General Guidelines Marketing and Communication Plan

Tenerife Tourist Destination

2021

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Introduction to the Marketing Plan

The Tenerife destination marketing plan aims to create a working tool that serves to address the new challenges facing Tenerife as a tourism destination.

The document includes all the main objectives for the destination that aim to make Tenerife a world-leading tourist destination, contributing to the generation of wealth and social well-being. This plan, together with a monitoring and defined KPI system, will allow us to evaluate behaviours and adapt the objectives if necessary.

"MAKE TENERIFE A WORLD-LEADING TOURIST DESTINATION"

1. 2-YEAR PLAN

The main focus of the Tenerife destination marketing plan is to create an action plan to define, establish and build the new positioning of the brand over the next 2 years and make Tenerife a world-leading tourism destination.

2. A SINGLE DOCUMENT

This document should serve to unify all the criteria for action, creating a unique strategy for the Tenerife brand that allows us to prioritise investment by market which serves to work in synergy across all the destination's products.

3. ROUTE MAP

The objective is to develop an informative document to communicate to all stakeholders of the destination's new positioning and the new general lines of action that will be implemented by all the areas of interest.

Methodology and process for elaborating the Marketing Plan

ANALYSIS | **STRATEGIC DEFINITION** | **PLAN AND IMPLEMENTATION**

INTERNAL VISION FOR THE BRAND	EXTERNAL VISION: CUSTOMERS AND MARKET REALITY	DEFINITION OF BRAND POSITIONING	APPLYING THE POSITIONING	MARKETING AND COMMUNICATION PLAN
Achieve a **consensual vision** on outlook and expectations for the brand	Understand the **external reality** with wide-ranging analysis with a factual and systematic approach	Specify the **positioning** in a concrete and useful business document	Definition of **implementation guidelines** by areas of interest	Define a **MKT plan and lines of action** to enhance the implementation of the **brand strategy**

Objective

Main activities

- Collection of all available information
- Work meetings, one-to-one interviews, training sessions and island visit
- Understanding the market
- Analysis of trends in the tourism sector
- Competitor análisis and positioning
- Identification and incorporation of best practices in the national and int. sector
- SWOT analysis
- Identify gaps between current and ideal content
- Define new positioning and brand values
- Establish Marketing Plan challenges
- Definition of priority targets
- Selection and prioritization of target countries
- Intermediate working sessions with stakeholders
- Incorporate feedback from stakeholders
- Define positioning by country
- Definition of key activities
- Create a roadmap and processes
- Presentation of the new plan
- Preparation of an informative document for stakeholders

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Marketing Plan Index - General

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Key points on which we will focus

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01. CURRENT CHALLENGES AND OBJECTIVES

Definition of the objectives to be achieved with the Tenerife Tourism destination marketing plan

1.1 Business objectives

1.2 Communication objectives

Tenerife's current challenges

Before defining the objectives, note that Tenerife must implement a new strategic approach that adapts to the new global socio-economic situation and the transformation that the tourism sector is undergoing.

All this together with the trends and new habits that are being generated around the way people travel.

There are a number of challenges for Tenerife as a tourism destination that we have to take into account when drawing up the new route for tourism on the island.

1

NEW PROPOSAL FOR COMMUNICATION

There are many destinations that offer the same things as the Island in terms of Sun and Beach. We must find a way to differentiate ourselves that allows us to go further and communicate all the "jewels" the island possesses.

2

PROFIT FROM INVESTMENT IN INFRASTRUCTURE

High investment in a new type of hotel and in exclusive premium activities, different from the existing tourism, which leads us to search for a higher quality target and change/ expand profiles.

3

CONQUER NEW TRAVELLER PROFILES

Traveller profile older than the average age in Spain, over 45 years, which makes the destination less attractive for some tourists, who choose other options.

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1.1. Definition of objectives

Starting from the general objectives of the island, we have broken them down into two types: business objectives and communication objectives.

GENERAL OBJECTIVES

"CONSOLIDATE TENERIFE AS AN INTERNATIONAL BENCHMARK AS A TOURISM DESTINATION"

BUSINESS GOALS		**COMMUNICATION GOALS**	
INCREASE IN TOURISM REVENUE		DIFFERENTIAL COMMUNICATION BEYOND SUN AND BEACH	
INCREASE IN DESTINATION EXPENDITURE	INCREASE IN OVERNIGHT STAYS	NEW POSITIONING	TARGET REJUVENATION

1.1. Definition of objectives: business goals

INCREASE IN TOURISM REVENUE

INCREASE in PROFITABILITY

DIVERSIFICATION OF TRAVELLERS

Attracting new types of travellers.

Increase in customers with higher income levels.

DIVERSIFICATION OF SOURCING TYPE

Increase in direct customers.

Increased spending by customers and tour operators.

INCREASE in OVERNIGHTS

REACTIVATION IN MATURE COUNTRIES

Diversification of messages.

Micro-segmentation by interests and products..

COUNTRY DIVERSIFICATION

Definition of priority countries.

Type of messages.

1.2. Definition of objectives: communication goals

COMMUNICATE ALL THE VIRTUES OF TENERIFE
BEYOND THE SUN AND BEACH

NEW
BRAND POSITIONING

TARGET
REJUVENATION

DIFFERENTIAL COMMUNICATION

A more emotional message.

Integration of all the products in the communications.

NEW FORMS OF COMMUNICATION

More digital.

More content.

DE-SEASONALISATION OF TRAVELLERS

Focus on new segments of travellers.

Micro-segmentation of messages.

MORE EMOTIONAL COMMUNICATION

Friendlier, more personal,
more digital communication.

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03. TRENDS AND IDENTIFICATION OF INSIGHTS

Analysis of consumer and market insights

3.1 Trends in the travel sector

3.2 The travelling process

3.3 New types of travellers

3.4 Analysis of processes and types of travellers by country

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3.1 Trends in the travel sector

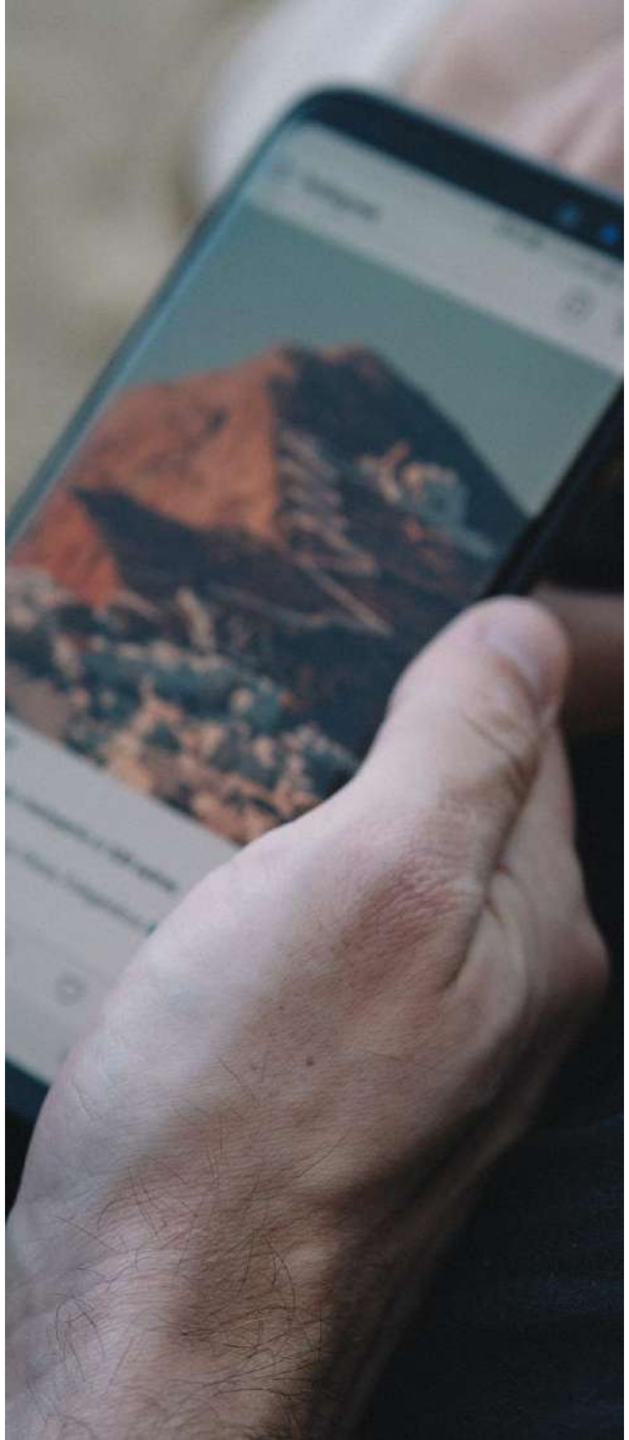
In recent years our society has been immersed in a series of changes
caused by the acceleration of the digital world.

From how we see ourselves as people to how we relate to each other or our perception of the weather, the notion of true and false has changed, everything has changed, there are no defined patterns.

In 2019, we saw how parameters such as gender or masculinity have been refocused, how the environment has paralysed all of us with increasingly alarming signs and how cities continue to grow at a dizzying rate and the effect this has on our lives.

In the next section we focus on those trends that have affected us the most in our way of living and how to approach them as brands.

3.1 Trends in the travel sector



1 Digitisation

Social networks and connected devices have fostered the creation of services and platforms for the 21st century traveller. From agencies to digital assistants, everything is now possible to improve the traveller's experience from the palm of their hand.

