

Tourist profile trend (2016)

Germany: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	595,046	679,237	648,721	674,020	768,719
Average daily expenditure (€)	133.23	137.05	134.25	138.31	149.33
. in their place of residence	103.35	108.45	104.80	108.90	118.66
. in the Canary Islands	29.88	28.61	29.45	29.41	30.67
Average length of stay	10.45	9.90	10.32	10.55	9.79
Turnover per tourist (€)	1,272	1,217	1,228	1,318	1,335
Total turnover (> 16 years old) (€m)	757	826	796	888	1,026
Share of total turnover	27.7%	30.6%	27.5%	29.9%	28.8%
Share of total tourist	27.0%	31.2%	27.8%	28.8%	28.2%

Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	27.54	27.60	33.19	36.33	41.66
- Accommodation	22.74	23.58	26.71	30.12	34.56
- Additional accommodation expenses	4.80	4.02	6.48	6.20	7.10
Transport:	27.94	25.40	26.69	26.56	28.38
- Public transport	4.12	3.56	4.07	3.44	3.74
- Taxi	5.46	4.19	5.00	4.87	5.44
- Car rental	18.36	17.65	17.63	18.25	19.19
Food and drink:	114.48	104.60	120.46	120.30	102.40
- Food purchases at supermarkets	47.53	46.52	50.48	50.28	41.76
- Restaurants	66.96	58.08	69.98	70.02	60.64
Souvenirs:	60.93	58.38	58.98	56.19	57.74
Leisure:	44.17	37.85	36.27	36.36	36.91
- Organized excursions	19.46	19.87	17.05	18.68	19.02
- Leisure, amusement	5.64	4.62	4.72	4.43	3.33
- Trip to other islands	2.51	1.39	1.30	1.56	1.55
- Sporting activities	6.15	6.57	6.80	6.57	6.53
- Cultural activities	3.60	1.98	2.34	2.16	1.79
- Discos and disco-pubs	6.81	3.42	4.05	2.96	4.69
Others:	20.58	15.97	15.36	22.07	17.14
- Wellness	5.82	4.12	4.74	4.47	3.98
- Medical expenses	2.61	2.10	1.83	2.07	3.32
- Other expenses	12.15	9.75	8.79	15.53	9.84

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.2%	0.5%	0.4%	0.4%	0.2%
Between 2 and 7 days	6.0%	6.4%	5.9%	6.4%	4.6%
Between 8 and 15 days	8.6%	9.0%	9.3%	7.5%	5.3%
Between 16 and 30 days	15.3%	16.2%	15.3%	14.5%	14.7%
Between 31 and 90 days	33.1%	31.6%	31.7%	34.7%	32.9%
More than 90 days	36.7%	36.2%	37.4%	36.5%	42.3%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	5.6%	6.4%	6.8%	5.7%	4.6%
Flight and accommodation (room only)	12.8%	12.5%	14.1%	14.6%	15.0%
Flight and accommodation (B&B)	6.2%	5.2%	6.6%	5.1%	4.9%
Flight and accommodation (half board)	33.6%	29.9%	29.3%	29.1%	30.7%
Flight and accommodation (full board)	6.0%	6.1%	6.3%	5.6%	5.2%
Flight and accommodation (all inclusive)	35.8%	40.0%	36.9%	39.9%	39.7%
% Tourists using low-cost airlines	16.2%	25.0%	26.8%	31.0%	31.1%
Other expenses in their place of residence:					
- Car rental	14.4%	15.0%	16.4%	15.6%	15.1%
- Sporting activities	8.8%	9.8%	9.9%	8.3%	9.2%
- Excursions	7.1%	7.6%	8.6%	10.3%	7.9%
- Trip to other islands	3.5%	6.8%	5.7%	7.4%	2.5%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	39.6%	37.8%	39.9%	39.6%	38.8%
- Tour Operator's website	53.4%	65.6%	58.8%	60.4%	59.8%
Accommodation	6.4%	5.5%	6.8%	6.8%	6.1%
- Accommodation's website	83.0%	75.1%	76.2%	74.5%	81.2%
Travel agency (High street)	38.1%	35.4%	33.2%	32.4%	35.4%
Online Travel Agency (OTA)	12.3%	16.2%	14.8%	16.8%	16.8%
No need to book accommodation	3.6%	5.1%	5.3%	4.3%	3.0%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	41.7%	39.2%	40.5%	42.6%	40.3%
- Tour Operator's website	49.4%	61.2%	57.8%	58.9%	51.2%
Airline	10.4%	9.8%	13.3%	11.5%	10.8%
- Airline's website	89.4%	92.2%	92.2%	90.1%	93.8%
Travel agency (High street)	35.5%	34.3%	32.0%	30.4%	32.6%
Online Travel Agency (OTA)	12.4%	16.7%	14.2%	15.5%	16.3%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	5.8%	5.3%	5.4%	4.3%	3.8%
4* Hotel	44.4%	44.8%	44.2%	45.1%	47.6%
1-2-3* Hotel	18.4%	14.6%	17.3%	15.3%	17.1%
Apartment	21.9%	21.5%	21.0%	22.7%	23.1%
Property (privately-owned, friends, family)	2.9%	4.4%	4.2%	3.6%	2.7%
Others	6.7%	9.5%	7.9%	9.1%	5.7%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	52.7%	49.9%	49.8%	49.9%	50.4%
Percentage of women	47.3%	50.1%	50.2%	50.1%	49.6%

