

TOURIST PROFILE BY QUARTER OF TRIP (2019)

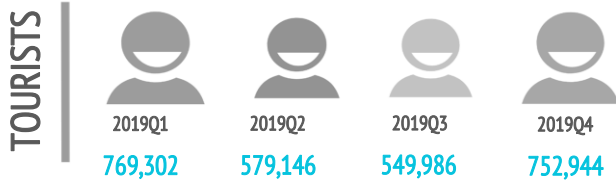
GERMANY

How many are they and how much do they spend?

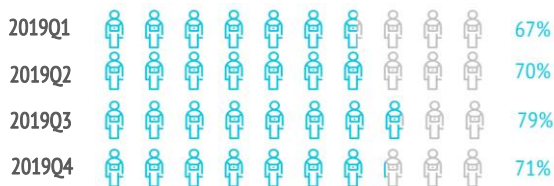


	2019Q1	2019Q2	2019Q3	2019Q4	2019
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.77	0.58	0.55	0.75	2.65
Tourist arrivals > 15 years old (EGT) (*)	0.71	0.51	0.47	0.70	2.39
- book holiday package (*)	0.48	0.36	0.37	0.50	1.71
- do not book holiday package (*)	0.23	0.15	0.10	0.20	0.68
- % tourists who book holiday package	67.4%	70.4%	78.8%	71.3%	71.4%

(*) Million of tourists

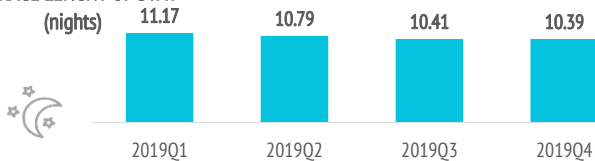


% TOURISTS WHO BOOK HOLIDAY PACKAGE

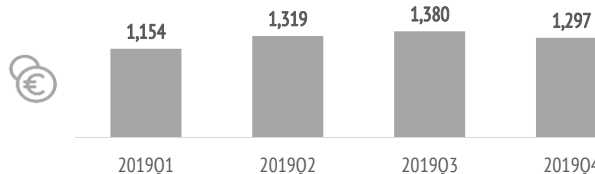


	2019Q1	2019Q2	2019Q3	2019Q4	2019
Expenditure per tourist (€)	1,154	1,319	1,380	1,297	1,276
- book holiday package	1,264	1,294	1,439	1,388	1,345
- holiday package	1,058	1,099	1,246	1,176	1,142
- others	205	195	193	212	203
- do not book holiday package	927	1,378	1,163	1,070	1,104
- flight	241	342	338	332	304
- accommodation	340	338	375	380	356
- others	346	698	449	358	443
Average length of stay	11.17	10.79	10.41	10.39	10.71
- book holiday package	10.52	9.91	9.92	10.01	10.11
- do not book holiday package	12.51	12.88	12.23	11.35	12.20
Average daily expenditure (€)	119.1	137.4	139.9	136.7	132.3
- book holiday package	132.3	139.8	149.4	147.7	142.1
- do not book holiday package	91.8	131.7	104.8	109.3	107.7
Total turnover (> 15 years old) (€m)	816	673	651	914	3,054
- book holiday package	603	465	535	698	2,300
- do not book holiday package	213	208	117	216	755