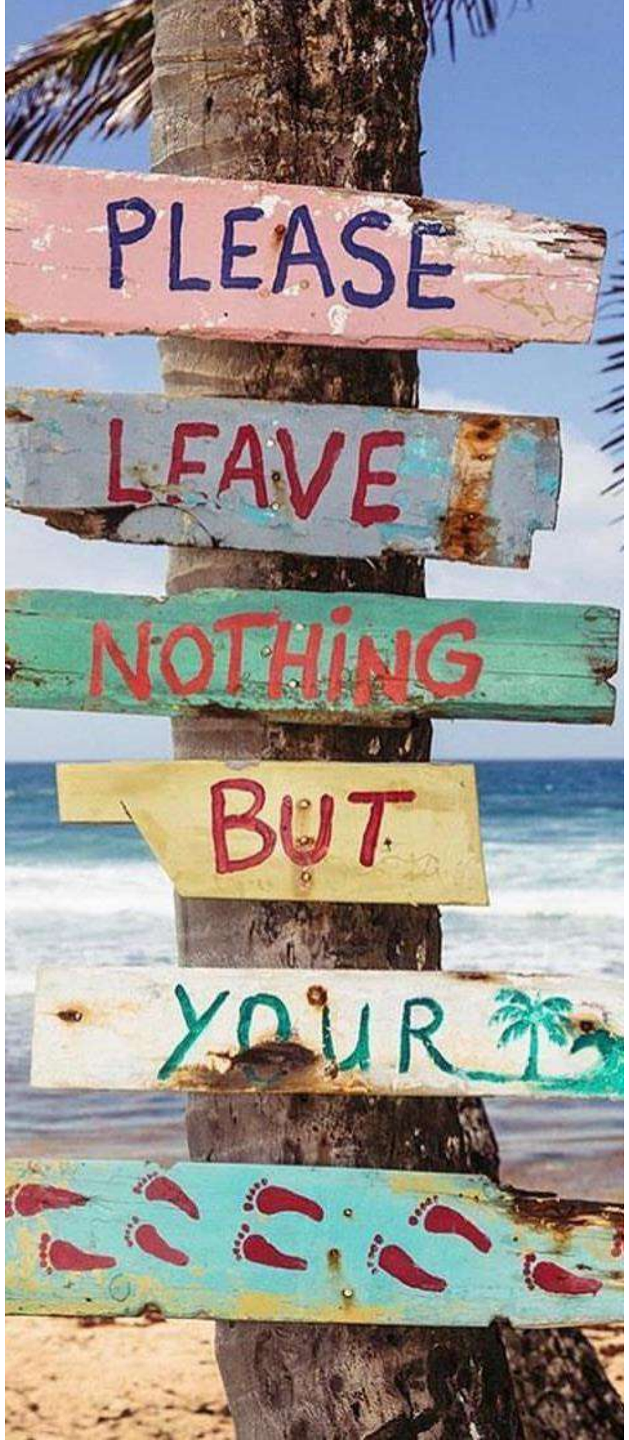
2 Innovative services

This new traveller model gives rise to a series of demands and these are transferred to services and products in the industry.

3.1 Trends in the travel sector

3 Sustainable tourism

Climate change and the environmental impact on destinations have become the centre of attention and concern for travellers. A lot of debate is being generated about the advantages and disadvantages of tourism and whether or not it needs to be controlled.



4 New traveller models

Our notion of a traveller has changed. The new concept of tourism focuses on discovery, on escaping into the unknown… an adventure. This change is creating new travel agencies focused on young people looking for a unique experience.

CONCLUSIONS

1. Offering experiences: Experiences are the destination of the new traveller, from a state of mind to what a destination currently offers, this traveller is always seeking more than just a stay. The transformative capacity of a destination depends on these experiences.

2. Personalisation: Each traveller is different and expects the destination to offer them something that complements them, this is why it is necessary to offer a wide variety of experience options (sport, relaxation, etc.) that adapt to them and their way of travelling (individually, as a couple, etc).

3. Local Authenticity: Culture, traditions and authenticity are fundamental keys to making the destination stand out. Today's tourism seeks to immerse itself in the local culture and enjoy it as part of its destination experience, it is part of the heritage of travel that will build its identity for the future and is a way of preserving the local environment in the face of the overcrowding of destinations.

4. Digitisation of services: The traveller increasingly seeks greater comfort and accessibility to services, digitisation is not an option, it is the current standard of any industry. Mobile phones have become the new tour guide, travel agency and even the new hotel receptionist.

Implications

It is necessary to make the variety of services and possibilities that the island offers visible in order to attract more than one model of traveller.

Innovate on communication platforms to keep up with the demands from today's digital consumer who uses them to choose their next holiday destination

3.2 The travelling process

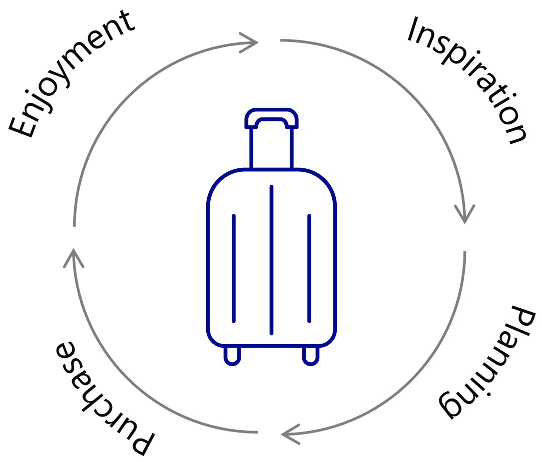
Embarking on a journey is a process made up of several parts that a consumer has to experience right up until they return from it. Within this same process, the consumer goes through important stages of decision making such as: Where am I going? Am I paying too much? Will I like it? Will it be easy to get around once I'm there? All of these consumer issues can be transformed into destination opportunities to help them decide.

3.2 The travelling process

With a different process for each type of traveller

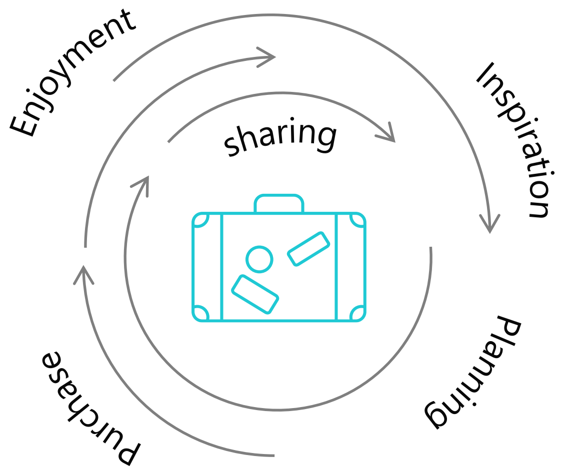
TOURISTS

A more standardised and traditional process consisting of fewer phases. This usually involves cases where travel agencies play a fundamental role in the decision-making.



TRAVELLERS

A less standardised and current process where the traveller seeks their own information and shares their experience beyond the trip itself.



The new travelling process

When deciding to embark on a journey, everyone goes through 4 steps. The variables that act on each of these steps are made up of rational and emotional elements. Over the years, this process has evolved and has become more sophisticated with the arrival of the internet and technology, which allow us to have more rational information and more emotional inputs to decide on the final destination of the trip.

1. INSPIRATION

The time when you dream, wish and imagine what your next destination will be like and what experiences await you.

RATIONAL EMOTIONAL

2. PLANNING

When is the best time to go, which route will I take, which recommendations are the most persuasive, etc.

RATIONAL EMOTIONAL

3. PURCHASE

It is time to buy the tickets. A moment of nerves as to whether you are making good purchase decisions and of adrenaline as you are embarking on a new adventure.

RATIONAL EMOTIONAL

4. ENJOYMENT

Enjoying the trip in your own way, making the most of every minute, generating unforgettable memories and sharing them.

RATIONAL EMOTIONAL

3.2 The travelling process. Points of view: emotional and rational

Traveller enjoyment as a key element in influencing potential new travellers

Creation of a universe of emotions and building imagery relating to the destination

Need to generate content and index it around the moments of inspiration

4. ENJOYMENT

Enjoying the trip in your own way, making the most of every minute, generating unforgettable memories and sharing them.

1. INSPIRATION

It is time to dream, wish and imagine what your next destination will be like and what experiences await you.

3. PURCHASE

It is time to buy the tickets. A moment of apprehension to whether you are making a good decision and a feeling of adrenaline as you embark upon a new adventure.

2. PLANNING

When is the best time to go, which route to take, which recommendations are the most persuasive, etc.

Impeccable purchase experience: Accessibility, usability, access to info, payment methods, after-sales

Taking advantage of new communication and transaction channels to facilitate the process for users

Curating information and prescribing capabilities to create a personalised experience

3.2 The travelling process

There are 2 types of people who travel

	TOURISTS Visit destinations	TRAVELLERS Experience places	
INSPIRATION	• Rational sources of inspiration	• The enjoyment of the journey begins with inspiration	**INSPIRATION**
PLANNING	• High degree of trip planning • Seek security in the relationship between expectation and reality	• Search a lot of information beforehand • Carried away by intuition to build their expectations	**PLANNING**
PURCHASE	• Rational purchase based on comparison • Purchase package holidays	• Emotional purchase • The product is built by them	**PURCHASE**
ENJOYMENT	• Standardised offering • Predefined experience • Defined route	• A non-standard product • The experience is built on the go without pre-established routes	**ENJOYMENT**

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3.3 New types of traveller

If we define two types of travel processes, it means there is more than one type of traveller within these categories. People who go on a trip, but with different objectives. Some seek an adventure, some relaxation, others want to share the experience with others and some just want to disconnect from their reality.

Today's traveller is complicated and consists of many variables that, as a destination, we have to know how to detect and attack in order to attract those who can enjoy the island as a destination.

3.3 New types of traveller

Travellers' motivations and triggers

As we have seen, we are faced with a new model of travel consumer. This new consumer lives in a highly technological society with a strong social component that pushes them to get out of their routine and experience their travel moments to the utmost.

Their motivations when undertaking a trip consist of several factors that come together later when deciding on a destination:

RATIONAL

BREAK THE ROUTINE REST

- Family
- Household chores
- Hustle and bustle

BREAK THE ROUTINE ACTIVITIES

- Bad weather
- Work
- Sedentary lifestyle

EMOTIONAL

SOCIAL AND COMMUNITY

- Visit trending places
- Be part of a social community
- Acceptance in a circle

EXPERIMENTATION AND GROWTH

- Discover new places
- Try activities
- Experience different cultures
- Sensory pleasure

