15 years old) (€m)	2,212	635	700	421	5,615
- book holiday package	1,489	263	477	282	3,274
- do not book holiday package	723	372	223	139	2,341

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

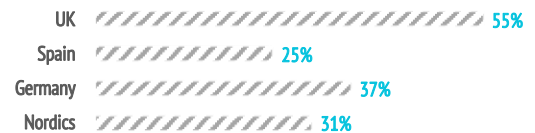


	UK	Spain	Germany	Nordics	Tenerife
Climate	82.4%	65.1%	75.5%	85.6%	77.4%
Safety	62.2%	33.0%	54.2%	39.5%	52.0%
Tranquility	45.0%	46.3%	46.2%	33.1%	45.3%
Accommodation supply	55.4%	25.5%	36.6%	31.0%	42.0%
Sea	31.2%	36.8%	53.0%	44.4%	39.5%
Price	50.2%	27.8%	29.3%	27.1%	38.8%
Landscapes	21.8%	50.2%	50.7%	28.3%	36.2%
Environment	35.0%	40.6%	31.0%	28.9%	35.7%
European belonging	33.8%	35.3%	39.1%	29.4%	35.5%
Effortless trip	42.2%	24.4%	45.7%	17.6%	34.3%
Beaches	29.3%	29.2%	30.7%	28.7%	30.8%
Fun possibilities	29.7%	25.4%	19.5%	13.1%	25.5%
Gastronomy	23.9%	25.8%	25.3%	17.7%	24.0%
Authenticity	18.4%	26.4%	20.2%	10.2%	21.0%
Exoticism	9.7%	15.6%	9.4%	7.9%	13.1%
Shopping	13.2%	7.0%	11.8%	8.4%	11.1%
Hiking trail network	4.2%	13.5%	17.9%	12.8%	10.7%
Nightlife	14.4%	7.5%	3.8%	3.1%	9.9%
Historical heritage	6.4%	14.7%	10.4%	5.7%	9.2%
Culture	7.6%	11.1%	9.3%	4.4%	8.7%

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	Spain	Germany	Nordics	Tenerife
Rest	64.1%	31.4%	36.7%	60.1%	51.7%
Enjoy family time	13.7%	24.9%	10.5%	25.5%	15.4%
Have fun	15.7%	9.0%	10.4%	4.0%	12.0%
Explore the destination	4.2%	32.1%	36.8%	8.0%	17.8%
Practice their hobbies	0.6%	1.1%	2.8%	1.1%	1.2%
Other reasons	1.8%	1.5%	2.7%	1.3%	1.8%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?



	UK	Spain	Germany	Nordics	Tenerife
The same day	0.5%	0.9%	0.5%	0.8%	0.7%
Between 1 and 30 days	18.7%	28.7%	23.3%	27.1%	23.6%
Between 1 and 2 months	19.4%	28.6%	22.8%	24.4%	22.5%
Between 3 and 6 months	32.3%	31.6%	34.3%	31.4%	32.5%
More than 6 months	29.2%	10.3%	19.2%	16.4%	20.6%

Source: Encuesta sobre el Gasto Turístico (ISTAC).

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 (2019)

TENERIFE: MAIN SOURCE MARKETS



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

	UK	Spain	Germany	Nordics	Tenerife
Previous visits to the Canary Islands	59.7%	35.5%	45.9%	56.7%	48.5%
Friends or relatives	30.9%	34.6%	26.1%	19.3%	30.3%
Internet or social media	54.9%	50.7%	53.9%	53.7%	53.4%
Mass Media	1.8%	1.2%	2.5%	1.7%	1.7%
Travel guides and magazines	5.6%	3.4%	14.6%	6.0%	7.4%
Travel Blogs or Forums	4.4%	8.7%	5.6%	2.7%	6.1%
Travel TV Channels	0.9%	0.2%	1.4%	0.2%	0.8%
Tour Operator or Travel Agency	20.2%	18.5%	27.5%	16.2%	20.2%
Public administrations or similar	0.3%	1.1%	0.4%	0.2%	0.4%
Others	2.7%	3.8%	2.9%	2.6%	2.8%

