

TOURIST PROFILE BY QUARTER OF TRIP (2018)

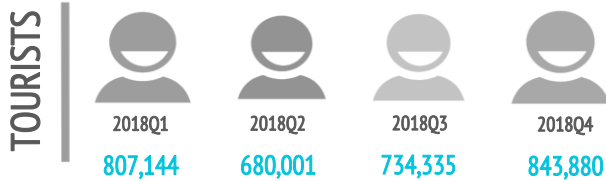
GERMANY

How many are they and how much do they spend?

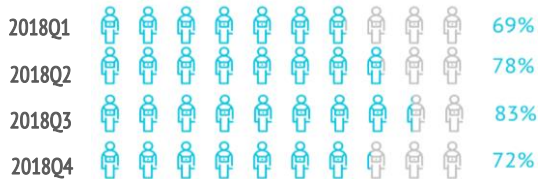


	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.81	0.68	0.73	0.84	3.07
Tourist arrivals > 15 years old (EGT) (*)	0.74	0.62	0.62	0.77	2.75
- book holiday package (*)	0.51	0.48	0.51	0.55	2.06
- do not book holiday package (*)	0.23	0.14	0.11	0.21	0.69
- % tourists who book holiday package	69.3%	77.5%	82.7%	72.3%	75.0%

(*) Million of tourists

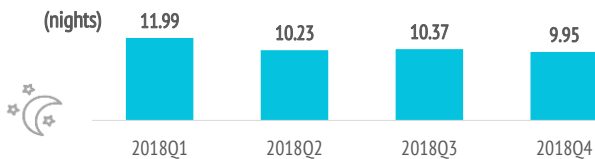


% TOURISTS WHO BOOK HOLIDAY PACKAGE

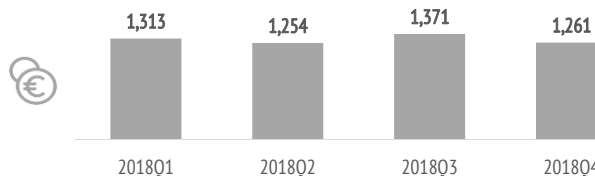


	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	1,313	1,254	1,371	1,261	1,298
- book holiday package	1,361	1,304	1,413	1,348	1,357
- holiday package	1,116	1,107	1,196	1,154	1,144
- others	245	197	217	195	213
- do not book holiday package	1,206	1,085	1,173	1,032	1,122
- flight	286	322	331	295	303
- accommodation	447	392	372	363	398
- others	473	371	470	373	421
Average length of stay	11.99	10.23	10.37	9.95	10.66
- book holiday package	9.98	9.71	10.02	9.34	9.76
- do not book holiday package	16.52	11.99	12.06	11.56	13.37
Average daily expenditure (€)	130.5	134.7	139.9	140.8	136.5
- book holiday package	145.6	142.5	146.2	153.9	147.3
- do not book holiday package	96.6	107.8	110.3	106.3	104.0
Total turnover (> 15 years old) (€m)	970	777	854	965	3,565
- book holiday package	696	626	727	746	2,795
- do not book holiday package	273	151	127	218	769

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	83.2%	74.6%	70.2%	83.2%	78.3%
Sea	54.5%	58.7%	66.3%	61.6%	60.1%
Safety	53.1%	53.7%	60.3%	56.5%	55.8%
Tranquility	46.8%	50.6%	53.0%	52.6%	50.7%
Beaches	41.0%	47.2%	55.1%	47.8%	47.5%
Effortless trip	41.1%	42.8%	46.5%	42.9%	43.2%
European belonging	41.5%	40.0%	37.7%	42.5%	40.6%
Accommodation supply	35.8%	40.6%	45.1%	39.1%	39.9%
Landscapes	38.4%	34.3%	31.0%	38.0%	35.7%
Price	25.2%	29.8%	33.9%	23.7%	27.8%
Environment	22.0%	23.8%	22.2%	26.3%	23.6%
Gastronomy	20.6%	21.5%	23.5%	22.0%	21.8%
Authenticity	16.0%	19.6%	18.3%	18.2%	17.9%
Fun possibilities	11.6%	14.7%	20.6%	14.7%	15.2%
Hiking trail network	14.4%	8.8%	6.3%	12.3%	10.7%
Shopping	7.9%	8.1%	10.2%	8.3%	8.6%
Exoticism	4.6%	7.7%	9.2%	7.1%	7.0%
Culture	5.9%	4.9%	7.2%	8.3%	6.6%
Historical heritage	6.4%	5.1%	6.7%	7.3%	6.4%
Nightlife	4.0%	3.3%	4.8%	4.3%	4.1%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important") of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE SEA