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Climate	83.3%	75.7%	67.6%	82.7%	78.4%
Sea	56.7%	62.5%	64.4%	62.7%	61.2%
Safety	56.0%	59.0%	57.8%	52.9%	56.1%
Tranquility	51.6%	53.1%	50.9%	50.9%	51.6%
Beaches	41.3%	49.9%	53.3%	49.1%	47.8%
Effortless trip	46.5%	46.6%	44.5%	42.9%	45.0%
European belonging	44.1%	43.4%	39.1%	40.1%	41.8%
Accommodation supply	40.3%	42.3%	42.7%	41.5%	41.6%
Landscapes	43.1%	37.3%	31.7%	37.7%	38.0%
Price	30.6%	27.6%	30.2%	23.4%	27.7%
Environment	31.3%	30.6%	22.5%	24.4%	27.4%
Gastronomy	25.0%	22.8%	21.8%	22.7%	23.2%
Authenticity	19.0%	20.5%	19.2%	16.0%	18.4%
Fun possibilities	14.6%	15.8%	19.6%	14.9%	15.9%
Hiking trail network	16.4%	11.8%	6.8%	12.5%	12.4%
Shopping	8.9%	9.7%	10.9%	8.0%	9.2%
Historical heritage	10.1%	8.4%	8.0%	5.2%	7.9%
Culture	8.7%	7.2%	8.3%	5.5%	7.4%
Exoticism	7.3%	7.7%	8.3%	5.8%	7.2%
Nightlife	4.0%	4.3%	5.0%	4.0%	4.3%

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?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Rest	42.9%	51.6%	52.0%	52.0%	49.3%
Enjoy family time	8.1%	10.0%	10.7%	8.3%	9.1%
Have fun	5.7%	6.7%	9.4%	7.2%	7.1%
Explore the destination	34.8%	25.8%	24.3%	27.1%	28.5%
Practice their hobbies	5.1%	3.6%	1.9%	3.0%	3.5%
Other reasons	3.4%	2.3%	1.6%	2.4%	2.5%

How far in advance do they book their trip?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
The same day	0.7%	0.4%	0.6%	0.6%	0.6%
Between 1 and 30 days	25.9%	16.3%	19.4%	20.7%	21.1%
Between 1 and 2 months	23.5%	19.0%	16.0%	23.2%	21.0%
Between 3 and 6 months	33.5%	42.4%	34.5%	34.6%	35.9%
More than 6 months	16.5%	22.0%	29.5%	20.9%	21.5%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

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 QUARTER OF TRIP (2019)

GERMANY



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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Previous visits to the Canary Islands	54.1%	52.1%	43.0%	56.4%	52.2%
Friends or relatives	21.4%	23.2%	24.3%	22.0%	22.5%
Internet or social media	50.3%	53.2%	55.4%	52.8%	52.7%
Mass Media	2.5%	2.6%	2.0%	2.3%	2.3%
Travel guides and magazines	13.1%	15.8%	12.9%	13.8%	13.9%
Travel Blogs or Forums	4.4%	5.8%	5.8%	4.1%	4.9%
Travel TV Channels	1.6%	1.3%	1.1%	1.5%	1.4%
Tour Operator or Travel Agency	27.4%	31.6%	38.7%	29.7%	31.2%
Public administrations or similar	0.4%	0.1%	0.3%	0.3%	0.3%
Others	2.8%	1.9%	1.9%	2.0%	2.2%

* Multi-choice question

With whom did they book their flight and accommodation? 👁

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Flight					
- Directly with the airline	34.0%	25.7%	19.1%	27.1%	27.3%
- Tour Operator or Travel Agency	66.0%	74.3%	80.9%	72.9%	72.7%
Accommodation					
- Directly with the accommodation	24.0%	15.3%	11.5%	19.9%	18.5%
- Tour Operator or Travel Agency	76.0%	84.7%	88.5%	80.1%	81.5%

Where do they stay? 🏠

	2019Q1	2019Q2	2019Q3	2019Q4	2019
1-2-3* Hotel	12.1%	15.7%	16.7%	11.9%	13.7%
4* Hotel	43.9%	45.6%	49.8%	46.4%	46.1%
5* Hotel / 5* Luxury Hotel	6.2%	8.7%	7.6%	8.7%	7.7%
Aparthotel / Tourist Villa	15.7%	13.4%	13.8%	15.9%	14.9%
House/room rented in a private dwelling	6.8%	5.2%	3.7%	6.4%	5.7%
Private accommodation ⁽¹⁾	6.5%	5.9%	5.2%	5.3%	5.8%
Others (Cottage, cruise, camping,...)	8.7%	5.6%	3.2%	5.4%	6.0%