* Multi-choise question

With whom did they book their flight and accommodation? 🗣️

	UK	Spain	Germany	Nordics	Tenerife
Flight					
- Directly with the airline	46.1%	54.6%	29.8%	37.5%	47.1%
- Tour Operator or Travel Agency	53.9%	45.4%	70.2%	62.5%	52.9%
Accommodation					
- Directly with the accommodation	32.8%	40.1%	18.8%	30.2%	34.1%
- Tour Operator or Travel Agency	67.2%	59.9%	81.2%	69.8%	65.9%

Where do they stay? 🛏️

	UK	Spain	Germany	Nordics	Tenerife
1-2-3* Hotel	9.7%	9.6%	12.5%	10.2%	9.7%
4* Hotel	37.2%	37.5%	44.2%	34.7%	36.6%
5* Hotel / 5* Luxury Hotel	14.6%	12.2%	8.0%	6.4%	11.6%
Aparthotel / Tourist Villa	25.6%	13.5%	14.2%	32.3%	21.7%
House/room rented in a private dwelling	3.4%	7.2%	7.1%	3.7%	6.2%
Private accommodation (1)	4.3%	16.0%	9.3%	3.8%	8.5%
Others (Cottage, cruise, camping,...)	5.2%	4.0%	4.8%	8.9%	5.7%

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

What do they book? 🗣️

	UK	Spain	Germany	Nordics	Tenerife
Room only	27.4%	24.3%	17.3%	35.9%	27.9%
Bed and Breakfast	13.4%	16.4%	11.8%	21.5%	14.9%
Half board	19.3%	28.4%	40.1%	15.5%	23.4%
Full board	2.2%	8.6%	1.8%	3.2%	3.4%
All inclusive	37.7%	22.3%	29.0%	23.9%	30.3%

30.3% of tourists book all inclusive.



38%
UK



29%
Germany



22%
Spanish Mainland



24%
Nordics

Other expenses 📍

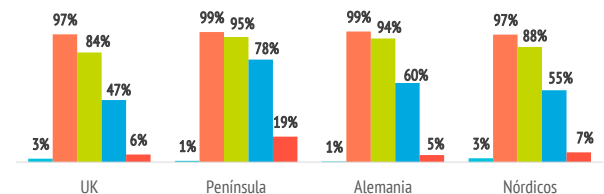
	UK	Spain	Germany	Nordics	Tenerife
Restaurants or cafes	55.6%	74.5%	50.8%	58.1%	58.4%
Supermarkets	46.1%	42.3%	49.8%	52.5%	48.2%
Car rental	7.2%	54.5%	34.4%	17.3%	24.1%
Organized excursions	14.0%	28.4%	28.2%	13.3%	20.1%
Taxi, transfer, chauffeur service	54.3%	22.3%	45.8%	52.9%	43.4%
Theme Parks	8.6%	22.0%	11.2%	4.8%	11.3%
Sport activities	4.8%	4.5%	5.0%	1.8%	4.6%
Museums	0.6%	4.4%	3.2%	1.7%	2.2%
Flights between islands	2.8%	5.7%	3.4%	2.7%	3.7%

Activities in the Canary Islands 🚶

Outdoor time per day	UK	Spain	Germany	Nordics	Tenerife
0 hours	2.6%	1.0%	0.5%	2.9%	1.7%
1 - 2 hours	13.8%	3.7%	5.3%	9.4%	8.5%
3 - 6 hours	36.3%	17.3%	34.0%	32.9%	30.6%
7 - 12 hours	41.5%	58.7%	54.8%	47.3%	49.8%
More than 12 hours	5.8%	19.4%	5.4%	7.5%	9.3%

