

## INTRODUCTION

The following report contains a summary of the positioning of the island of Tenerife in relation to the star tourism product. The document is structured into the following sections:

### **1.- DESTINATION ANALYSIS**

- 1) Tenerife as a top-class tourist destination
- 2) Star tourism in Tenerife: Background
- 3) Analysis of the star tourism offer
- 4) Promotion and commercialisation of the star tourism offer
- 5) Other tourist activities

### **2.- ANALYSIS OF THE DEMAND**

- 1) Profile of the visitor to Tenerife
- 2) Main characteristics of the tourist who visits Tenerife and has taken some stargazing activity

### **3.- CONCLUSIONS AND RECOMMENDATIONS FOR THE FUTURE OF THE ACTIVITY**

## 1.- DESTINATION ANALYSIS

### 1) TENERIFE, top-class tourist destination

The island of Tenerife is the largest Canary island. Tenerife is a traditional sun and sand tourist destination, which has almost 400 km of coastline and around 70 km of beaches, besides a unique natural environment and an exceptional climate, with an average annual temperature of 23 degrees Celsius. Likewise, almost 50% of the island territory is protected, with 43 protected areas: a national park (Teide National Park), four integral natural reserves, six special natural reserves, a natural park, two rural parks, fourteen natural monuments, nine protected landscapes and six sites of scientific interest. These protected territories are the resource on which many nature tourism products are based and, therefore, they receive a large number of tourists every year, doing different activities.

Tenerife is an island that is only between two and four hours by plane from the main tourist source markets: Germany, the United Kingdom and the rest of Spain. It has two airports, one in the north of the island, mostly for national flights, and another in the south, mostly for international flights. It also has two sea ports, one in the south of the island and another larger one in the capital, which also allows for cruise-liner tourism besides access by boat. Therefore, and on all levels, Tenerife is very well connected in spite of being an island.

Likewise, the island has a modern motorway network and lots of public transport –taxis and buses and trams– in the metropolitan area, besides a wide range of companies that offer car rental services (34.3% of tourists use a car to move around the island). Therefore, within Tenerife, accessibility and connectivity between tourist and non-tourist areas is optimal.

Regarding accommodation, the island has 132,525 beds, of which 81,709 are in hotels and 49,375 non-hotel, with almost 90% of them in Adeje and Arona. There are other towns on the island that also have accommodation, although to a lesser degree, such as the towns of Puerto de la Cruz and Santiago del Teide. These hotel establishments are mostly three- and four-star hotels with a large variety of activities and services within their facilities. It is, largely, modern accommodation with quality standards that are –in many cases– guaranteed by official certificates (Q de Calidad, EMAS, ISO, Biosphere, etc.). There is also significant five-star hotel accommodation on the island.

This traditional accommodation is complemented by options in the country, including 553 country hotels and 888 country houses.

## 2) Star tourism in Tenerife: Background

Over recent years, stargazing activity has been added to the tourist activity options. The island has the main resource, which is the sky, which is of exceptional quality. Not in vain was the Teide National Park chosen as the site for the Izaña Observatory, which centres its studies on the sun and has the best European telescopes. This observatory provides guided tours for groups and schoolchildren all year round, it has information panels around it and audiovisual resources providing astronomical information.

Likewise, the Instituto de Astrofísica de Canarias (IAC) established rules and conditions for intelligent lighting and effective protection of astronomical observation two decades ago, when it drew up the Sky Law in 1988. To put this law into practice, the Sky Quality Protection Technical Office was created in 1992, to control and assess the pollution generated by incorrect lighting.

Besides these outstanding resources that Tenerife has for strengthening development of the activity, Mount Teide has been certified as a Starlight Tourism Destination since 2013 and the Peaks of Tenerife as a Starlight Reserve. This certification, given by the Starlight Foundation, (it is considered an associated action by the UNESCO and has the support of the International Astronomical Union (IAU) and the World Tourism Organization (UNWTO)) aims to defend the quality of the night skies and general right to be able to observe the stars, emphasising the value that this heritage has for science, education, the environment and tourism around the world. Likewise, it involves a participative action plan and a group of recommendations aimed at preserving the quality of the sky.

Separately, and in order to provide support and strengthen the development of this product and its connection to the existing landscape, seven informational boards were designed and placed in the National Park (situated at the viewing points of Minas de San José, Tabonal Negro, Roques de García, Los Azulejos, Llano de Ucanca and in the car park at the Juan Évora Museum), which constitute an Astrovolcanic route, which allows the visitor to contemplate the scenery of the National Park, either with or without a guide, and to travel to diverse places in the solar system.