3.3 New types of traveller

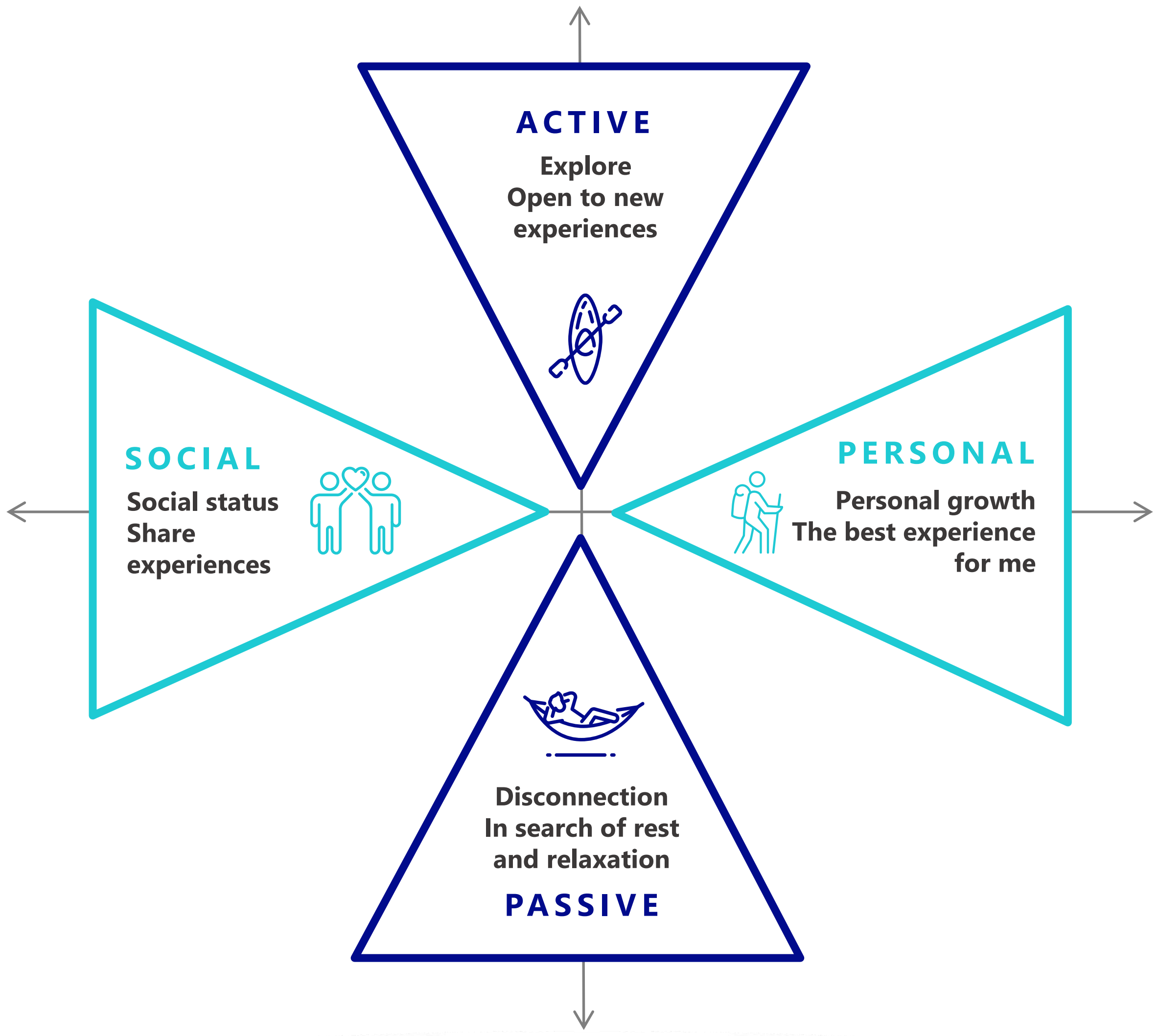
Every travel experience has a part of these 4 emotional components:

Based on these four traveller motivations, we can build a matrix based on two axes.

A vertical axis with rational motivations, where we differentiate the level of activity with which a trip is planned: from the most active to the most passive.

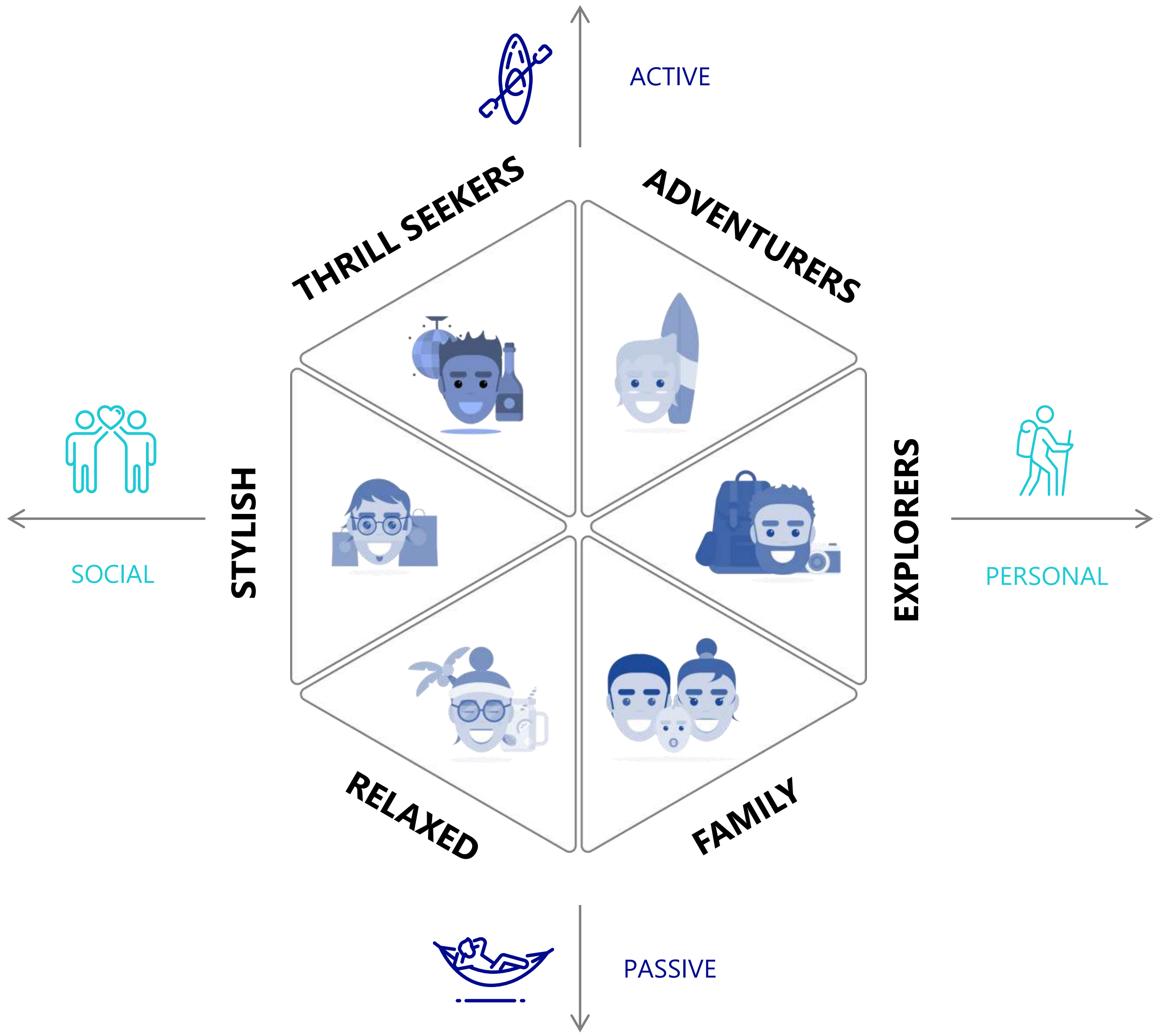
A second horizontal axis with the more emotional motivations, where we differentiate the components we relate to the construction of social status or the personal creation of identity.

Source:: CCS 2019



3.3 New types of traveller

6 segments created from experiences related to emotional motivations



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What the Adventurer is like...

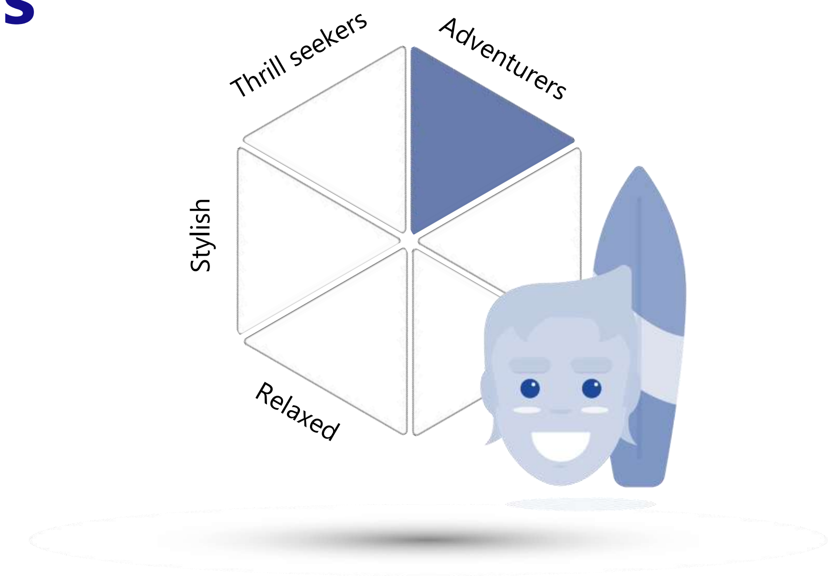
This is a very active experiential profile.

High interest in sports and adventure activities, visiting natural areas and routes, and sporting events. We can also mention courses, cruises and camping. On the other hand, they have very little interest in cultural events, art and culture.

Demographics: Individuals from 25 to 40 years old. Intermediate education. Young, middle-class. High number of students and less qualified workers.

Consume fewer general products, but for certain products such as sports or adventure, they spend a lot.

Not predominant in any one area.



QUANTIFICATION

Worldwide: 106m 11%
Europe: 38m 13%

SOCIODEMO PROFILE

25 to 40 years
M: 65% / F: 35%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Nature: i158
- Sports: i137
- Urban Tourism: i105
- Nightlife: i94
- Sun and Beach: i86
- Golf: i85
- Food: i82
- Art and Culture: i75
- Shopping: i68
- Big Events i68
- Health and Wellbeing: i52

Source: CCS 2018

What the Explorer is like...

Eager to learn about new cultures and how people from other places live, see monuments and works of art, have experiences, discover landscapes, discover new places, open their mind and learn.

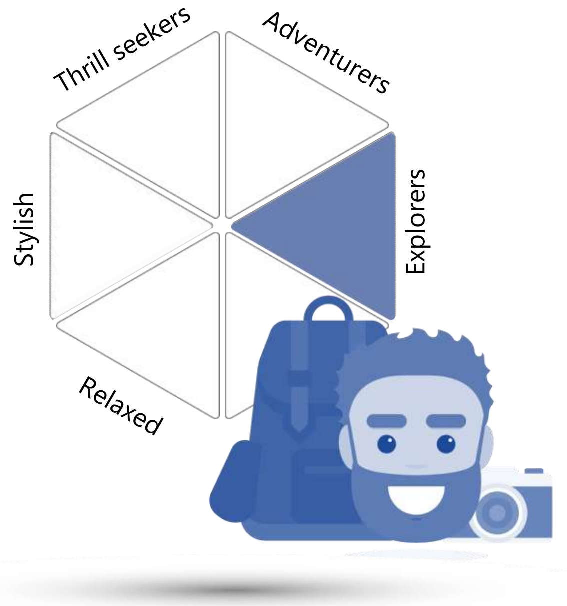
Demographics: Has completed higher education, middle-aged. There is a high percentage of self-employed people, students and entrepreneurs.

