

Tourist profile trend (2017)

GERMANY

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR) (mill.)	2.55	2.75	2.75	3.02	3.12
Tourist arrivals (> 16 years old) (mill.)	2.18	2.34	2.34	2.73	2.81
Average daily expenditure (€)	128.36	127.56	130.44	136.43	140.16
. in their place of residence	100.07	99.50	102.06	107.37	110.50
. in the Canary Islands	28.29	28.06	28.38	29.06	29.65
Average lenght of stay	10.91	10.82	10.89	10.67	10.45
Turnover per tourist (€)	1,242	1,241	1,271	1,306	1,324
Total turnover (€m)	3,169	3,418	3,497	3,943	4,135
Tourist arrivals: year on year change	--	7.9%	-0.1%	9.8%	3.4%
Turnover: year on year change	--	7.9%	2.3%	12.8%	4.9%

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	9.5%	9.7%	9.5%	9.9%	9.8%
- Additional accommodation expenses	6.8%	6.4%	6.5%	7.0%	6.0%

Transport:

- Public transport	15.0%	15.9%	15.8%	14.3%	13.1%
- Taxi	16.1%	16.0%	15.1%	14.9%	13.1%
- Car rental	23.2%	23.0%	22.8%	21.8%	22.8%

Food and drink:

- Food purchases at supermarkets	50.8%	49.1%	49.4%	47.6%	47.6%
- Restaurants	47.2%	48.2%	46.8%	46.9%	49.8%

Souvenirs:	61.3%	59.8%	57.5%	56.1%	53.0%
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Leisure:

- Organized excursions	22.5%	21.2%	21.2%	21.5%	19.9%
- Leisure, amusement	9.6%	9.2%	8.1%	8.3%	7.8%
- Trip to other islands	2.5%	2.5%	2.3%	2.0%	2.0%
- Sporting activities	8.3%	9.1%	7.7%	7.9%	7.1%
- Cultural activities	4.9%	5.4%	5.2%	4.5%	4.9%
- Discos and disco-pubs	4.6%	3.7%	4.5%	3.6%	3.4%

Others:

- Wellness	7.0%	7.4%	6.3%	6.8%	6.1%
- Medical expenses	5.1%	4.4%	5.2%	4.8%	5.0%
- Other expenses	14.1%	10.7%	11.6%	10.3%	11.7%



What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	6.2%	5.9%	6.2%	4.9%	5.9%
Flight and accommodation (room only)	12.7%	12.8%	12.8%	13.3%	13.8%
Flight and accommodation (B&B)	4.8%	5.3%	5.2%	4.8%	5.8%
Flight and accommodation (half board)	32.0%	30.8%	30.4%	31.9%	29.3%
Flight and accommodation (full board)	4.6%	4.9%	4.4%	4.5%	4.4%
Flight and accommodation (all inclusive)	39.7%	40.4%	41.0%	40.6%	40.9%
% Tourists using low-cost airlines	18.9%	23.8%	27.1%	29.1%	33.0%

Other expenses in their place of residence:

- Car rental	14.3%	14.7%	15.2%	14.9%	17.0%
- Sporting activities	10.1%	9.6%	9.9%	9.1%	8.4%
- Excursions	7.5%	8.8%	9.6%	8.8%	9.4%
- Trip to other islands	3.6%	5.1%	5.0%	3.2%	2.7%

How do they book?



Accommodation booking	2013	2014	2015	2016	2017
Tour Operator	38.2%	40.3%	38.8%	40.0%	39.4%
- Tour Operator's website	63.2%	60.2%	60.9%	60.4%	65.0%
Accommodation	5.5%	5.7%	6.2%	5.3%	5.9%
- Accommodation's website	73.7%	75.9%	74.0%	75.5%	78.0%
Travel agency (High street)	36.9%	35.2%	34.3%	35.2%	33.0%
Online Travel Agency (OTA)	14.8%	14.5%	16.3%	16.3%	17.3%
No need to book accommodation	4.6%	4.3%	4.5%	3.2%	4.5%

Flight booking	2013	2014	2015	2016	2017
Tour Operator	40.1%	41.0%	41.2%	41.4%	41.0%
- Tour Operator's website	57.6%	57.9%	56.1%	55.5%	59.8%
Airline	9.6%	11.4%	11.5%	9.8%	11.6%
- Airline's website	92.6%	91.6%	91.7%	91.8%	94.7%
Travel agency (High street)	35.1%	33.1%	31.8%	32.9%	30.7%
Online Travel Agency (OTA)	15.2%	14.5%	15.5%	15.8%	16.7%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.4%	0.3%	0.4%	0.3%	0.2%
Between 2 and 7 days	6.7%	6.5%	5.6%	4.4%	4.2%
Between 8 and 15 days	9.9%	9.0%	8.0%	6.2%	6.0%
Between 16 and 30 days	16.8%	15.8%	15.5%	13.6%	12.2%
Between 31 and 90 days	31.2%	29.2%	32.4%	32.6%	32.3%
More than 90 days	35.0%	39.2%	38.1%	42.9%	45.0%

Who are they?