What is the main motivation for their holidays?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	50.2%	45.5%	48.1%	52.0%	49.2%
Enjoy family time	5.8%	8.8%	11.5%	7.5%	8.2%
Have fun	4.3%	7.2%	10.4%	5.6%	6.7%
Explore the destination	31.7%	32.3%	27.0%	29.2%	30.1%
Practice their hobbies	3.2%	3.7%	2.0%	3.1%	3.0%
Other reasons	4.9%	2.4%	1.0%	2.7%	2.8%

How far in advance do they book their trip?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.6%	0.6%	0.6%	0.5%	0.6%
Between 1 and 30 days	23.1%	18.9%	23.7%	24.9%	22.8%
Between 1 and 2 months	23.2%	19.9%	16.6%	25.5%	21.6%
Between 3 and 6 months	37.0%	41.2%	31.6%	29.3%	34.6%
More than 6 months	16.0%	19.4%	27.5%	19.7%	20.4%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

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 QUARTER OF TRIP (2018)

GERMANY

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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	58.2%	46.7%	38.8%	53.8%	50.0%
Friends or relatives	20.8%	23.0%	28.1%	24.7%	24.0%
Internet or social media	50.9%	55.3%	56.5%	53.3%	53.8%
Mass Media	2.8%	2.3%	2.7%	2.3%	2.5%
Travel guides and magazines	16.4%	16.4%	14.2%	14.6%	15.4%
Travel Blogs or Forums	3.8%	4.1%	6.2%	5.2%	4.8%
Travel TV Channels	1.5%	1.8%	1.4%	1.4%	1.5%
Tour Operator or Travel Agency	30.9%	35.6%	40.3%	31.4%	34.2%
Public administrations or similar	0.1%	0.1%	0.2%	0.3%	0.2%
Others	1.4%	1.3%	1.5%	2.1%	1.6%

* Multi-choice question

With whom did they book their flight and accommodation?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Flight					
- Directly with the airline	27.5%	21.8%	16.5%	24.5%	22.9%
- Tour Operator or Travel Agency	72.5%	78.2%	83.5%	75.5%	77.1%
Accommodation					
- Directly with the accommodation	18.5%	15.0%	10.2%	17.2%	15.5%
- Tour Operator or Travel Agency	81.5%	85.0%	89.8%	82.8%	84.5%

Where do they stay?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	14.8%	14.9%	15.9%	13.4%	14.7%
4* Hotel	44.3%	51.0%	51.3%	46.9%	48.1%
5* Hotel / 5* Luxury Hotel	4.7%	5.2%	4.2%	5.9%	5.1%
Aparthotel / Tourist Villa	16.6%	15.8%	17.3%	15.5%	16.3%
House/room rented in a private dwelling	6.2%	4.3%	3.7%	5.6%	5.0%
Private accommodation ⁽¹⁾	5.8%	3.3%	3.6%	5.8%	4.7%
Others (Cottage, cruise, camping,...)	7.6%	5.5%	4.1%	6.9%	6.2%

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

What do they book?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	20.8%	13.8%	12.3%	18.9%	16.7%
Bed and Breakfast	9.1%	9.0%	6.2%	8.3%	8.2%
Half board	34.5%	34.1%	36.0%	32.3%	34.2%
Full board	2.6%	2.1%	1.8%	2.3%	2.2%
All inclusive	32.9%	41.0%	43.7%	38.3%	38.8%



38.8% of Germans book all inclusive.



32.9%
2018Q1



43.7%
2018Q3



41.0%
2018Q2



38.3%
2018Q4

Other expenses

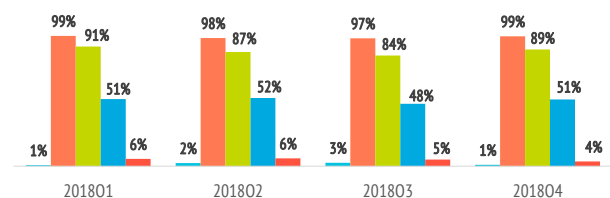
	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	62.0%	54.3%	50.8%	55.1%	55.8%
Supermarkets	58.1%	51.9%	55.6%	53.8%	55.0%
Car rental	35.5%	32.4%	31.0%	32.1%	32.9%
Organized excursions	22.4%	25.9%	33.3%	23.7%	26.0%
Taxi, transfer, chauffeur service	51.6%	60.4%	65.6%	53.7%	57.4%
Theme Parks	6.4%	7.3%	11.4%	5.9%	7.6%
Sport activities	6.0%	7.6%	8.9%	6.9%	7.3%
Museums	7.0%	6.4%	5.4%	5.8%	6.2%
Flights between islands	3.0%	3.4%	3.3%	3.4%	3.3%

Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	0.8%	2.4%	2.6%	1.1%	1.7%
1 - 2 hours	8.1%	10.7%	13.1%	10.0%	10.4%
3 - 6 hours	40.1%	35.0%	36.7%	38.1%	37.6%
7 - 12 hours	45.5%	46.0%	42.5%	47.2%	45.4%
More than 12 hours	5.5%	5.9%	5.1%	3.6%	5.0%

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	2018Q1	2018Q2	2018Q3	2018Q4	2018
Beach	70.8%	82.6%	88.6%	79.0%	79.8%
Walk, wander	61.8%	53.1%	47.0%	56.1%	54.9%
Explore the island on their own	53.3%	53.0%	51.2%	51.2%	52.2%
Swimming pool, hotel facilities	32.7%	45.6%	52.9%	39.3%	42.0%
Taste Canarian gastronomy	33.5%	30.1%	29.8%	29.8%	30.8%
Organized excursions	16.0%	19.7%	27.3%	18.2%	20.0%
Sport activities	18.9%	18.9%	18.5%	16.6%	18.2%
Activities at sea	13.2%	14.7%	16.3%	15.9%	15.0%
Theme parks	10.1%	15.2%	21.9%	11.4%	14.3%
Nature activities	16.5%	13.7%	11.3%	14.8%	14.2%
Wineries/markets/popular festivals	13.1%	12.3%	13.3%	11.0%	12.4%
Sea excursions / whale watching	8.0%	11.7%	19.3%	10.2%	12.0%
Museums / exhibitions	12.4%	10.2%	10.7%	10.6%	11.0%
Nightlife / concerts / shows	7.9%	8.8%	12.0%	9.2%	9.4%
Astronomical observation	3.8%	4.6%	6.5%	3.9%	4.6%
Beauty and health treatments	4.2%	5.2%	4.4%	4.8%	4.6%

* Multi-choice question



TOURIST PROFILE BY QUARTER OF TRIP (2018)

GERMANY



Which island do they choose?

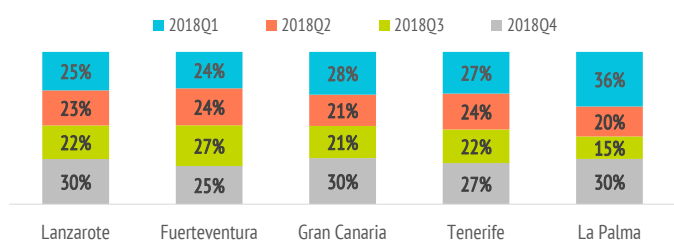
Tourists (> 15 years old)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	73,652	67,322	64,655	86,544	292,173
Fuerteventura	180,801	183,326	201,970	189,240	755,337
Gran Canaria	241,602	177,495	182,390	260,618	862,105
Tenerife	186,331	160,632	150,183	184,029	681,175
La Palma	35,790	19,707	14,723	29,726	99,946

Share by islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Lanzarote	10.3%	11.1%	10.5%	11.5%	10.9%
Fuerteventura	25.2%	30.1%	32.9%	25.2%	28.1%
Gran Canaria	33.6%	29.2%	29.7%	34.7%	32.0%
Tenerife	25.9%	26.4%	24.5%	24.5%	25.3%
La Palma	5.0%	3.2%	2.4%	4.0%	3.7%

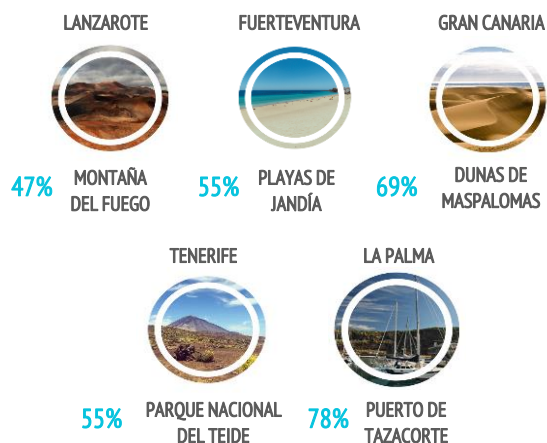
How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	89.2%	92.0%	91.2%	91.6%	91.0%
Two islands	6.7%	6.7%	7.7%	5.7%	6.6%
Three or more islands	4.1%	1.3%	1.1%	2.8%	2.4%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



