

Tourist profile trend (2016)

Canary Islands: German market



How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	2,201,520	2,177,128	2,336,572	2,340,142	2,727,674
Average daily expenditure (€)	125.50	128.36	127.56	130.44	136.43
- in their place of residence	97.07	100.07	99.50	102.06	107.37
- in the Canary Islands	28.42	28.29	28.06	28.38	29.06
Average length of stay	10.99	10.91	10.82	10.89	10.67
Turnover per tourist (€)	1,243	1,242	1,241	1,271	1,306
Total turnover (> 16 years old) (€m)	2,736	2,703	2,900	2,974	3,561
German turnover: year on year change	--	-1.2%	7.3%	2.6%	19.7%
German tourist arrivals: year on year change	--	-1.1%	7.3%	0.2%	16.6%

Expenditure in the Canary Islands per tourist and trip (€) (**)

	2012	2013	2014	2015	2016
Accommodation (**):	28.61	31.21	32.05	35.62	38.73
- Accommodation	22.58	26.42	26.37	29.38	31.39
- Additional accommodation expenses	6.03	4.79	5.68	6.24	7.33
Transport:	29.07	27.73	26.03	27.66	26.76
- Public transport	4.02	4.02	3.78	3.93	3.95
- Taxi	5.18	4.64	4.36	4.46	4.32
- Car rental	19.86	19.08	17.89	19.27	18.49
Food and drink:	109.14	112.42	114.53	118.41	115.69
- Food purchases at supermarkets	47.54	51.36	51.54	54.63	50.93
- Restaurants	61.60	61.06	62.99	63.78	64.76
Souvenirs:	59.81	61.97	62.43	58.10	59.94
Leisure:	44.64	42.27	39.20	41.92	38.43
- Organized excursions	20.47	21.15	19.03	19.22	19.49
- Leisure, amusement	6.09	5.22	5.00	4.68	4.38
- Trip to other islands	2.15	2.23	2.00	3.47	2.01
- Sporting activities	7.28	7.55	7.52	8.89	7.47
- Cultural activities	2.54	2.06	2.27	2.17	2.09
- Discos and disco-pubs	6.10	4.06	3.37	3.49	3.00
Others:	27.32	19.72	15.63	20.86	16.92
- Wellness	5.49	4.89	4.53	3.55	4.26
- Medical expenses	3.55	2.58	2.06	5.29	2.60
- Other expenses	18.27	12.26	9.04	12.02	10.06

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.3%	0.4%	0.3%	0.4%	0.3%
Between 2 and 7 days	7.5%	6.7%	6.5%	5.6%	4.4%
Between 8 and 15 days	10.2%	9.9%	9.0%	8.0%	6.2%
Between 16 and 30 days	16.1%	16.8%	15.8%	15.5%	13.6%
Between 31 and 90 days	30.5%	31.2%	29.2%	32.4%	32.6%
More than 90 days	35.4%	35.0%	39.2%	38.1%	42.9%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	5.9%	6.2%	5.9%	6.2%	4.9%
Flight and accommodation (room only)	12.3%	12.7%	12.8%	12.8%	13.3%
Flight and accommodation (B&B)	4.6%	4.8%	5.3%	5.2%	4.8%
Flight and accommodation (half board)	33.9%	32.0%	30.8%	30.4%	31.9%
Flight and accommodation (full board)	3.8%	4.6%	4.9%	4.4%	4.5%
Flight and accommodation (all inclusive)	39.5%	39.7%	40.4%	41.0%	40.6%
% Tourists using low-cost airlines	16.0%	18.9%	23.8%	27.1%	29.1%
Other expenses in their place of residence:					
- Car rental	13.5%	14.3%	14.7%	15.2%	14.9%
- Sporting activities	9.6%	10.1%	9.6%	9.9%	9.1%
- Excursions	7.1%	7.5%	8.8%	9.6%	8.8%
- Trip to other islands	2.1%	3.6%	5.1%	5.0%	3.2%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	42.2%	38.2%	40.3%	38.8%	40.0%
- Tour Operator's website	54.1%	63.2%	60.2%	60.9%	60.4%
Accommodation	5.0%	5.5%	5.7%	6.2%	5.3%
- Accommodation's website	79.6%	73.7%	75.9%	74.0%	75.5%
Travel agency (High street)	34.8%	36.9%	35.2%	34.3%	35.2%
Online Travel Agency (OTA)	13.5%	14.8%	14.5%	16.3%	16.3%
No need to book accommodation	4.5%	4.6%	4.3%	4.5%	3.2%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	46.8%	40.1%	41.0%	41.2%	41.4%
- Tour Operator's website	50.9%	57.6%	57.9%	56.1%	55.5%
Airline	8.9%	9.6%	11.4%	11.5%	9.8%
- Airline's website	90.6%	92.6%	91.6%	91.7%	91.8%
Travel agency (High street)	30.7%	35.1%	33.1%	31.8%	32.9%
Online Travel Agency (OTA)	13.5%	15.2%	14.5%	15.5%	15.8%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	5.1%	5.2%	5.0%	4.2%	4.4%
4* Hotel	46.4%	46.2%	46.2%	47.4%	47.9%
1-2-3* Hotel	20.1%	17.8%	18.5%	17.0%	17.9%
Apartment	20.7%	21.8%	21.0%	21.5%	21.9%
Property (privately-owned, friends, family)	3.7%	4.0%	3.6%	3.8%	2.8%
Others	4.0%	5.0%	5.7%	6.2%	5.0%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	50.5%	49.0%	50.3%	49.8%	49.7%
Percentage of women	49.5%	51.0%	49.7%	50.2%	50.3%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	45.1	44.4	45.3	46.0	47.6
Standard deviation	15.0	14.9	14.8	15.3	15.8