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	Spain	Germany	Nordics	Tenerife
Walk, wander	73.6%	76.3%	60.7%	73.2%	71.6%
Beach	53.4%	63.1%	68.6%	56.8%	60.5%
Swimming pool, hotel facilities	71.3%	51.3%	38.4%	62.7%	59.9%
Explore the island on their own	30.1%	62.6%	58.8%	45.9%	45.4%
Taste Canarian gastronomy	18.0%	43.8%	33.0%	18.1%	24.8%
Theme parks	19.9%	31.4%	27.9%	12.5%	23.1%
Organized excursions	17.1%	17.5%	24.2%	15.4%	19.0%
Nightlife / concerts / shows	24.8%	15.3%	8.6%	10.8%	17.8%
Sea excursions / whale watching	14.1%	14.1%	18.1%	7.4%	14.9%
Sport activities	10.7%	9.9%	17.1%	10.9%	12.4%
Nature activities	4.5%	19.9%	18.2%	13.2%	11.6%
Activities at sea	8.2%	9.6%	13.4%	4.1%	9.4%
Wineries / markets / popular festi	6.1%	14.2%	10.6%	9.7%	9.2%
Museums / exhibitions	3.6%	12.7%	7.7%	6.7%	7.2%
Beauty and health treatments	5.6%	5.1%	4.3%	7.6%	5.6%
Astronomical observation	2.6%	5.4%	7.1%	7.9%	4.4%

* Multi-choise question



TOURIST PROFILE BY SOURCE MARKETS (2019)

TENERIFE: MAIN SOURCE MARKETS



Which places do they visit in Lanzarote?



	UK	Spain	Germany	Nordics	Tenerife
Parque Nacional del Teide	15.6%	56.6%	56.7%	31.2%	37.2%
Santa Cruz (capital de la isla)	10.5%	51.8%	39.1%	21.5%	27.9%
La Laguna (Ciudad Patrimonio de la Humanidad)	4.3%	43.4%	25.2%	9.3%	17.7%
Acantilado de los Gigantes	4.0%	41.7%	17.8%	8.9%	16.5%
La Orotava	3.0%	37.3%	23.6%	8.0%	15.0%
Garachico	3.0%	34.4%	20.6%	6.0%	14.7%
Icod de los Vinos (Drago Milenario)	2.9%	36.0%	21.2%	6.7%	14.3%
Barranco de Masca	2.7%	18.9%	18.7%	8.8%	11.7%
Parque rural de Anaga	2.0%	21.9%	19.9%	4.7%	10.3%
Teno / Buenavista	1.3%	12.5%	16.1%	3.7%	6.9%
Barranco del Infierno	0.9%	7.6%	5.1%	2.1%	3.6%

”

4 in 10 tourists in Tenerife visit Parque Nacional del Teide

Internet usage during their trip



	UK	Spain	Germany	Nordics	Tenerife
Research					
- Tourist package	16.8%	13.0%	15.8%	9.8%	15.6%
- Flights	18.0%	9.5%	12.6%	10.4%	13.9%
- Accommodation	21.3%	12.1%	19.0%	11.7%	17.5%
- Transport	18.9%	12.3%	16.4%	12.4%	16.9%
- Restaurants	30.3%	31.5%	25.8%	31.6%	30.2%
- Excursions	24.2%	24.2%	31.7%	28.4%	26.8%
- Activities	28.3%	27.6%	33.4%	30.6%	30.4%
Book or purchase					
- Tourist package	41.9%	24.3%	41.6%	53.6%	36.9%
- Flights	65.4%	72.6%	54.5%	75.3%	67.0%
- Accommodation	56.6%	60.1%	41.7%	69.1%	57.0%
- Transport	43.8%	55.6%	36.1%	60.2%	46.9%
- Restaurants	13.0%	17.6%	7.9%	16.7%	13.5%
- Excursions	11.2%	25.7%	15.5%	19.1%	15.9%
- Activities	16.0%	26.1%	15.1%	16.1%	18.3%

* Multi-choice question

Internet usage in the Canary Islands	UK	Spain	Germany	Nordics	Tenerife
Did not use the Internet	11.0%	5.6%	6.9%	6.0%	8.5%
Used the Internet	89.0%	94.4%	93.1%	94.0%	91.5%
- Own Internet connection	31.6%	64.1%	37.0%	34.8%	39.7%
- Free Wifi connection	42.7%	16.4%	40.8%	36.3%	35.6%
Applications*					
- Search for locations or maps	54.7%	76.9%	68.5%	63.7%	64.6%
- Search for destination info	43.9%	42.9%	51.6%	53.1%	45.6%
- Share pictures or trip videos	56.4%	56.3%	54.0%	50.4%	56.7%
- Download tourist apps	5.3%	5.9%	7.7%	9.1%	6.7%
- Others	23.6%	13.6%	17.9%	28.0%	19.2%