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

What do they book? 🍽

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Room only	21.9%	14.5%	11.4%	17.3%	16.9%
Bed and Breakfast	8.7%	7.7%	5.4%	8.2%	7.7%
Half board	29.3%	33.6%	30.8%	32.3%	31.4%
Full board	4.5%	4.1%	3.5%	3.3%	3.9%
All inclusive	35.5%	40.0%	48.8%	39.0%	40.2%

“
40.2% of Germans book all inclusive.



35.5%
2019Q1



48.8%
2019Q3



40.0%
2019Q2



39.0%
2019Q4

Other expenses 📍

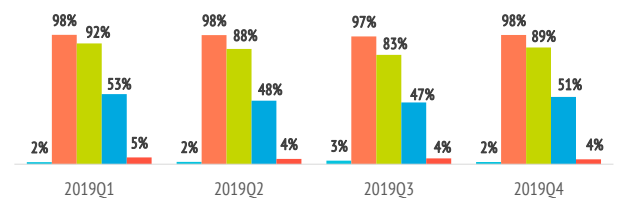
	2019Q1	2019Q2	2019Q3	2019Q4	TOTAL
Restaurants or cafes	56.0%	48.5%	42.5%	50.2%	50.0%
Supermarkets	52.7%	51.9%	48.8%	47.1%	50.1%
Car rental	35.1%	33.5%	28.8%	31.8%	32.6%
Organized excursions	20.8%	25.3%	30.6%	24.0%	24.6%
Taxi, transfer, chauffeur service	51.5%	57.1%	64.1%	54.5%	56.1%
Theme Parks	5.6%	7.5%	5.8%	5.2%	5.9%
Sport activities	6.3%	6.7%	7.6%	6.0%	6.5%
Museums	5.3%	5.6%	5.3%	5.8%	5.5%
Flights between islands	3.3%	3.3%	3.3%	3.0%	3.2%

Activities in the Canary Islands 🚶

Outdoor time per day	2019Q1	2019Q2	2019Q3	2019Q4	2019
0 hours	1.5%	1.7%	2.7%	1.6%	1.8%
1 - 2 hours	6.5%	10.5%	14.1%	9.5%	9.7%
3 - 6 hours	38.6%	39.4%	36.2%	37.6%	38.0%
7 - 12 hours	48.3%	44.3%	42.5%	47.5%	46.1%
More than 12 hours	5.1%	4.0%	4.5%	3.7%	4.4%

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	2019Q1	2019Q2	2019Q3	2019Q4	2019
Beach	68.6%	77.8%	87.2%	80.3%	77.6%
Walk, wander	60.0%	49.9%	44.3%	54.4%	53.1%
Explore the island on their own	54.4%	50.2%	49.0%	51.2%	51.5%
Swimming pool, hotel facilities	32.8%	44.2%	51.0%	38.1%	40.4%
Taste Canarian gastronomy	30.2%	28.1%	28.7%	28.2%	28.9%
Organized excursions	14.7%	20.1%	26.9%	18.8%	19.5%
Sport activities	17.9%	19.2%	17.4%	16.3%	17.6%
Activities at sea	13.4%	15.8%	19.3%	15.5%	15.7%
Nature activities	16.5%	13.7%	13.6%	14.8%	14.8%
Theme parks	10.6%	14.3%	17.5%	10.3%	12.7%
Wineries / markets / popular festiva	12.2%	12.4%	13.1%	11.9%	12.3%
Sea excursions / whale watching	7.2%	12.5%	21.4%	10.5%	12.1%
Museums / exhibitions	10.8%	9.4%	10.8%	11.6%	10.8%
Nightlife / concerts / shows	7.8%	9.3%	10.0%	9.4%	9.0%
Astronomical observation	5.2%	5.4%	7.2%	4.2%	5.3%
Beauty and health treatments	4.0%	4.7%	4.9%	4.0%	4.3%

* Multi-choice question



TOURIST PROFILE BY QUARTER OF TRIP (2019)

GERMANY

Which island do they choose?