Gender	2013	2014	2015	2016	2017
Men	49.0%	50.3%	49.8%	49.7%	49.2%
Women	51.0%	49.7%	50.2%	50.3%	50.8%

Age

Average age (tourists > 16 years old)	44.4	45.3	46.0	47.6	48.4
Standard deviation	14.9	14.8	15.3	15.8	16.0

Age range (> 16 years old)

16-24 years old	9.4%	8.8%	8.9%	8.3%	8.2%
25-30 years old	14.0%	12.3%	12.6%	11.1%	10.4%
31-45 years old	29.1%	27.6%	25.0%	23.5%	21.7%
46-60 years old	32.0%	34.9%	35.2%	34.1%	34.8%
Over 60 years old	15.6%	16.3%	18.3%	23.0%	25.0%

Occupation

Business owner or self-employed	14.8%	15.1%	14.0%	13.9%	14.3%
Upper/Middle management employee	52.3%	51.8%	50.0%	48.0%	47.1%
Auxiliary level employee	11.2%	11.6%	12.2%	11.9%	11.3%
Students	6.7%	5.8%	6.5%	5.9%	6.0%
Retired	13.0%	13.6%	15.7%	18.8%	19.8%
Unemployed / unpaid dom. work	2.0%	2.0%	1.7%	1.5%	1.4%

Annual household income level

€12,000 - €24,000	16.0%	14.5%	14.5%	13.8%	14.2%
€24,001 - €36,000	18.5%	17.6%	17.0%	17.6%	16.9%
€36,001 - €48,000	17.8%	17.8%	18.0%	17.8%	16.3%
€48,001 - €60,000	15.5%	17.3%	16.9%	16.8%	17.1%
€60,001 - €72,000	9.7%	9.5%	9.8%	10.3%	10.7%
€72,001 - €84,000	6.4%	5.8%	6.0%	6.1%	7.3%
More than €84,000	16.0%	17.6%	17.7%	17.6%	17.5%

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Which island do they choose?



Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	235,733	251,440	247,710	298,196	304,899
- Fuerteventura	650,940	722,976	694,861	784,700	789,085
- Gran Canaria	638,700	698,575	715,643	846,822	866,202
- Tenerife	564,335	566,517	576,886	670,472	711,052
- La Palma	45,214	50,795	55,310	81,455	92,813

Where do they stay?



	2013	2014	2015	2016	2017
5* Hotel	5.2%	5.0%	4.2%	4.4%	4.7%
4* Hotel	46.2%	46.2%	47.4%	47.9%	46.1%
1-2-3* Hotel	17.8%	18.5%	17.0%	17.9%	16.9%
Apartment	21.8%	21.0%	21.5%	21.9%	22.8%
Property (privately-owned, friends, family)	4.0%	3.6%	3.8%	2.8%	3.5%
Others	5.0%	5.7%	6.2%	5.0%	6.1%

Who do they come with?



	2013	2014	2015	2016	2017
Unaccompanied	10.5%	10.4%	9.7%	9.3%	8.6%
Only with partner	53.2%	53.5%	57.1%	55.4%	56.2%
Only with children (under the age of 13)	1.7%	1.4%	1.0%	1.1%	1.2%
Partner + children (under the age of 13)	9.8%	10.3%	8.4%	8.8%	8.7%
Other relatives	5.2%	4.6%	5.7%	5.1%	4.5%
Friends	5.3%	5.2%	5.0%	5.8%	5.6%
Work colleagues	0.4%	0.2%	0.3%	0.1%	0.2%
Other combinations ⁽¹⁾	13.8%	14.3%	12.8%	14.4%	15.2%

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

How do they rate the Canary Islands?



	2013	2014	2015	2016	2017
Impression of their stay					
Good or very good (% tourists)	92.5%	93.2%	92.0%	93.6%	93.4%
Average rating (scale 1-10)	8.62	8.67	8.62	8.71	8.76

How many are loyal to the Canary Islands?



Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	76.0%	76.4%	76.7%	77.6%	77.8%
At least 10 previous visits	16.1%	14.7%	17.7%	16.4%	17.9%

Where does the flight come from?



Tourists (> 16 years old)	2013	2014	2015	2016	2017
Germany	95.0%	93.5%	93.8%	93.5%	92.1%
Spanish Mainland	2.9%	3.7%	3.1%	3.4%	4.2%
Switzerland	1.0%	1.4%	1.7%	2.1%	2.3%
Netherlands	0.0%	0.1%	0.1%	0.0%	0.3%
Belgium	0.1%	0.1%	0.1%	0.2%	0.2%
United Kingdom	0.0%	0.1%	0.1%	0.1%	0.1%
Austria	0.5%	0.2%	0.2%	0.1%	0.1%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Others	0.5%	0.8%	0.8%	0.5%	0.5%

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	11.0%	11.0%	10.8%	11.1%	11.0%
- Fuerteventura	30.5%	31.6%	30.3%	29.3%	28.5%
- Gran Canaria	29.9%	30.5%	31.2%	31.6%	31.3%
- Tenerife	26.4%	24.7%	25.2%	25.0%	25.7%
- La Palma	2.1%	2.2%	2.4%	3.0%	3.4%

Why do they choose the Canary Islands?



Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	94.3%	93.8%	93.3%	93.6%	94.1%
Beaches	46.0%	46.7%	45.7%	46.3%	46.6%
Tranquillity/rest/relaxation	47.9%	46.1%	44.6%	43.5%	44.3%
Scenery	29.7%	30.2%	31.7%	30.0%	31.6%
Security	5.5%	6.1%	8.9%	15.7%	13.3%
Visiting new places	13.3%	13.4%	13.2%	13.6%	13.1%
Active tourism	6.5%	7.1%	7.7%	6.5%	7.4%
Ease of travel	6.6%	6.2%	5.8%	5.5%	5.7%
Price	5.4%	6.1%	5.3%	5.2%	4.6%
Suitable destination for children	5.1%	5.3%	3.9%	4.2%	4.4%
Quality of the environment	2.8%	3.1%	3.5%	3.4%	3.4%
Nautical activities	3.8%	3.7%	3.2%	3.1%	2.9%
Culture	2.0%	1.9%	2.0%	2.0%	2.0%
Theme parks	2.0%	1.8%	2.0%	1.8%	1.5%
Rural tourism	1.3%	1.4%	1.3%	1.5%	1.3%
Shopping	1.3%	1.5%	1.6%	1.4%	1.2%

* Multi-choice question

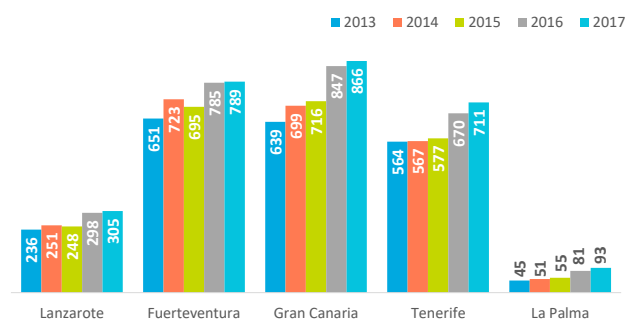
What did motivate them to come?



Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	64.9%	64.8%	65.5%	66.0%	65.9%
Recommendation by friends/relatives	29.8%	29.8%	28.8%	30.5%	31.7%
The Canary Islands television channel	0.5%	0.4%	0.5%	0.6%	0.7%
Other television or radio channels	1.2%	1.0%	1.2%	1.4%	1.6%
Information in press/magazines/books	4.5%	4.5%	4.1%	4.2%	3.8%
Attendance at a tourism fair	0.3%	0.4%	0.4%	0.5%	0.4%
Tour Operator's brochure or catalogue	9.9%	10.1%	9.0%	9.5%	7.7%
Recommendation by Travel Agency	18.4%	16.6%	17.2%	17.9%	16.6%
Information obtained via the Internet	21.3%	21.6%	21.5%	22.7%	23.6%
Senior Tourism programme	0.1%	0.1%	0.1%	0.0%	0.1%
Others	5.3%	5.7%	5.6%	5.0%	5.1%

* Multi-choice question

Tourist arrivals by islands (thousands)



Tourists over 16 years old.

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.