Motivation Factors: Qualities associated with the destination: Existence of historical and cultural sires, the environment, landscapes.

What matters least are beaches, a warm climate, tranquillity and the quality of the accommodation.

Not too concerned with price or security.

Evenly distributed across the different markets. Relatively important in Southern Europe and Latin America. By countries, the following stand out: France, Turkey and Brazil.



QUANTIFICATION

Worldwide: 284m 29%
Europe: 86m 29%

PERFIL SOCIODEMO

40 to 60 years
M: 62% / F: 38%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Food: i160
- Urban Tourism: i154
- Art and Culture: i130
- Nature: i112
- Shopping: i95
- Big Events: i95
- Sports: i89
- Sun and Beach: i75
- Health and Wellness: i75
- Golf: i70
- Nightlife: i60

Source: CCS 2018

What the Family traveller is like...

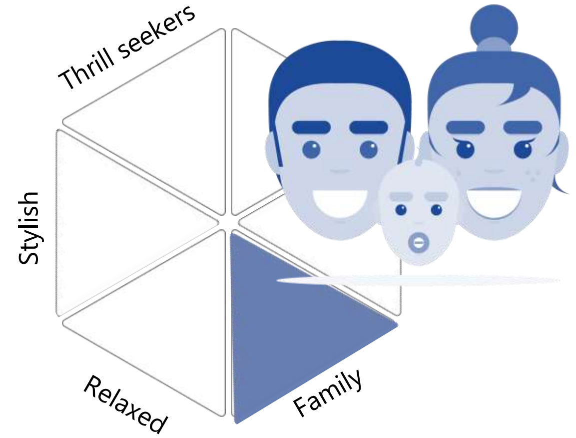
Their reasons for travelling are: spending time with their partner and family. They are not interested in social activities, having new experiences, disconnecting or adventure.

Socio-demographically: Individuals from 30 to 49 years old. With mediumlow level qualifications and professionally active.

Visiting capital cities, the environment and cultural heritage are not so important. With relatively little sensitivity to price. They are looking for security, tranquillity and being treated well.

No distinctive consumption of tourist products. Do fewer activities than average.

Especially prevalent in emerging countries and somewhat less in the distant mature markets. Eastern European countries stand out.



QUANTIFICATION

Worldwide: 215m 22%
Europe:58m 20%

SOCIODEMO PROFILE

30 to 49 years old
M: 51% / F: 49%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Sun and Beach: i126
- Shopping: i115
- Health and Wellness: i104
- Art and Culture: i102
- Golf: i97
- Sports: i93
- Urban Tourism: i90
- Nightlife: i87
- Big Events: i87
- Nature: i85
- Food: i80

Source: CCS 2018

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What the Relaxed traveller is like...

Their reasons for the trip are: to rest, enjoy good weather, have fun and spend time with their partner and family. Practically nothing else interests them.

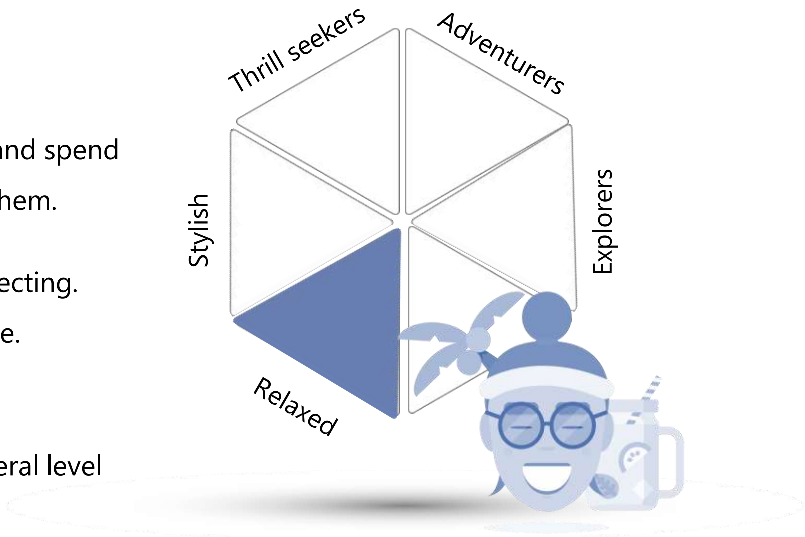
It all comes down to relaxation, fun, sun, partner/family and disconnecting. They are not interested in sights, culture, or the landscape and nature.

Demographics: An adult and elderly profile and their social status is significantly lower than the other clusters. They have the lowest general level of studies.

The climate, the quality of the accommodation, the price, the beaches and the tranquillity are the main focus.

The other characteristics of the destination are not attractive. They are not interested in cultural heritage or the environment. They are looking for a beach destination with a good temperature, that is competitive in terms of price and has above-average hotel quality.

Comes from central and northern Europe. Marginal presence in Latin America, emerging markets and Southern Europe.



QUANTIFICATION

Worldwide: 152m 15%
Europe: 54m 18%

SOCIODEMO PROFILE

55 years +
M: 42% / F: 58%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Sun and Beach: i160
- Health and Well.ness i135
- Shopping: i102
- Nature: i73
- Food: i69
- Nightlife: i65
- Golf: i60
- Big Events: i59
- Art and Culture: i53
- Urban Tourism: i48
- Sports: i46

Source: CCS 2018

What the Stylish traveller is like...

This is a very experience-based profile characterised by their interest in luxury, urban tourism, cuisine and shopping. They have low interest in rural tourism, camping, nature and the beach.

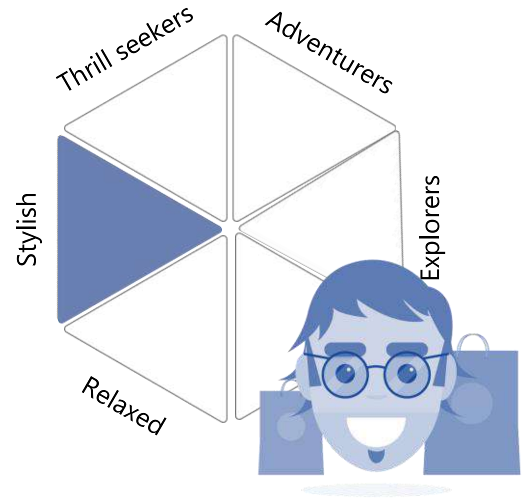
The reasons for their trip are: spending time with their partner and friends enjoying very special moments that make them feel special. They seek exclusive experiences and vacations or a certain degree of exclusivity to be able to share their status.

They buy more products than other travellers, especially luxury items.

Demographics: A segment with a high status. It is made up of graduates with a high income. With a high number of entrepreneurs and self-employed workers.

Give relative importance to the sun, good weather and landscapes.

A segment more present in distant and emerging markets than in Europe. Relatively important in Latin America and Eastern Europe. Japan, Brazil and Mexico. Very little weight in Germany, China and India.



QUANTIFICATION

Worldwide: 106m 11%
Europe: 38m 13%

SOCIODEMO PROFILE

35 to 55 years old
M: 38% / F: 62%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Shopping: i157
- Golf: i142
- Nightlife: i142
- Food: i130
- Health and Wellness: i126
- Sun and Beach: i110
- Art and Culture: i108
- Big Events: i106
- Nature: i98
- Urban Tourism: i98
- Sports: i90

Source: CCS 2018

What the Thrill seeker is like...

The reasons for their trip are: to do something exciting, with some adventure and even risk, to visit places that are fashionable and to practice and enjoy their hobbies.

We could summarise them in five motivations: Adventure, what's hot, hobbies, fun and nature.

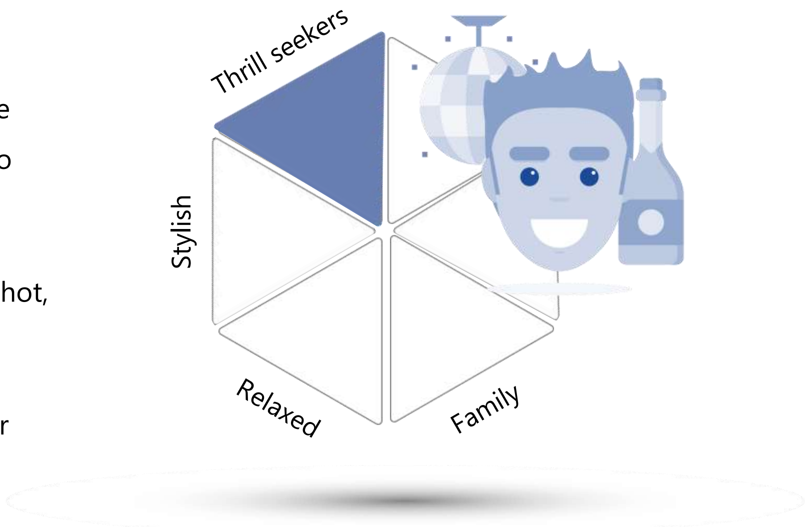
Independent, they do not seek to spend time with their partner or family.

They are not motivated by visiting the sights or works of art.

Demographics: This is the youngest segment, with high educational levels. High number of students and few homemakers and pensioners.

Motivational factors: variety of services and activities, price and quality of the restaurants; less focused on cultural heritage, the climate or the beaches. They spend mainly on sports and events at the destination.

Mostly present in distant mature markets. Especially in Asia Pacific. Hardly present in Eastern Europe.



QUANTIFICATION

Worldwide: 137m 14%
Europe: 35m 12%

SOCIODEMO PROFILE

18 to 35 years old
M: 48% / F: 52%

Source: CCS 2019

AFFINITY WITH PRODUCTS

- Nightlife: i130
- Big Events: i117
- Sports: i110
- Sun and Beach: i97
- Nature: i94
- Shopping: i89
- Urban Tourism: i80
- Food: i76
- Health and Wellness: i60
- Art and Culture: i60
- Golf: i36

Source: CCS 2018

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3.3 New types of traveller

Matrix

		EXPLORERS	FAMILY	RELAXED	ADVENTURERS	THRILL SEEKERS	STYLISH
Tenerife NO LIMIT	Sports	yoy:89	yoy:93	yoy:46	yoy:137	yoy:110	yoy:90
	Nature	yoy:112	yoy:85	yoy:73	yoy:158	yoy:94	yoy:98
Tenerife GOLF	Golf	yoy:70	yoy:97	yoy:60	yoy:85	yoy:36	yoy:142
Tenerife SELECT	Shopping	yoy:95	yoy:115	yoy:102	yoy:68	yoy:89	yoy:157
	Wellness	yoy:75	yoy:104	yoy:135	yoy:52	yoy:60	yoy:126
Tenerife FOOD	Food	yoy:160	yoy:80	yoy:69	yoy:82	yoy:76	yoy:130
Tenerife DESTINATION	Urban Tourism	yoy:154	yoy:90	yoy:48	yoy:105	yoy:80	yoy:98
	Art and Culture	yoy:130	yoy:102	yoy:53	yoy:75	yoy:60	yoy:108
	Nightlife	yoy:60	yoy:87	yoy:65	yoy:94	yoy:130	yoy:142
	Sun and Beach	yoy:75	yoy:126	yoy:160	yoy:86	yoy:97	yoy:110

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3.4 Analysis by country

In each country, all the types of traveller we have defined above coexist. Culture is one of the main factors that defines the percentage of each one and, of course, economic status.