## 3) Analysis of the star tourism offer

This background and the existence of these resources linked to star tourism has favoured the development of activities and services surrounding this product. Services providing guided tours with stargazing are currently on offer not only by the Izaña Observatory but also by at least 10 companies, including the El Cardón Naturexperience, Discover experience, Astroamigos and Star excursions. These companies offer tourists this astronomical activity, which sometimes includes not only the guided tour but also a ride up on the cable car, contemplating the sunset, and a supper or other activities related to astronomy (Volcano Life Experience). Most of the guided tours offer the tourist the possibility of looking at the moon and its reliefs, highlighting the Montes Teneriffe; the stars, differentiating between the young and old stars and showing some constellations and, on some occasions, Jupiter and its satellites.

#### 4) Promotion and commercialisation of the star tourism offer

The promotion and marketing of these tourist products takes place mostly over the internet. The companies publish their activities using their own websites, independently, or jointly with the public administration on the Tenerife Tourism Corporation website.

#### 5) Other tourist activities

With regard to complementary tourist products, over the past few years and with the review of the tourist strategy for Tenerife, the development of diverse activities and products linked to nature and local identity has begun to be promoted and reinforced. On the island, given its favourable climate, all kinds of activities can be done in the open air 365 days a year. The services on offer go from nature activities (hiking, mountain-biking, cycle tourism, hang gliding, etc.) to water activities (surfing, diving, snorkelling, whale and dolphin watching, etc.) to enjoying a wide range of culture and gastronomy using local products.

## 2.- ANALYSIS OF THE DEMAND

### 1) Profile of the general visitor to the island

Tenerife is the island with the greatest number of tourists accommodated, with over five million tourists in 2014 – specifically 5,148,453 tourists–, which meant a 3.5% increase in people accommodated for the island with respect to 2013. The United Kingdom, Spain and German are the main countries of origin and the tourist has an average age of 47.71 and stays for an average of 7.68 days. He or she is a tourist who stands out for his or her high degree of loyalty to the destination with 60.6% of tourists having been to the island on more than one occasion and having a degree of satisfaction of 8.5 out of 10.

Just over half the tourists book their holidays using a tourist package and the cost, although it varies depending on where they are coming from, is an average of €112 a day, about 70% of which are costs at source.

55.9% of tourists enjoy some activity during their stay on the island, with visits to theme parks (28.8%), hiking (16%), dolphin/whale watching (11.5%), and taking the cable car up the Teide (10.9%) being those that are done most.

### 2) Main characteristics of the tourist who visits Tenerife and has taken some stargazing activity

The demand for tourism products relating to star tourism has been in constant growth over the past few years.

In 2014, 2.1% of tourists who visited the island did this activity during their stay—an estimated 100,000 tourists. Furthermore, the number of tourists who went stargazing increased 29% with respect to 2013.

Stargazing is one of the tourist activities experiencing most growth on the island, above others of more weight these days.

The tourist who comes to observe the night skies is around 42 years old on average, and under-31s are the largest group. They usually travel to Tenerife as a couple, although there are also significant numbers who travel alone or with friends. For 59%, 2014 was their first visit to the island, while 41% were repeating, so their loyalty index is much lower than that of the average visitor (60.6%).

### 3.- CONCLUSIONS ON THE CURRENT STATUS OF THE PRODUCT AND ITS POSSIBILITIES FOR FUTURE DEVELOPMENT IN TENERIFE

The analysis of the supply and demand for star tourism on the island of Tenerife is evidence of a product experiencing growth due to the interest it awakens in tourists who visit us. The dynamisation work with the different agents linked to the activity is important now that it is at the initial stages, in order to work in a coordinated and agreed manner, towards a sustainable and even eco-friendly product, respecting the natural areas in which the activity takes place

The development of this product may bring significant benefits to the island, not only as regards financial profit but also for repositioning its image, as it strengthens the image of specialisation and differentiation of what's on offer, and also the added value of the resources, which is intended as part of the destination's tourist strategy.

Currently and through this European project, the development of the product is being promoted, working in coordination with the different companies that perform the activity, with the creation of a package that integrates the different activities relating to stargazing, along with other offers of activities and services linked to our volcanic origins and the culture and heritage of Tenerife.