Age					
Average age (tourists > 16 years old)	46.5	44.7	46.8	48.7	48.4
Standard deviation	14.6	14.0	14.1	14.8	15.4

Age range (> 16 years old)					
16-24 years old	6.8%	6.9%	5.7%	4.8%	6.5%
25-30 years old	11.3%	13.8%	10.7%	10.7%	10.3%
31-45 years old	27.4%	30.7%	28.9%	23.0%	24.1%
46-60 years old	36.1%	34.9%	38.0%	39.1%	35.1%
Over 60 years old	18.4%	13.7%	16.7%	22.3%	24.0%

Occupation					
Business owner or self-employed	15.0%	14.7%	15.4%	15.2%	15.4%
Upper/Middle management employee	52.8%	57.3%	54.9%	50.3%	48.3%
Auxiliary level employee	11.4%	10.4%	9.0%	9.4%	11.4%
Students	3.6%	5.1%	4.3%	4.3%	4.4%
Retired	15.8%	10.6%	14.6%	19.0%	19.4%
Unemployed / unpaid dom. work	1.5%	1.9%	1.7%	1.8%	1.1%

Annual household income level					
€12,000 - €24,000	13.8%	11.9%	11.4%	12.5%	10.2%
€24,001 - €36,000	22.5%	17.8%	16.3%	17.3%	16.1%
€36,001 - €48,000	18.3%	18.1%	17.0%	18.2%	19.0%
€48,001 - €60,000	16.2%	15.6%	19.9%	16.8%	16.5%
€60,001 - €72,000	7.9%	10.7%	10.0%	10.1%	9.5%
€72,001 - €84,000	7.4%	6.4%	5.5%	6.1%	7.7%
More than €84,000	13.9%	19.5%	19.8%	19.0%	21.0%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	64,065	69,884	65,989	71,092	88,860
- Fuerteventura	171,046	186,784	186,339	179,428	206,401
- Gran Canaria	175,798	226,147	210,696	227,846	254,719
- Tenerife	159,930	165,933	154,732	164,428	179,745
- La Palma	14,868	14,795	16,136	15,803	24,528

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	10.9%	10.5%	10.4%	10.8%	11.8%
- Fuerteventura	29.2%	28.1%	29.4%	27.2%	27.4%
- Gran Canaria	30.0%	34.1%	33.2%	34.6%	33.8%
- Tenerife	27.3%	25.0%	24.4%	25.0%	23.8%
- La Palma	2.5%	2.2%	2.5%	2.4%	3.3%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	11.0%	10.5%	11.6%	10.3%	9.8%
Only with partner	58.4%	51.9%	52.0%	60.2%	52.5%
Only with children (under the age of 13)	0.8%	1.4%	1.2%	1.0%	1.3%
Partner + children (under the age of 13)	6.6%	9.9%	9.8%	5.9%	8.1%
Other relatives	5.8%	5.3%	5.7%	6.0%	6.4%
Friends	5.6%	5.6%	5.0%	4.8%	6.0%
Work colleagues	0.5%	0.4%	0.3%	0.4%	0.2%
Other combinations ⁽¹⁾	11.3%	15.0%	14.3%	11.5%	15.7%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	91.9%	93.2%	93.5%	93.0%	92.5%
Average rating (scale 1-10)	8.52	8.65	8.68	8.68	8.66