With this analysis by country we break down the travelling population in each one and how they behave when travelling. We will also list their average consumption and which points of contact are of interest to them when embarking on a journey.

An in-depth analysis that will allow us to define certain behaviour patterns to adapt the type of communication to each of the countries.

3.4 Analysis by country

Matrix

	EXPLORERS	FAMILY	RELAXED	ADVENTURERS	THRILL SEEKERS	STYLISH
UNITED KINGDOM	31% (yoy:107)	7% (yoy:37)	28% (yoy:142)	13% (yoy:118)	9% (yoy:80)	12% (yoy:156)
SPAIN	28% (yoy:103)	24% (yoy:111)	11% (yoy:60)	17% (yoy:134)	13% (yoy:104)	7% (yoy:91)
GERMANY	27% (yoy:99)	20% (yoy:93)	20% (yoy:109)	16% (yoy:126)	13% (yoy:104)	4% (yoy:52)
FRANCE	40% (yoy:147)	20% (yoy:93)	15% (yoy:82)	10% (yoy:79)	10% (yoy:80)	5% (yoy:65)
ITALY	28% (yoy:103)	22% (yoy:102)	14% (yoy:77)	11% (yoy:87)	18% (yoy:144)	7% (yoy:91)
DENMARK	19% (yoy:70)	24% (yoy:111)	19% (yoy:104)	14% (yoy:110)	16% (yoy:128)	8% (yoy:104)
NORWAY	24% (yoy:88)	22% (yoy:102)	16% (yoy:88)	15% (yoy:118)	12% (yoy:96)	11% (yoy:143)
SWEDEN	21% (yoy:77)	25% (yoy:116)	19% (yoy:104)	11% (yoy:87)	14% (yoy:112)	10% (yoy:130)
FINLAND	21% (yoy:77)	21% (yoy:97)	22% (yoy:120)	19% (yoy:149)	11% (yoy:88)	6% (yoy:78)
IRELAND	29% (yoy:107)	8% (yoy:37)	26% (yoy:142)	15% (yoy:118)	13% (yoy:80)	12% (yoy:156)
NETHERLANDS	28% (yoy:109)	19% (yoy:88)	22% (yoy:120)	14% (yoy:110)	19% (yoy:104)	4% (yoy:52)
AUSTRIA AND SWITZERLAND	27% (yoy:99)	20% (yoy:93)	20% (yoy:109)	16% (yoy:126)	13% (yoy:104)	4% (yoy:52)
BELGIUM	29% (yoy:107)	21% (yoy:97)	19% (yoy:104)	8% (yoy:63)	16% (yoy:128)	7% (yoy:91)
PORTUGAL	28% (ia :102)	24% (yoy:111)	11% (yoy:60)	14% (yoy:110)	17% (yoy:136)	6% (yoy:77)
RUSSIA	28% (yoy:109)	26% (yoy:116)	19% (yoy:116)	6% (yoy:53)	7% (yoy:56)	16% (yoy:138)
POLAND	22% (yoy:98)	26% (yoy:126)	20% (yoy:118)	7% (yoy:55)	7% (yoy:55)	9% (yoy:109)
OT/EUE	30% (yoy:109)	26% (yoy:120)	20% (yoy:109)	7% (yoy:55)	5% (yoy:40)	12% (yoy:155)
JAPAN	38% (yoy:115)	25% (yoy:117)	12% (yoy:98)	6% (yoy:66)	15% (ia92)	4% (yoy:46)
USA	26% (yoy:78)	24% (yoy:112)	16% (yoy:131)	11% (yoy:122)	16% (yoy:98)	7% (yoy:81)
CANADA	28% (yoy:84)	24% (yoy:112)	14% (115)	17% (yoy:188)	10% (yoy:61)	7% (yoy:81)
ISRAEL	30% (yoy:100)	18% (yoy:112)	14% (115)	6% (yoy:66)	18% (yoy:110)	16% (ia184)
CHINA	27% (yoy:81)	25% (yoy:117)	12% (yoy:98)	6% (yoy:66)	18% (yoy:110)	12% (yoy:139)
INDIA	35% (yoy:106)	16% (yoy:75)	11% (yoy:90)	8% (yoy:88)	15% (yoy:92)	15% (yoy:173)
SOUTH KOREA	40% (yoy:121)	22% (yoy:103)	10% (yoy:82)	6% (yoy:66)	18% (yoy:110)	4% (yoy:46)

04. NEW POSITIONING

A more emotional positioning,
focused on a new type of traveller

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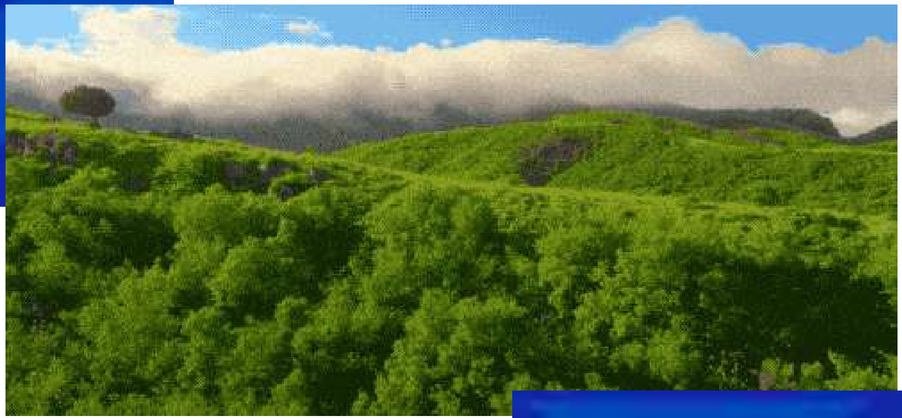
4.1 Analysis of the competitive environment

There are 2 types of communications for tourist destinations...

Those that are oriented towards communicating about a destination based entirely on the landscape and natural resources, which leave aside the essence of the destination from an emotional perspective and those that focus on people, emotions, the relationship with the destination's culture.

THOSE THAT HAVE VIDEOS WITH DRONES



... THOSE THAT DON'T

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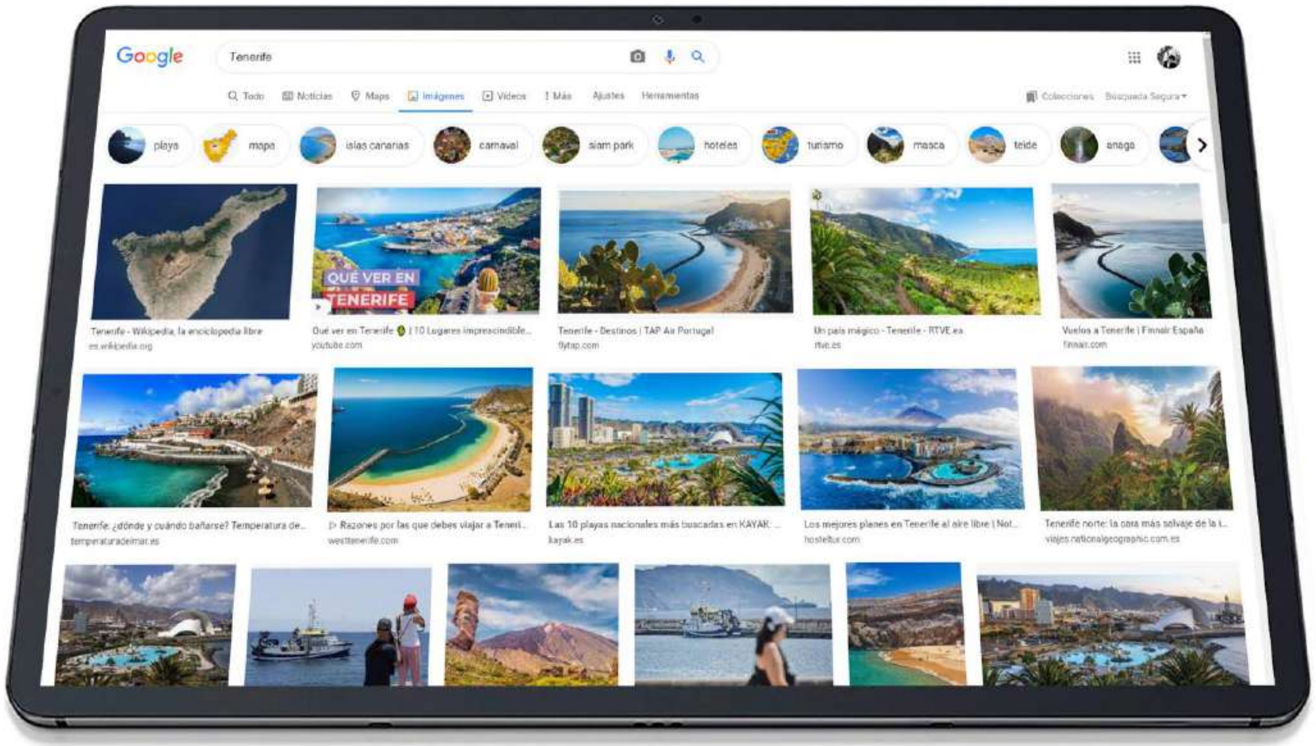
4.2 Analysis Analysis of Tenerife’s communications

The first image many travellers see of the island as a destination is the one they find on the internet, especially in the destination’s networks and spaces. This first image, how easy it is for them to access what they are looking for and what they expect from this experience can determine whether they opt for a holiday destination or rule it out.

The importance of the image projected by the brand is as relevant as the destination itself, and this is why we have analysed the spaces in which the brand moves and how it communicates with its potential consumers.



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… do we want to be just one more destination with drone videos?

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4.2.1 Image analysis

What image does Tenerife currently project?

To carry out this analysis, we analysed the 236 photographs that make up the image bank, the 2018 promotional video for the island, posts on social networks, as well as the 35 campaigns promoting the areas abroad and the economic promotion referred to in the creative portfolio.