MOST VISITED PLACES IN EACH ISLAND



Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	15.9%	18.6%	19.3%	17.0%	17.6%
- Flights	12.0%	14.8%	15.3%	12.9%	13.7%
- Accommodation	21.0%	22.7%	24.5%	21.5%	22.4%
- Transport	15.0%	17.5%	16.8%	15.4%	16.1%
- Restaurants	23.5%	24.0%	22.5%	22.2%	23.0%
- Excursions	27.2%	34.0%	32.7%	28.5%	30.4%
- Activities	29.6%	36.2%	36.0%	32.1%	33.4%
Book or purchase					
- Tourist package	38.3%	38.6%	41.3%	39.4%	39.4%
- Flights	50.4%	43.1%	37.8%	47.4%	45.0%
- Accommodation	39.2%	34.3%	29.7%	36.1%	35.0%
- Transport	31.4%	28.9%	23.7%	30.2%	28.6%
- Restaurants	4.5%	4.6%	5.2%	6.1%	5.1%
- Excursions	9.1%	10.1%	11.3%	10.0%	10.1%
- Activities	9.0%	8.8%	11.2%	8.7%	9.4%

* Multi-choice question

Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	11.2%	10.4%	6.3%	9.9%	9.6%
Used the Internet	88.8%	89.6%	93.7%	90.1%	90.4%
- Own Internet connection	30.8%	32.7%	36.2%	34.8%	33.6%
- Free Wifi connection	45.9%	45.2%	45.4%	42.3%	44.6%
Applications*					
- Search for locations or maps	58.6%	59.7%	64.2%	63.3%	61.5%
- Search for destination info	45.1%	46.0%	49.3%	49.0%	47.4%
- Share pictures or trip videos	47.0%	56.5%	60.2%	53.5%	54.0%
- Download tourist apps	5.6%	6.5%	6.5%	7.4%	6.5%
- Others	27.7%	22.0%	20.7%	23.2%	23.6%

* Multi-choice question

The data refers to % of tourists on each island who have visited the place.

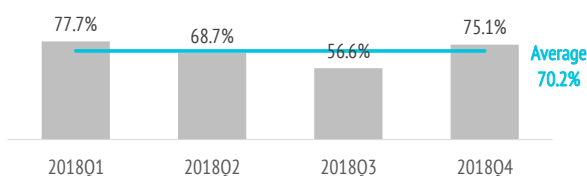
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q2	2018Q3	2018Q4	2018
Average rating	8.40	8.53	8.51	8.53	8.49
Experience in the Canary Islands					
Worse or much worse than expected	1.5%	1.8%	2.1%	1.5%	1.7%
Lived up to expectations	63.2%	56.1%	50.9%	58.3%	57.5%
Better or much better than expected	35.2%	42.1%	47.1%	40.2%	40.8%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.61	8.53	8.27	8.69	8.54
Recommend visiting the Canary Islands	8.82	8.80	8.74	8.92	8.83

How many are loyal to the Canary Islands?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Repeat tourists	77.7%	68.7%	56.6%	75.1%	70.2%
Repeat tourists (last 5 years)	73.4%	64.2%	50.4%	70.4%	65.3%
Repeat tourists (last 5 years)(5 or more visits)	20.7%	16.4%	10.3%	18.5%	16.8%
At least 10 previous visits	20.0%	15.6%	9.9%	17.9%	16.1%

REPEAT TOURISTS



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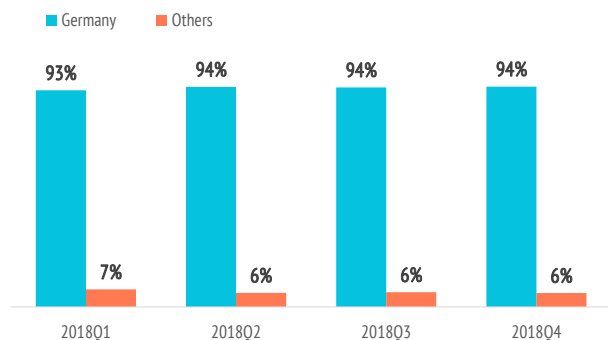
GERMANY