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	9.8%	9.4%	8.8%	8.9%	8.3%
25-30 years old	12.1%	14.0%	12.3%	12.6%	11.1%
31-45 years old	27.6%	29.1%	27.6%	25.0%	23.5%
46-60 years old	33.5%	32.0%	34.9%	35.2%	34.1%
Over 60 years old	17.0%	15.6%	16.3%	18.3%	23.0%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	15.1%	14.8%	15.1%	14.0%	13.9%
Upper/Middle management employee	50.5%	52.3%	51.8%	50.0%	48.0%
Auxiliary level employee	11.8%	11.2%	11.6%	12.2%	11.9%
Students	6.1%	6.7%	5.8%	6.5%	5.9%
Retired	14.5%	13.0%	13.6%	15.7%	18.8%
Unemployed / unpaid dom. work	2.0%	2.0%	2.0%	1.7%	1.5%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	15.7%	16.0%	14.5%	14.5%	13.8%
€24,001 - €36,000	20.4%	18.5%	17.6%	17.0%	17.6%
€36,001 - €48,000	18.2%	17.8%	17.8%	18.0%	17.8%
€48,001 - €60,000	15.9%	15.5%	17.3%	16.9%	16.8%
€60,001 - €72,000	8.9%	9.7%	9.5%	9.8%	10.3%
€72,001 - €84,000	6.3%	6.4%	5.8%	6.0%	6.1%
More than €84,000	14.5%	16.0%	17.6%	17.7%	17.6%

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Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	232,655	235,733	251,440	247,710	298,196
- Fuerteventura	648,065	650,940	722,976	694,861	784,700
- Gran Canaria	661,228	638,700	698,575	715,643	846,822
- Tenerife	565,919	564,335	566,517	576,886	670,472
- La Palma	54,846	45,214	50,795	55,310	81,455

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	10.8%	11.0%	11.0%	10.8%	11.1%
- Fuerteventura	30.0%	30.5%	31.6%	30.3%	29.3%
- Gran Canaria	30.6%	29.9%	30.5%	31.2%	31.6%
- Tenerife	26.2%	26.4%	24.7%	25.2%	25.0%
- La Palma	2.5%	2.1%	2.2%	2.4%	3.0%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	9.5%	10.5%	10.4%	9.7%	9.3%
Only with partner	57.5%	53.2%	53.5%	57.1%	55.4%
Only with children (under the age of 13)	1.1%	1.7%	1.4%	1.0%	1.1%
Partner + children (under the age of 13)	8.2%	9.8%	10.3%	8.4%	8.8%
Other relatives	4.8%	5.2%	4.6%	5.7%	5.1%
Friends	5.6%	5.3%	5.2%	5.0%	5.8%
Work colleagues	0.4%	0.4%	0.2%	0.3%	0.1%
Other combinations ⁽¹⁾	12.7%	13.8%	14.3%	12.8%	14.4%

* Multi-choice question (different situations have been isolated)

How do they rate the destination?