We have decided to focus this study on two main parameters:

IMAGE ANALYSIS

6 indicators have been taken into account:

- Image temperature.
- Image framing and composition.
- Movement.
- Expression or behaviour of the protagonists in the image.
- Credibility of the situation.
- Alignment with the values of today's society (storytelling of the image).

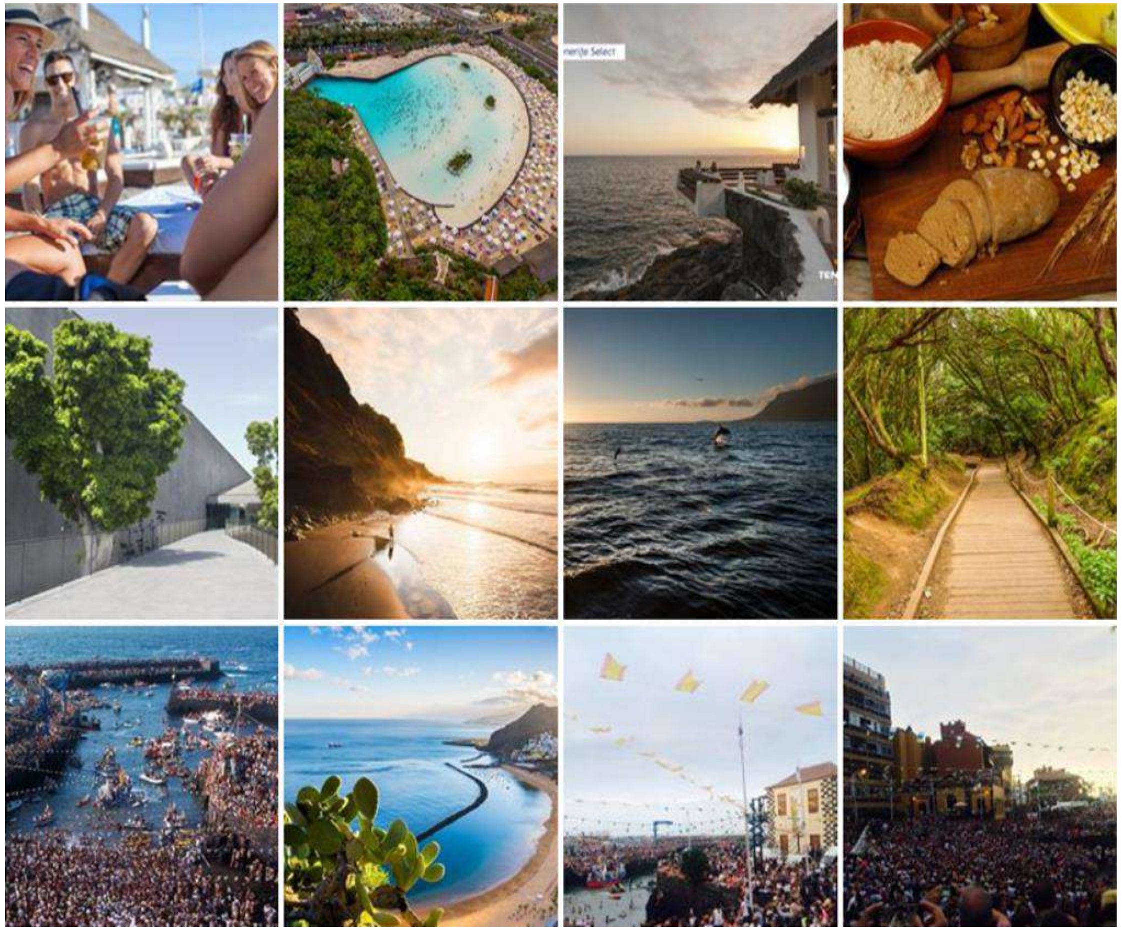
EMOTION ANALYSIS

4 indicators have been taken into account:

- The people in the image and their attitude towards their surroundings.
- Their position in the image.
- Type of image depending on the activity being carried out in it.
- Relationship with products.

4.2.2 Tone analysis

Where we are

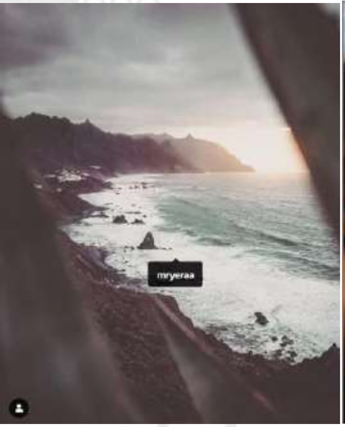


Social networks as of 24 July 2019



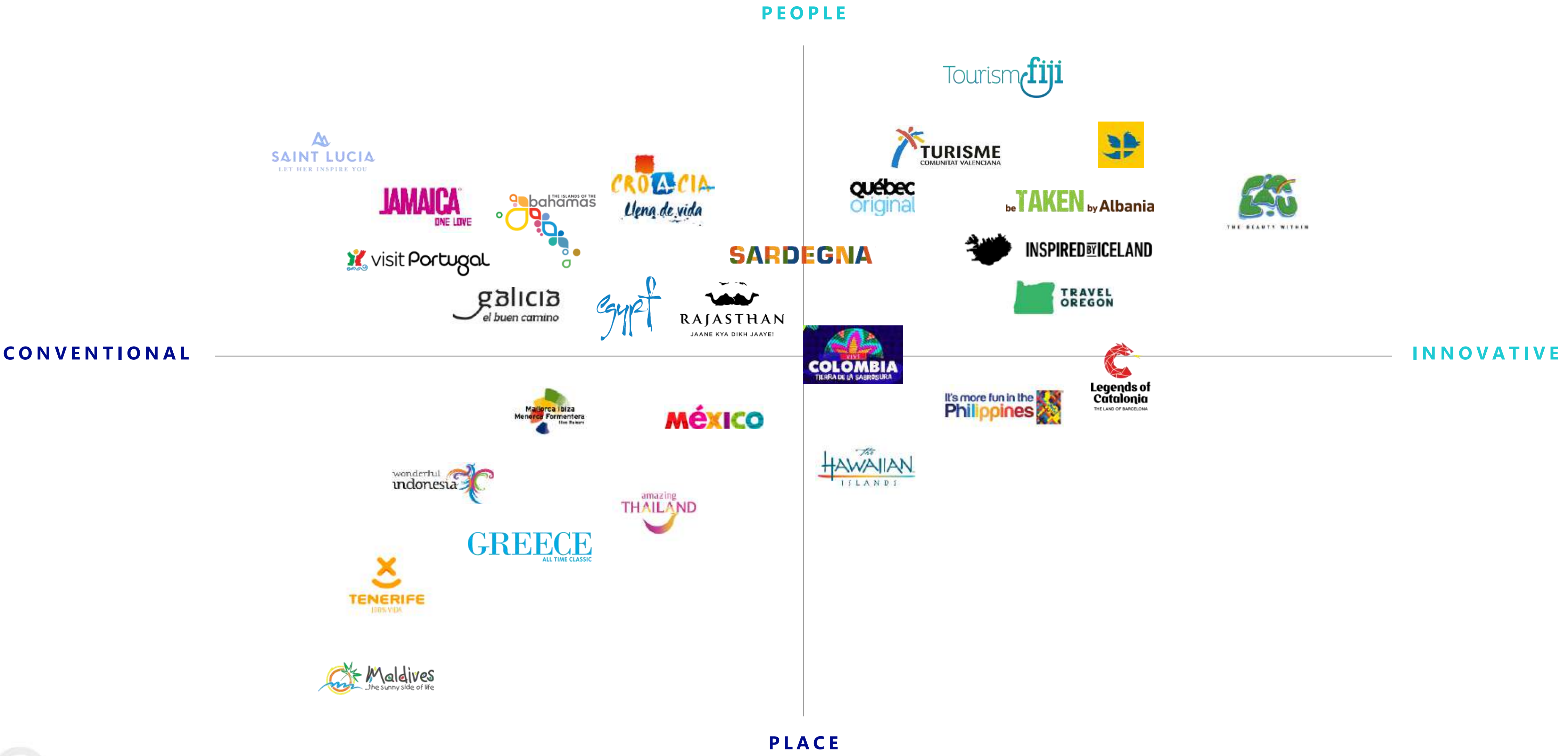

WHERE WE WANT TO BE (REAL IMAGES #TENERIFE INSTAGRAM)






4.2.2 National and international positioning



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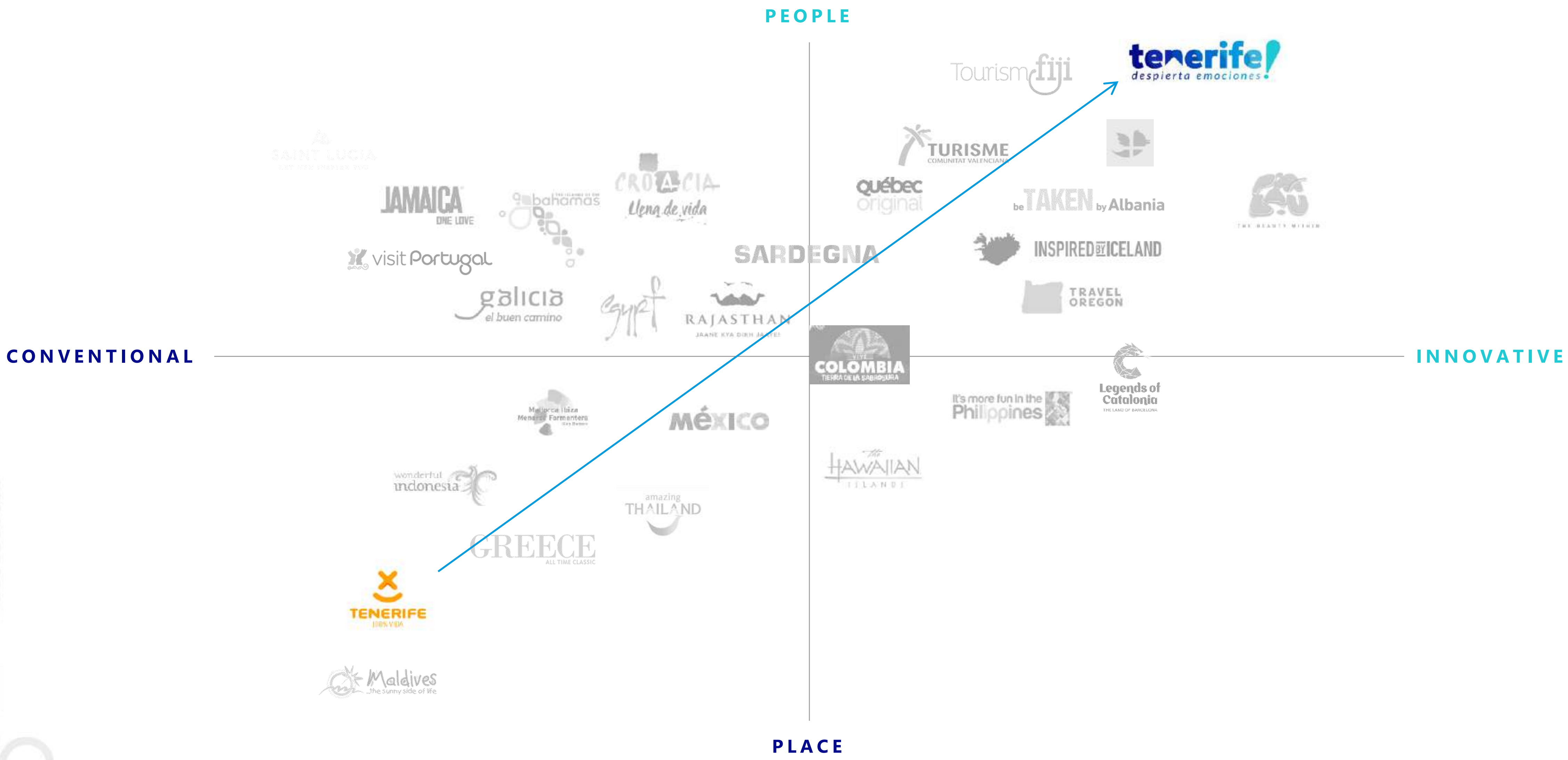
4.2.2 National and international positioning