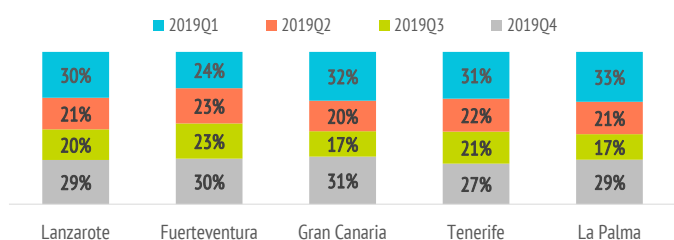
Tourists (> 15 years old)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	82,646	57,088	55,227	79,656	274,617
Fuerteventura	144,612	140,708	140,922	181,482	607,724
Gran Canaria	249,180	156,377	129,692	243,468	778,717
Tenerife	177,546	125,346	121,375	154,275	578,542
La Palma	30,406	19,799	15,612	27,103	92,920

Share by islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	12.1%	11.4%	11.9%	11.6%	11.8%
Fuerteventura	21.1%	28.2%	30.4%	26.5%	26.1%
Gran Canaria	36.4%	31.3%	28.0%	35.5%	33.4%
Tenerife	25.9%	25.1%	26.2%	22.5%	24.8%
La Palma	4.4%	4.0%	3.4%	4.0%	4.0%

How many islands do they visit during their trip?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
One island	89.0%	90.5%	92.4%	91.8%	90.8%
Two islands	5.6%	7.0%	6.5%	5.8%	6.2%
Three or more islands	5.3%	2.5%	1.0%	2.3%	3.0%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



Internet usage during their trip

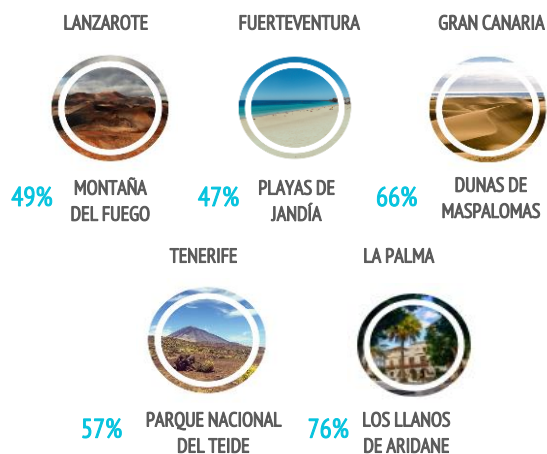
	2019Q1	2019Q2	2019Q3	2019Q4	2019
Research					
- Tourist package	14.7%	15.6%	19.5%	16.5%	16.4%
- Flights	11.7%	13.1%	15.7%	13.6%	13.4%
- Accommodation	17.1%	19.3%	25.2%	20.3%	20.1%
- Transport	14.7%	15.7%	18.0%	15.8%	15.9%
- Restaurants	24.8%	22.9%	19.8%	24.1%	23.1%
- Excursions	30.4%	28.3%	33.0%	29.8%	30.3%
- Activities	31.8%	29.5%	34.9%	32.1%	32.0%
Book or purchase					
- Tourist package	42.9%	42.3%	45.4%	43.4%	43.4%
- Flights	56.5%	49.8%	42.5%	51.7%	50.8%
- Accommodation	44.8%	39.2%	33.4%	39.7%	39.8%
- Transport	36.4%	32.5%	27.7%	35.7%	33.5%
- Restaurants	6.3%	6.7%	7.5%	6.7%	6.8%
- Excursions	9.5%	11.5%	13.0%	12.4%	11.5%
- Activities	10.7%	11.1%	13.0%	10.5%	11.3%