Where does the flight come from?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Germany	92.5%	94.0%	93.7%	94.1%	93.6%
Spanish Mainland	3.5%	2.4%	2.0%	2.7%	2.7%
Switzerland	2.2%	1.4%	2.7%	1.2%	1.9%
Others	1.8%	2.2%	1.5%	2.0%	1.9%

% TOURISTS BY QUARTER OF TRIP



Who do they come with?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	10.5%	9.6%	5.5%	11.1%	9.3%
Only with partner	58.4%	53.1%	46.9%	55.6%	53.8%
Only with children (< 13 years old)	4.1%	5.5%	9.0%	4.3%	5.6%
Partner + children (< 13 years old)	4.9%	6.0%	8.6%	4.0%	5.7%
Other relatives	3.9%	4.5%	5.8%	5.6%	4.9%
Friends	6.3%	6.7%	5.8%	5.7%	6.1%
Work colleagues	0.4%	0.0%	0.1%	0.2%	0.2%
Organized trip	0.3%	0.3%	0.0%	0.3%	0.2%
Other combinations ⁽¹⁾	11.2%	14.3%	18.2%	13.2%	14.0%

(1) Different situations have been isolated

Tourists with children	2018Q1	2018Q2	2018Q3	2018Q4	2018
- Between 0 and 2 years old	1.7%	1.6%	1.1%	1.4%	1.5%
- Between 3 and 12 years old	8.6%	11.6%	18.6%	8.9%	11.6%
- Between 0-2 and 3-12 years	0.5%	1.5%	1.3%	0.7%	1.0%

Tourists without children	2018Q1	2018Q2	2018Q3	2018Q4	2018
	89.1%	85.3%	79.1%	89.0%	86.0%

Group composition:	2018Q1	2018Q2	2018Q3	2018Q4	2018
- 1 person	14.3%	13.7%	7.7%	14.7%	12.8%
- 2 people	65.1%	59.2%	56.4%	63.6%	61.4%
- 3 people	9.5%	11.9%	16.5%	10.2%	11.8%
- 4 or 5 people	9.2%	13.7%	17.6%	10.2%	12.4%
- 6 or more people	1.7%	1.5%	1.8%	1.2%	1.5%

Average group size:	2018Q1	2018Q2	2018Q3	2018Q4	2018
	2.23	2.36	2.56	2.25	2.34



14% of Germans travel with children.



Who are they?



	2018Q1	2018Q2	2018Q3	2018Q4	2018
Gender					
Men	50.7%	50.4%	49.0%	50.8%	50.3%
Women	49.3%	49.6%	51.0%	49.2%	49.7%
Age					
Average age (tourist > 15 years old)	51.0	46.6	39.8	49.3	47.0
Standard deviation	15.5	15.5	14.8	15.6	15.9
Age range (> 15 years old)					
16 - 24 years old	5.3%	6.7%	19.0%	4.8%	8.6%
25 - 30 years old	8.6%	13.5%	15.0%	11.0%	11.8%
31 - 45 years old	20.9%	25.9%	29.3%	23.4%	24.6%
46 - 60 years old	35.0%	33.5%	27.6%	34.8%	32.9%
Over 60 years old	30.2%	20.3%	9.2%	26.0%	22.0%
Occupation					
Salaried worker	47.7%	56.3%	66.5%	59.6%	57.2%
Self-employed	12.2%	6.7%	6.1%	8.7%	8.6%
Unemployed	0.3%	0.3%	0.2%	0.1%	0.2%
Business owner	12.3%	11.7%	10.4%	10.2%	11.1%
Student	4.0%	7.3%	10.4%	2.1%	5.7%
Retired	22.2%	16.1%	5.4%	18.0%	15.9%
Unpaid domestic work	0.6%	0.8%	0.6%	0.5%	0.6%
Others	0.7%	0.9%	0.3%	0.8%	0.7%
Annual household income level					
Less than €25,000	9.7%	12.2%	16.9%	9.6%	11.9%
€25,000 - €49,999	34.1%	36.0%	30.8%	34.6%	33.9%
€50,000 - €74,999	30.0%	28.1%	33.1%	28.6%	29.9%
More than €74,999	26.2%	23.7%	19.2%	27.2%	24.3%
Education level					
No studies	0.4%	0.2%	0.7%	0.2%	0.4%
Primary education	3.8%	4.3%	4.2%	5.1%	4.4%
Secondary education	22.8%	23.5%	24.4%	24.6%	23.8%
Higher education	73.0%	72.0%	70.6%	70.2%	71.4%



AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% SALARIED WORKED TOURISTS



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.