CONCLUSIONS

1. We start from a position that primarily shows brand images and communication of Tenerife as a sun and beach destination with a selection of images of places and landscapes of the island. However, this relays little differentiation from its competitors and in some degree, lacks authenticity and genuine warmth elements that are increasingly in demand when selecting holiday destinations.

2. We have, as a destination, a great holiday and cultural offering that is sometimes relegated to the background and that must take on a greater presence in order to attract other types of travellers.

3. Neither the conventional advertising nor the image bank serving the media focus on emotion and memorable experiences. The destination prevails over people and their feelings.

4. Postcard photography VS Instagram photography. The behaviour is not natural which creates an invisible barrier. It does not psychologically transfer you to the story that you can write and star in on the island.

Implications

We detect great opportunities when considering a repositioning of the brand, making Tenerife a destination with a greater personality, with a friendlier tone that is more in line with the current needs of the new types of travellers.

There must be coherence between objective and image.

4.3 Communication strategy

The new positioning must meet the objective of making
Tenerife an international benchmark for island destinations through different, personal and innovative communication.

It must allow the brand to easily and simply implement any action that helps achieve both business and communication objectives.

To do this, it is essential to establish the pillars on which this new position must be based.

Goals of good positioning

PEOPLE

Transmit the transforming effect that the island has on people.

We want to convey values that are closer to personal purposes

EMOTIONAL

Less rational and more emotional communication.

Communication that helps us turn tourists into travellers and that allows us to grow by attracting new travellers.

PARTICIPATORY

To transmit the magic of the island from within, from its people, from its hidden gems.

Participatory communication involving the people of Tenerife.

Global vision of tourism on Tenerife

CHALLENGE — Give depth to Tenerife as an excellent tourist destination with greater diversity beyond Sun and Beach

OBJECTIVE — Bringing Tenerife closer as a world of experiences and emotions that is just a click away

BRAND PILLARS

EMOTIONS	EXPERIENCES	DIGITAL	SUSTAINABLE
Elevate brand communication and bring an emotional approach. A living brand that must be adapted to the moment and o the person.	A different way of communicating that allows us to transmit the diversity of the jewels the island has in a friendly and real way. Something memorable.	A current, modern, versatile language and tone that allows us to reach people in very diverse places.	Adapted to the future, to the new motivations of travellers, but always respecting the destination, its environment and its people.

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4.4 Proposal for a new positioning

We will now define the proposal of the repositioning of Tenerife as a tourism destination. A proposal that will change the general image of the island today by connecting more with people’s emotions and become more trendy and current. We will communicate the diversity of the destination and include local citizens to showcase the activities.

4.4 Proposal for a new positioning

"Tenerife is a unique destination, and coming prepared does not imply that you will not find surprises waiting for you around every corner. Bring your suitcase packed and return with it packed full of emotions. Explore your limits and discover those of others on an island full of paradises, a unique destination that will offer you the possibility of getting to know Mount Teide, laurel woods, thermophile forests, delicious cuisine, routes full of mysticism and millions of adventures on which to grow personally. A place made by the people, by its people, by everyone.

Emotions start the moment you decide to visit us, but they grow as you get to know us.

Because travelling can open your heart and expand your mind, but, above all, because it is capable of filling your life with emotions and stories to tell".

Tenerife… awakens emotions!

4.4 Proposal for a new positioning

TENERIFE

awakens emotions

Until now, the island has had a very generic image in the minds of the general public.

It is a good holiday destination, but there was no specific element that could distinguish it from the others in its category.
Now, Tenerife is going to be a place full of emotions. An island to visit to experience amazing things that you will always remember.

We are going to capitalise on the field of emotions, because it is here, and nowhere else in

the world, where they live. And this is where you should come to look for them.

05. STRATEGIC APPROACH

Strategic approach: Focus on priority segments, countries and products

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5.1 SWOT Analysis

	COMMUNICATION	ENVIRONMENT	BUSINESS
W	• Functional communication based on places, leaving aside people and the most emotional unique attributes of the destination. • Examples of the wide variety on offer, but without focusing on anything in particular and without segmentation, so valuable impacts are lost.	• Outdated perception of the destination from younger generations, especially nationally. • High dependence on certain countries that feed the perception of the destination.	• High dependence on tour operators. • Low spending at destination due to the high dependence on tour operators who centralise their packages, affecting this spending problem.
T	• The Sun as an attraction. It is the main communication tool for all Sun and Beach destinations around the world. • The use of the press, the media and social networks in an innovative way by other destinations.	• Brexit, the collapse of Thomas Cook and the growing economic crisis that will affect priority countries (ES/DE/UK). • Recovery of North Africa as a holiday destination at a more affordable price.	• Stagnation in the same type of tourists, who are getting older. • Low connectivity with some destinations compared to the competition. • Sun and beach. Other destinations claim the same attraction and are known worldwide for it.
S	• An audience faithful to the destination, participatory and willing to collaborate with the brand. • A wide variety of communication resources already implemented with which to work to attract new segments.	• A young and active local population ready to be part of the project. • An environment with sea and mountains that can be exploited for a wide variety of activities. • Stable climate throughout the year which means a constant flow of tourists including in winter.	• Great cultural, social and culinary offering of high quality. • High occupancy even in winter thanks to weather conditions. • Tourists loyal to the destination that come back year after year.
O	• Technological advances now allow us to create a more digital experience. Improve usability and customisation. • We must create a more powerful and versatile website and mobile environment.	• Find new Tenerife brand ambassadors locally. • Exploitation of the environment for more trendy activities such as sports or relaxation outdoors.	• Approach new segments to replace the losses caused by economic and social problems. • A new brand image that opens the destination to countries that provide tourism to the island in the long term.

5.2 Definition of priority countries

SELECTION STRATEGY FOR PRIORITY COUNTRIES

REACTIVATION OF MATURE MARKETS

Reposition Tenerife as a destination in the minds of consumers in the more mature markets with the aim of attracting more tourists and seeking a higher income based on an increase in overnight stays and the greater number of activities carried out at the destination.

SOURCE MARKET DIVERSIFICATION

The search for new customers in emerging or non-traditional markets, resulting in the improvement of the other objectives:

The increase in arrivals, overnight stays and spending may be associated with different motivations than in the mature markets.

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5.2 Definition of priority countries

GROUP 1

Large mature European sources Spain, UK and Germany

Mainland Spain is the base source market, with high connectivity and tourists that go to the Island of Tenerife all year round. The United Kingdom and Germany are major worldwide tourist sources and the main sources for the Island of Tenerife as well as Spain, with high connectivity to our Island. They are mature markets with very stable growth. In these markets, our island captures a tourist profile with an average spending capacity.

GROUP 2

Large European sources to develop France and Italy

Large world tourist sources and the main sources for Spain, with high connectivity to Spain. They are mature markets with very stable growth.

In these markets, the island of Tenerife presents growth possibilities since they are markets where our catchment quota still has a lot of development capacity.

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5.2 Definition of priority countries

GROUP 3

Medium-sized European sources: Nordic countries (Denmark, Norway, Sweden and Finland), Netherlands, Belgium, Austria, Switzerland, Ireland and Portugal.

They are medium-sized markets as world tourist sources, but with great importance in volume for the Island of Tenerife. They show behaviour typical of markets with great potential in the growth phase. When they show more dynamism it coincides with that of their national economies. These are tourists with average purchasing power in Spain, with tourists from the Nordic countries standing out for their higher than average spending per person.

GROUP 4

Eastern Europe, Russia, Poland, Ukraine and the Czech Republic

Russia is a market with great potential. The customer is of a very high standard.
In recent years the ruble has been evalued and all "civil servantsand military" have been banned from going abroad. Very good air connections. Perception of exotic destination.
The rest are middle-sized markets as world tourism sources but whose interest for the island of Tenerife is focused on their geographical proximity and the growth of their emerging economies.

5.2 Definition of priority countries

GROUP 5

Distant affluent markets sensitive to Spain United States, Japan, Israel, Canada

They are distant markets with potential, in some there are historical and cultural links. Dependent on the dynamism of their National economies.
Tourists in these markets demonstrate great spending capacity, ranking among the top markets in terms of average spending and tax-free shopping.

GROUP 6

Distant prosperous markets Not sensitive to Spain China, India, South Korea, Gulf countries and Southeast Asian countries, West Africa

Great world tourist sources, with exceptional dynamism. However, the geographical distance, the lack of air connectivity and the barriers to travel (visa processing) mean that their global tourist importance is poorly reflected in Spain. They have great spending capacity, ranking among the main markets in
terms of average spending per person and tax-free purchases.