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	79.0%	76.9%	77.9%	80.6%	78.8%
In love (at least 10 previous visits)	18.0%	15.4%	16.7%	21.1%	17.9%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Germany	94.7%	93.8%	92.7%	93.3%	93.7%
Spanish Mainland	2.9%	3.6%	5.4%	3.8%	4.1%
Switzerland	0.8%	1.2%	0.6%	1.3%	1.4%
Belgium	0.4%	0.1%	0.2%	0.2%	0.2%
Austria	0.3%	0.4%	0.2%	0.1%	0.1%
Sweden	0.0%	0.0%	0.0%	0.1%	0.1%
United Kingdom	0.0%	0.1%	0.1%	0.2%	0.0%
Netherlands	0.1%	0.0%	0.1%	0.0%	0.0%
Italy	0.0%	0.0%	0.0%	0.0%	0.0%
France	0.0%	0.0%	0.1%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	94.9%	94.5%	93.5%	94.5%	94.6%
Beaches	48.2%	44.0%	44.2%	44.9%	46.6%
Tranquillity/rest/relaxation	46.6%	46.2%	45.5%	43.0%	44.0%
Scenery	29.7%	30.4%	30.3%	32.7%	30.3%
Security	6.1%	5.7%	7.3%	11.8%	15.2%
Visiting new places	11.9%	13.3%	12.1%	12.3%	13.2%
Ease of travel	7.0%	7.3%	6.5%	6.7%	6.3%
Active tourism	6.5%	7.1%	8.6%	7.6%	5.9%
Suitable destination for children	3.6%	5.1%	5.0%	2.7%	4.4%
Price	5.8%	5.1%	6.1%	4.7%	4.0%
Nautical activities	2.8%	4.3%	2.8%	3.1%	3.3%
Quality of the environment	3.5%	2.7%	3.6%	3.2%	3.2%
Culture	1.3%	2.1%	2.1%	1.8%	1.7%
Shopping	1.4%	1.6%	1.4%	1.6%	1.7%
Rural tourism	1.4%	1.2%	1.2%	1.2%	1.3%
Nightlife/fun	2.6%	1.6%	1.6%	1.7%	1.2%

* Multi-choice question

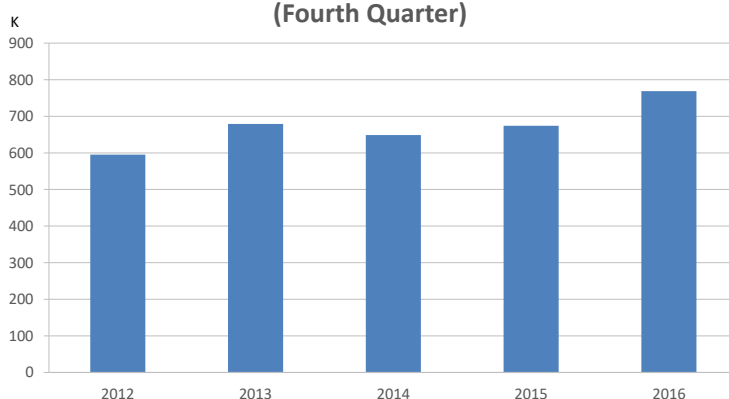
What did motivate them to come?



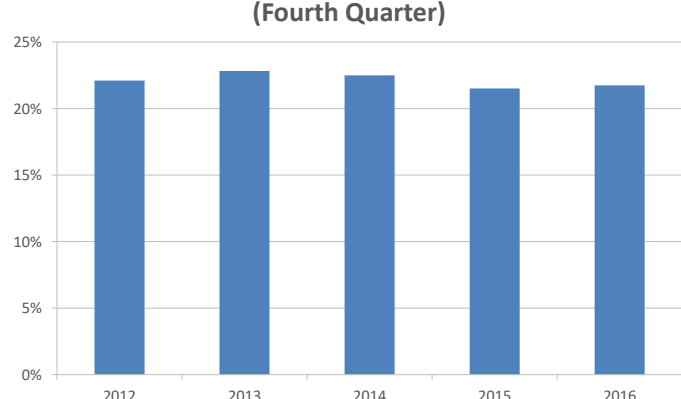
Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	68.2%	65.5%	67.2%	70.1%	67.9%
Recommendation by friends or relatives	31.2%	28.9%	29.1%	26.7%	29.6%
The Canary Islands television channel	0.6%	0.5%	0.2%	0.3%	0.5%
Other television or radio channels	1.0%	1.2%	0.8%	1.2%	0.7%
Information in the press/magazines/books	5.2%	5.1%	4.4%	3.3%	4.7%
Attendance at a tourism fair	0.8%	0.3%	0.4%	0.3%	0.4%
Tour Operator's brochure or catalogue	10.3%	8.4%	8.0%	7.1%	8.6%
Recommendation by Travel Agency	15.6%	16.7%	14.9%	14.9%	17.5%
Information obtained via the Internet	18.1%	21.1%	20.2%	20.0%	20.5%
Senior Tourism programme	0.0%	0.0%	0.0%	0.1%	0.0%
Others	5.6%	6.6%	6.6%	6.5%	5.6%

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(Fourth Quarter)



Share of tourists (> 16 years old)
(Fourth Quarter)



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.