* Multi-choice question

Internet usage in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Did not use the Internet	11.5%	7.7%	4.3%	6.8%	7.9%
Used the Internet	88.5%	92.3%	95.7%	93.2%	92.1%
- Own Internet connection	32.1%	35.1%	32.8%	32.1%	32.9%
- Free Wifi connection	41.9%	43.5%	49.2%	46.2%	44.9%
Applications*					
- Search for locations or maps	61.0%	60.6%	64.4%	62.8%	62.2%
- Search for destination info	47.0%	46.4%	49.7%	47.8%	47.6%
- Share pictures or trip videos	50.9%	56.5%	60.4%	54.2%	55.0%
- Download tourist apps	7.0%	6.8%	8.1%	8.3%	7.6%
- Others	24.9%	25.7%	20.2%	20.8%	22.9%

* Multi-choice question

MOST VISITED PLACES IN EACH ISLAND



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

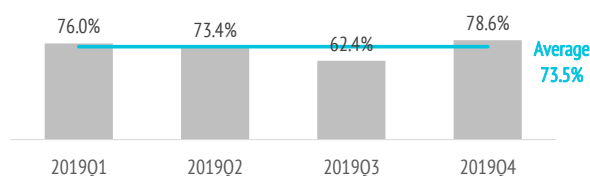
How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Average rating	8.66	8.67	8.58	8.63	8.64
Experience in the Canary Islands					
Worse or much worse than expected	1.4%	1.4%	1.7%	0.9%	1.3%
Lived up to expectations	55.2%	57.3%	52.4%	57.5%	55.8%
Better or much better than expected	43.3%	41.3%	45.8%	41.6%	42.9%
Future intentions (scale 1-10)					
Return to the Canary Islands	8.88	8.67	8.34	8.77	8.70
Recommend visiting the Canary Islands	9.01	8.92	8.81	9.01	8.95

How many are loyal to the Canary Islands?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Repeat tourists	76.0%	73.4%	62.4%	78.6%	73.5%
Repeat tourists (last 5 years)	73.1%	69.3%	55.4%	74.9%	69.4%
Repeat tourists (last 5 years)(5 or more visits)	22.1%	19.9%	10.3%	22.6%	19.4%
At least 10 previous visits	21.2%	21.5%	10.3%	23.5%	19.8%

REPEAT TOURISTS



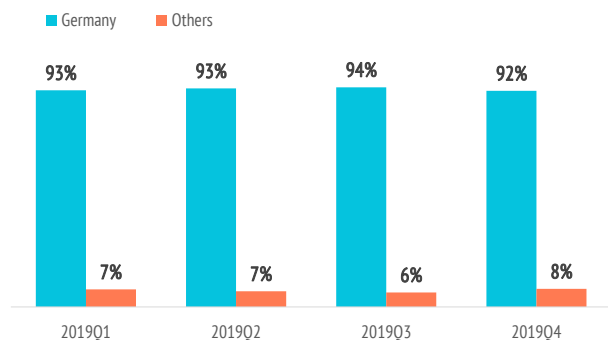
TOURIST PROFILE BY QUARTER OF TRIP (2019) GERMANY

Where does the flight come from?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Germany	92.5%	93.3%	93.8%	92.3%	92.9%
Spanish Mainland	3.0%	2.8%	1.9%	3.0%	2.8%
Switzerlands	1.9%	2.1%	2.6%	2.1%	2.1%
Others	2.6%	1.8%	1.6%	2.6%	2.2%