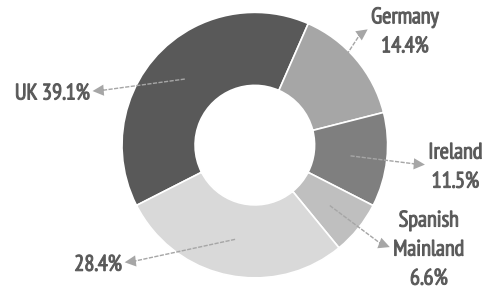
* Multi-choice question

How many islands do they visit during their trip?



	UK	Spain	Germany	Nordics	Tenerife
One island	95.3%	88.2%	91.1%	93.6%	92.0%
Two islands	4.4%	10.7%	7.6%	6.1%	7.2%
Three or more islands	0.3%	1.1%	1.3%	0.3%	0.9%

SHARE OF TOURISTS BY SOURCE MARKET



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	UK	Spain	Germany	Nordics	Tenerife
Average rating	8.80	8.56	8.57	8.43	8.66

Experience in the Canary Islands	UK	Spain	Germany	Nordics	Tenerife
Worse or much worse than expected	2.5%	3.6%	2.4%	1.5%	2.8%
Lived up to expectations	52.6%	51.9%	54.3%	64.3%	54.1%
Better or much better than expected	44.9%	44.5%	43.4%	34.1%	43.1%

Future intentions (scale 1-10)	UK	Spain	Germany	Nordics	Tenerife
Return to the Canary Islands	8.93	8.73	8.56	8.52	8.68
Recommend visiting the Canary Islands	9.06	8.95	8.88	8.71	8.92

How many are loyal to the Canary Islands?



	UK	Spain	Germany	Nordics	Tenerife
Tenerife: Repeat tourists	71.2%	62.3%	60.6%	69.7%	62.4%
Tenerife: At least 10 previous visits	11.2%	8.9%	8.2%	8.7%	9.1%
Canary Islands: Repeat tourists	77.3%	65.4%	66.9%	77.2%	68.1%
Canary Islands: At least 10 previous visits	18.2%	15.9%	16.1%	20.0%	15.8%

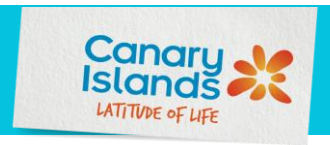
TOP 5: % REPEAT TOURISTS BY MARKETS

UK	71%
Nordics	70%
Belgium	68%
Ireland	63%
Spanish M.	62%



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TENERIFE: MAIN SOURCE MARKETS



Where does the flight come from?



	UK	Spain	Germany	Nordics	Tenerife
United Kingdom	98.2%	0.0%	1.7%	0.0%	39.4%
Spanish Mainland	1.0%	3.6%	0.7%	99.8%	19.1%
Germany	0.3%	92.6%	1.1%	0.0%	11.5%
Belgium	0.0%	0.1%	0.0%	0.0%	3.9%
Netherlands	0.0%	0.1%	0.0%	0.0%	3.0%
Italy	0.0%	0.0%	0.1%	0.1%	3.0%
Ireland	0.2%	0.0%	0.0%	0.0%	2.5%
Poland	0.0%	0.1%	0.1%	0.0%	2.4%
France	0.0%	0.0%	0.1%	0.0%	1.9%
Sweden	0.0%	0.0%	26.9%	0.0%	1.8%
Finland	0.0%	0.0%	24.1%	0.0%	1.6%
Denmark	0.0%	0.2%	24.2%	0.0%	1.6%
Switzerland	0.0%	2.5%	0.1%	0.0%	1.5%
Norway	0.0%	0.0%	20.8%	0.0%	1.4%
Others	0.1%	0.8%	0.1%	0.1%	5.3%

Who do they come with?