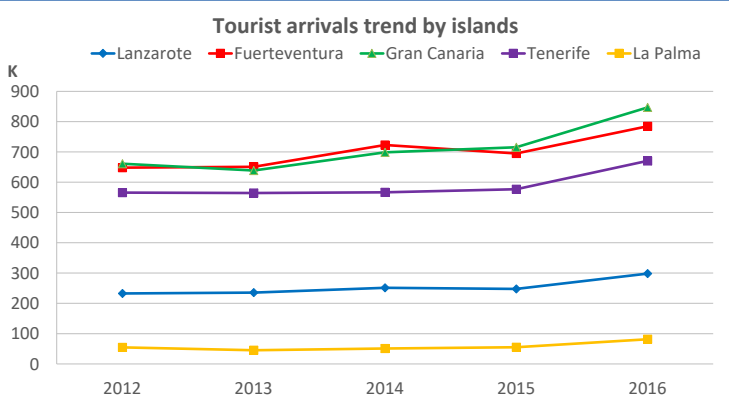
Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	91.7%	92.5%	93.2%	92.0%	93.6%
Average rating (scale 1-10)	8.53	8.62	8.67	8.62	8.71

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	76.9%	76.0%	76.4%	76.7%	77.6%
In love (at least 10 previous visits)	15.7%	16.1%	14.7%	17.7%	16.4%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
Germany	2,088,896	2,067,737	2,184,633	2,195,759	2,551,107
Spanish Mainland	60,024	62,745	87,193	71,547	91,525
Switzerland	23,103	22,163	31,886	39,019	58,452
Belgium	5,173	1,472	2,433	3,262	4,918
Austria	7,206	10,283	5,620	5,117	3,451
United Kingdom	2,061	822	2,362	2,232	3,265
Netherlands	2,144	363	2,380	2,657	1,031
Norway	0	0	1,059	1,248	1,002
Sweden	0	0	1,776	404	705
Italy	870	406	467	561	120



Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

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

Why do they choose the Canary Islands?

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	94.7%	94.3%	93.8%	93.3%	93.6%
Beaches	46.6%	46.0%	46.7%	45.7%	46.3%
Tranquillity/rest/relaxation	49.3%	47.9%	46.1%	44.6%	43.5%
Scenery	29.0%	29.7%	30.2%	31.7%	30.0%
Security	5.3%	5.5%	6.1%	8.9%	15.7%
Visiting new places	13.5%	13.3%	13.4%	13.2%	13.6%
Active tourism	6.3%	6.5%	7.1%	7.7%	6.5%
Ease of travel	6.9%	6.6%	6.2%	5.8%	5.5%
Price	6.3%	5.4%	6.1%	5.3%	5.2%
Suitable destination for children	4.5%	5.1%	5.3%	3.9%	4.2%
Quality of the environment	2.7%	2.8%	3.1%	3.5%	3.4%
Nautical activities	3.1%	3.8%	3.7%	3.2%	3.1%
Culture	1.7%	2.0%	1.9%	2.0%	2.0%
Theme parks	2.5%	2.0%	1.8%	2.0%	1.8%
Rural tourism	1.2%	1.3%	1.4%	1.3%	1.5%
Shopping	1.7%	1.3%	1.5%	1.6%	1.4%

* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	66.6%	64.9%	64.8%	65.5%	66.0%
Recommendation by friends or relatives	31.5%	29.8%	29.8%	28.8%	30.5%
The Canary Islands television channel	0.5%	0.5%	0.4%	0.5%	0.6%
Other television or radio channels	1.1%	1.2%	1.0%	1.2%	1.4%
Information in the press/magazines/books	5.0%	4.5%	4.5%	4.1%	4.2%
Attendance at a tourism fair	0.5%	0.3%	0.4%	0.4%	0.5%
Tour Operator's brochure or catalogue	12.7%	9.9%	10.1%	9.0%	9.5%
Recommendation by Travel Agency	17.9%	18.4%	16.6%	17.2%	17.9%
Information obtained via the Internet	19.8%	21.3%	21.6%	21.5%	22.7%
Senior Tourism programme	0.0%	0.1%	0.1%	0.1%	0.0%
Others	4.9%	5.3%	5.7%	5.6%	5.0%

* Multi-choice question