Strategic recommendation of priorities by country

	STRATEGY 1	STRATEGY 2	STRATEGY 3
STRATEGY	ACTION	CAPTURE	PLANTING
COUNTRIES	Markets in a **mature situation** GROUP 1	Markets with **great growth potential** GROUPS 2, 3 & 4	**Emerging** markets GROUPS 5 & 6
OBJECTIVE	Focus on rapid market activation and increase spending at destination	Focus on diversification of source countries and attracting new types of travellers	Focus on generating interest preparing the ground for the future
IMPLICATION	• Increase in investment • ACTIVATION strategy: functional and emotional communication	• Increase in investment • CONQUEST strategy: emotional and functional communication	• Reduced investment • ATTRACTION strategy: emotional communication

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5.3 Definition of strategies and plan of action: Selection of priority segments by country

			SEGMENTS						STRATEGY
			Explorers	Family	Relaxed	Adventurers	Thrill seekers	Stylish	
STRATEGY 1 ACTION	GROUP 1	United Kingdom	31% (yoy:107)	7% (yoy:37)	28% (yoy:142)	13% (yoy:118)	9% (yoy:80)	12% (yoy:156)	In order to meet the short-term objective for activating travellers, we will focus our efforts on those segments with the highest volume (EXPLORERS, RELAXED AND FAMILY).
		Spain	28% (yoy:103)	24% (yoy:111)	11% (yoy:60)	17% (yoy:134)	13% (yoy:104)	7% (yoy:91)	
		Germany	27% (yoy:99)	20% (yoy:93)	20% (yoy:109)	16% (yoy:126)	13% (yoy:104)	4% (yoy:52)	
STRATEGY 2 RECRUITMENT	GROUP 2	France	40% (yoy:147)	20% (yoy:93)	15% (yoy:82)	10% (yoy:79)	10% (yoy:80)	5% (yoy:65)	In the second strategy, we will approach those segments with a greater affinity for the destination, although they are in lower volumes, to meet the objective of attracting new types of traveller to the destination. In other words, we will focus our efforts on the segments: ADVENTURERS. THRILL SEEKERS AND STYLISH.
		Italy	28% (yoy:103)	22% (yoy:102)	14% (yoy:77)	11% (yoy:87)	18% (yoy:144)	7% (yoy:91)	
	GROUP 3	Denmark	19% (yoy:70)	24% (yoy:111)	19% (yoy:104)	14% (yoy:110)	16% (yoy:128)	8% (yoy:104)	
		Norway	24% (yoy:88)	22% (yoy:102)	16% (yoy:88)	15% (yoy:118)	12% (yoy:96)	11% (yoy:143)	
		Sweden	21% (yoy:77)	25% (yoy:116)	19% (yoy:104)	11% (yoy:87)	14% (yoy:112)	10% (yoy:130)	
		Finland	21% (yoy:77)	21% (yoy:97)	22% (yoy:120)	19% (yoy:149)	11% (yoy:88)	6% (yoy:78)	
		Ireland	29% (yoy:107)	8% (yoy:37)	26% (yoy:142)	15% (yoy:118)	13% (yoy:80)	12% (yoy:156)	
		Netherlands	28% (yoy:109)	19% (yoy:88)	22% (yoy:120)	14% (yoy:110)	19% (yoy:104)	4% (yoy:52)	
		Austria and Switzerland	27% (yoy:99)	20% (yoy:93)	20% (yoy:109)	16% (yoy:126)	13% (yoy:104)	4% (yoy:52)	
		Belgium	29% (yoy:107)	21% (yoy:97)	19% (yoy:104)	8% (yoy:63)	16% (yoy:128)	7% (yoy:91)	
		Portugal	28% (yoy:102)	24% (yoy:111)	11% (yoy: 60)	14% (yoy:110)	17% (yoy:136)	6% (yoy:77)	
	GROUP 4	Russia	28% (yoy:109)	26% (yoy:116)	19% (yoy:116)	6% (yoy:53)	7% (yoy:56)	16% (yoy:138)	
		Poland	22% (yoy:98)	26% (yoy:126)	20% (yoy:118)	7% (yoy:55)	7% (yoy:55)	9% (yoy:109)	
		OT/EUE	30% (yoy:109)	26% (yoy:120)	20% (yoy:109)	7% (yoy:55)	5% (yoy:40)	12% (yoy:155)	
STRATEGY 3 PLANTING	GROUP 5	Japan	38% (yoy:115)	25% (yoy:117)	12% (yoy:98)	6% (yoy:66)	15% (yoy:92)	4% (yoy:46)	In the third strategy we will focus on those with the best ratio of affinity to volume to awaken their interest towards the destination for the future.
		USA	26% (yoy:78)	24% (yoy:112)	16% (yoy:131)	11% (yoy:122)	16% (yoy:98)	7% (yoy:81)	
		Canada	28% (yoy:84)	24% (yoy:112)	14% (yoy:115)	17% (yoy:188)	10% (yoy:61)	7% (yoy:81)	
		Israel	30% (yoy:100)	18% (yoy:112)	14% (yoy:115)	6% (yoy:66)	18% (yoy:110)	16% (yoy:184)	
	GROUP 6	China	27% (yoy:81)	25% (yoy:117)	12% (yoy:98)	6% (yoy:66)	18% (yoy:110)	12% (yoy:139)	
		India	35% (yoy:106)	16% (yoy:75)	11% (yoy:90)	8% (yoy:88)	15% (yoy:92)	15% (yoy:173)	
		South Korea	40% (yoy:121)	22% (yoy:103)	10% (yoy:82)	6% (yoy:66)	18% (yoy:110)	4% (yoy:46)	

VOLUME   AFFINITY

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5.4 Definition of strategies and plan of action:

Proposal for a new message architecture

In order to diversify the communication of Tenerife to show the variety on offer, we propose a new message architecture that distributes the weights to be dedicated to each of the activities in the communication messages for each strategy and country based on the priority segments.

			STRATEGY			
STRATEGY 1 ACTION	GROUP 1	United Kingdom	Explorers	Adventurers	Relaxed	
		Spain	Explorers	Family	Adventurers	
		Germany	Explorers	Family	Relaxed	Adventurers
STRATEGY 2 RECRUITMENT	GROUP 2	France	Explorers	Family		
		Italy	Thrill seekers	Explorers		
	GROUP 3	Denmark	Thrill seekers	Family	Adventurers	
		Norway	Stylish	Adventurers	Family	
		Sweden	Stylish	Family	Thrill seekers	Relaxed
		Finland	Adventurers	Relaxed		
		Ireland	Stylish	Relaxed	Adventurers	Explorer
		Netherlands	Relaxed	Adventurers	Explorer	Thrill seekers
		Austria and Switzerland	Adventurers	Relaxed	Thrill seekers	
		Belgium	Thrill seekers	Explorers	Relaxed	
		Portugal	Thrill seekers	Family	Adventurers	
	GROUP 4	Russia	Relaxed	Family	Stylish	Explorer
		Poland	Relaxed	Family	Stylish	
		OT/EUE	Stylish	Family	Relaxed	
STRATEGY 3 PLANTING	GROUP 5	Japan	Explorers			
		USA	Adventurers			
		Canada	Adventurers			
		Israel	Stylish			
	GROUP 6	China	Stylish			
		India	Explorers			
		South Korea	Explorers			

06. PREPARATION OF PROPOSALS

6.2 Proposal for channels and actions

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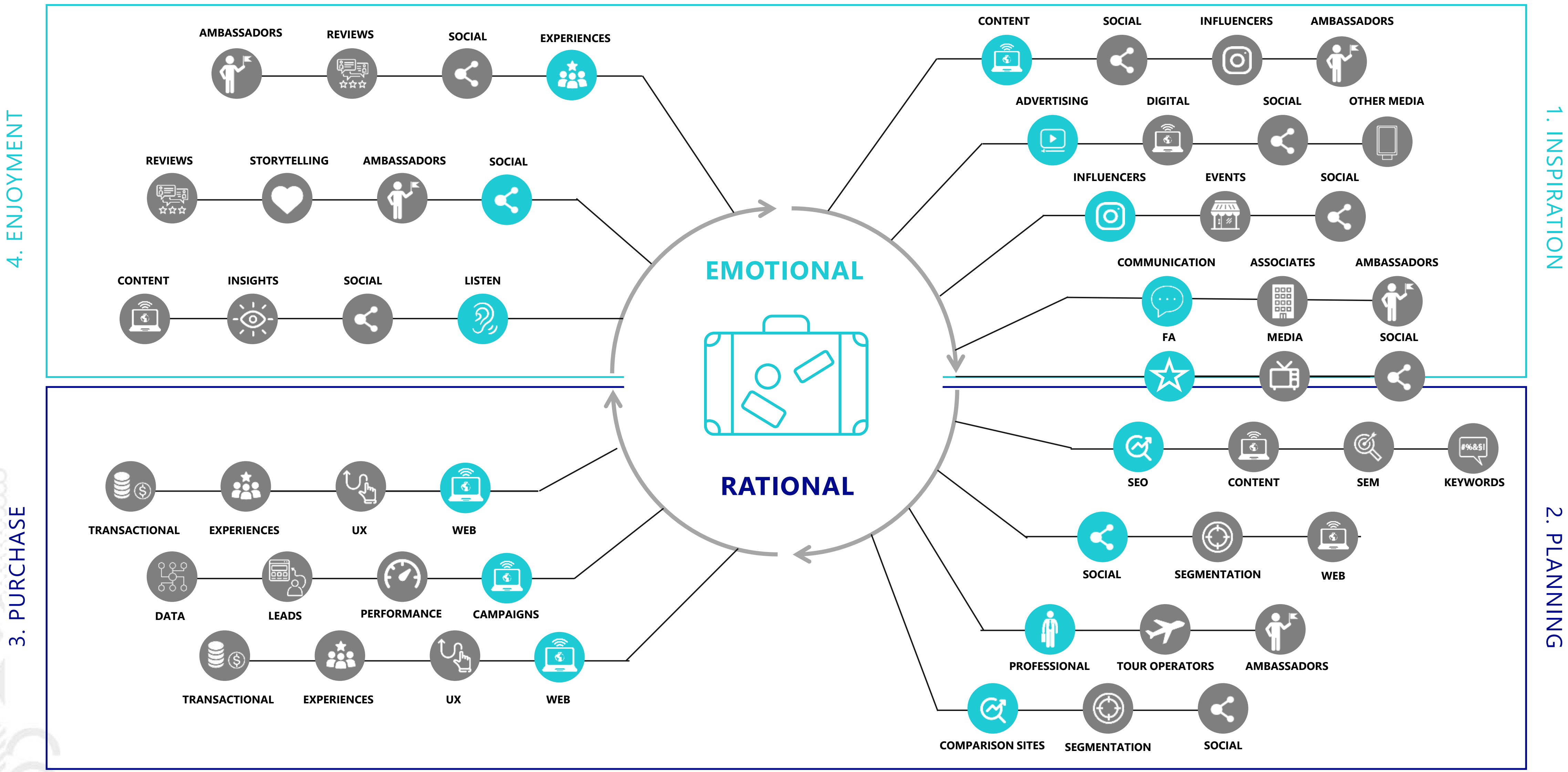
6.2 Proposal for channels and actions



Thank you for your time!