	UK	Spain	Germany	Nordics	Tenerife
Unaccompanied	6.3%	13.4%	11.6%	7.2%	8.9%
Only with partner	50.2%	37.4%	51.7%	49.0%	47.4%
Only with children (< 13 years old)	5.2%	9.1%	4.8%	7.3%	6.3%
Partner + children (< 13 years old)	6.2%	13.1%	4.8%	5.5%	6.8%
Other relatives	12.1%	6.3%	6.3%	7.4%	9.7%
Friends	7.1%	6.5%	6.6%	4.9%	6.6%
Work colleagues	0.2%	1.5%	0.8%	0.4%	0.6%
Organized trip	0.2%	0.1%	0.3%	0.3%	0.3%
Other combinations (1)	12.4%	12.4%	13.0%	18.0%	13.5%

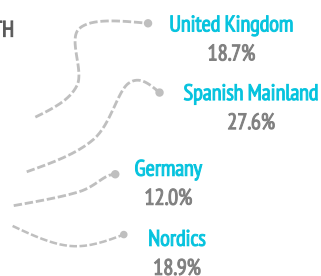
(1) Different situations have been isolated

Tourists with children	18.7%	27.6%	12.0%	18.9%	18.9%
- Between 0 and 2 years old	1.8%	2.1%	1.8%	1.7%	1.9%
- Between 3 and 12 years old	14.8%	23.4%	9.1%	15.5%	15.3%
- Between 0 -2 and 3-12 years old	2.0%	2.1%	1.1%	1.6%	1.7%
Tourists without children	81.3%	72.4%	88.0%	81.1%	81.1%
Group composition:					
- 1 person	10.5%	16.5%	17.7%	12.8%	13.7%
- 2 people	56.8%	43.1%	58.9%	53.9%	53.9%
- 3 people	11.0%	15.2%	11.1%	10.9%	12.0%
- 4 or 5 people	17.1%	21.4%	11.4%	18.4%	16.8%
- 6 or more people	4.6%	3.8%	0.9%	4.1%	3.7%
Average group size:	2.61	2.69	2.23	2.59	2.54

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
Tenerife: 18.9%



Who are they?



	UK	Spain	Germany	Nordics	Tenerife
Gender					
Men	41.1%	54.2%	50.4%	48.9%	47.0%
Women	58.9%	45.8%	49.6%	51.1%	53.0%
Age					
Average age (tourist > 15 years old)	45.7	40.9	45.6	51.2	44.9
Standard deviation	15.7	12.1	15.6	15.3	15.2
Age range (> 15 years old)					
16 - 24 years old	9.1%	7.4%	8.6%	4.6%	8.4%
25 - 30 years old	13.0%	15.2%	13.7%	8.7%	13.5%
31 - 45 years old	26.7%	45.8%	26.7%	21.6%	30.5%
46 - 60 years old	31.4%	24.5%	32.0%	33.0%	29.8%
Over 60 years old	19.8%	7.1%	18.9%	32.0%	17.8%
Occupation					
Salaried worker	58.6%	62.1%	59.6%	50.0%	57.0%
Self-employed	11.8%	12.6%	9.7%	9.2%	11.9%
Unemployed	1.3%	2.7%	0.3%	0.9%	1.4%
Business owner	5.2%	10.5%	11.0%	11.0%	9.1%
Student	2.8%	4.6%	4.2%	3.0%	3.7%
Retired	18.9%	6.2%	13.6%	25.2%	15.3%
Unpaid domestic work	0.9%	0.8%	0.6%	0.5%	0.8%
Others	0.5%	0.6%	0.9%	0.3%	0.8%
Annual household income level					
Less than €25,000	19.9%	27.2%	12.8%	8.2%	20.4%
€25,000 - €49,999	36.1%	45.5%	39.0%	27.1%	37.9%
€50,000 - €74,999	21.1%	16.5%	25.6%	31.1%	21.2%
More than €74,999	22.9%	10.8%	22.5%	33.7%	20.5%
Education level					
No studies	14.6%	0.2%	0.5%	1.0%	6.2%
Primary education	0.7%	3.5%	4.1%	5.8%	2.3%
Secondary education	19.0%	20.2%	26.6%	31.5%	22.8%
Higher education	65.7%	76.1%	68.8%	61.6%	68.7%



AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC).

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