% TOURISTS BY QUARTER OF TRIP



Who do they come with?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Unaccompanied	11.2%	10.6%	7.9%	11.2%	10.4%
Only with partner	56.3%	51.6%	45.6%	55.5%	53.0%
Only with children (< 13 years old)	3.7%	5.7%	7.9%	4.5%	5.2%
Partner + children (< 13 years old)	4.7%	5.5%	7.9%	4.1%	5.3%
Other relatives	5.0%	6.1%	5.3%	5.9%	5.6%
Friends	6.8%	5.9%	5.6%	5.0%	5.8%
Work colleagues	0.5%	0.6%	0.1%	0.1%	0.3%
Organized trip	0.5%	0.1%	0.1%	0.6%	0.4%
Other combinations ⁽¹⁾	11.2%	14.0%	19.7%	13.2%	14.1%

(1) Different situations have been isolated

Tourists with children	2019Q1	2019Q2	2019Q3	2019Q4	2019
Tourists with children	10.3%	14.4%	19.1%	10.9%	13.1%
- Between 0 and 2 years old	1.9%	1.5%	1.0%	0.8%	1.3%
- Between 3 and 12 years old	7.4%	11.5%	17.5%	9.3%	10.8%
- Between 0 -2 and 3-12 years	1.1%	1.3%	0.6%	0.8%	1.0%

Tourists without children	2019Q1	2019Q2	2019Q3	2019Q4	2019
Tourists without children	89.7%	85.6%	80.9%	89.1%	86.9%

Group composition:	2019Q1	2019Q2	2019Q3	2019Q4	2019
- 1 person	15.2%	13.8%	9.8%	13.5%	13.4%
- 2 people	64.0%	60.5%	54.5%	64.2%	61.4%
- 3 people	9.6%	11.9%	17.6%	10.5%	11.9%
- 4 or 5 people	9.7%	12.1%	16.6%	10.1%	11.7%
- 6 or more people	1.5%	1.7%	1.4%	1.6%	1.6%

Average group size:



13.4% of Germans travel with children.



Who are they?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Gender					
Men	52.6%	50.2%	51.7%	54.6%	52.5%
Women	47.4%	49.8%	48.3%	45.4%	47.5%
Age					
Average age (tourist > 15 years old)	50.9	47.9	41.6	50.4	48.3
Standard deviation	16.0	15.9	14.4	14.8	15.7
Age range (> 15 years old)					
16 - 24 years old	5.5%	7.6%	14.9%	3.7%	7.2%
25 - 30 years old	8.9%	11.4%	14.0%	8.9%	10.5%
31 - 45 years old	22.2%	24.3%	28.7%	22.7%	24.1%
46 - 60 years old	31.9%	32.7%	33.4%	39.3%	34.5%
Over 60 years old	31.5%	24.0%	9.2%	25.4%	23.7%
Occupation					
Salaried worker	45.9%	58.1%	67.6%	59.9%	56.9%
Self-employed	9.5%	11.7%	7.0%	11.7%	10.1%
Unemployed	0.3%	0.6%	0.4%	0.3%	0.4%
Business owner	14.6%	10.2%	11.8%	9.8%	11.7%
Student	3.9%	2.8%	5.9%	1.8%	3.4%
Retired	24.3%	14.4%	6.3%	14.8%	15.8%
Unpaid domestic work	0.5%	0.3%	0.9%	0.5%	0.5%
Others	1.1%	1.9%	0.2%	1.1%	1.1%
Annual household income level					
Less than €25,000	11.7%	9.6%	12.8%	10.4%	11.1%
€25,000 - €49,999	40.5%	38.9%	36.6%	34.8%	37.7%
€50,000 - €74,999	24.4%	27.3%	27.2%	28.0%	26.6%
More than €74,999	23.5%	24.1%	23.3%	26.8%	24.6%
Education level					
No studies	0.7%	0.5%	0.5%	0.5%	0.6%
Primary education	3.8%	4.4%	3.2%	3.9%	3.8%
Secondary education	23.6%	28.4%	27.5%	25.7%	26.0%
Higher education	72.0%	66.7%	68.8%	69.9%	69.6%



AVERAGE AGE (> 15 years old)



% OF TOURISTS WITH INCOMES OVER €74,999



% SALARIED WORKED TOURISTS

