

Tourist profile trend (2017)

GERMANY: Fourth Quarter



How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	787,383	771,446	777,422	851,492	883,839
Tourist arrivals (> 16 years old)	679,237	648,721	674,020	768,719	823,975
Average daily expenditure (€)	137.05	134.25	138.31	149.33	148.90
. in their place of residence	108.45	104.80	108.90	118.66	118.90
. in the Canary Islands	28.61	29.45	29.41	30.67	30.00
Average lenght of stay	9.90	10.32	10.55	9.79	10.09
Turnover per tourist (€)	1,217	1,228	1,318	1,335	1,382
Total turnover (> 16 years old) (€m)	958	947	1,025	1,137	1,221
Share of annual tourist	30.9%	28.0%	28.3%	28.2%	28.3%
Share of annual turnover	30.2%	27.7%	29.3%	28.8%	29.5%

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	9.8%	9.1%	9.6%	9.9%	9.6%
- Additional accommodation expenses	6.0%	7.0%	6.5%	6.7%	5.3%

Transport:

- Public transport	13.6%	16.6%	14.8%	13.8%	12.2%
- Taxi	14.9%	15.9%	14.6%	16.0%	12.5%
- Car rental	23.0%	23.5%	22.0%	22.1%	23.2%

Food and drink:

- Food purchases at supermarkets	51.1%	47.7%	47.3%	47.6%	48.1%
- Restaurants	47.5%	50.9%	47.6%	46.9%	51.8%

Souvenirs:	59.6%	57.9%	52.6%	54.1%	50.5%
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Leisure:

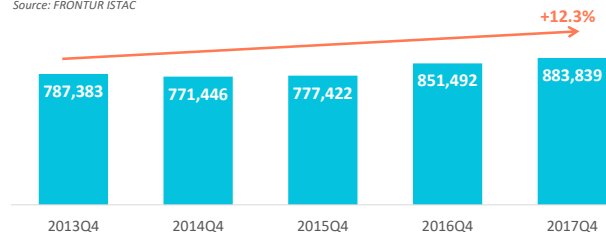
- Organized excursions	21.0%	18.7%	19.5%	20.4%	19.9%
- Leisure, amusement	8.5%	8.8%	7.4%	6.0%	8.4%
- Trip to other islands	2.1%	2.2%	2.2%	2.0%	1.8%
- Sporting activities	8.4%	7.7%	6.8%	6.8%	7.8%
- Cultural activities	4.7%	5.5%	5.1%	3.9%	5.8%
- Discos and disco-pubs	3.5%	3.6%	4.3%	4.3%	2.6%

Others:

- Wellness	6.3%	7.5%	7.0%	7.3%	5.5%
- Medical expenses	3.8%	3.6%	4.7%	4.6%	4.4%
- Other expenses	12.6%	11.2%	11.7%	10.6%	9.6%

TOURIST ARRIVALS

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	6.4%	6.8%	5.7%	4.6%	5.1%
Flight and accommodation (room only)	12.5%	14.1%	14.6%	15.0%	15.0%
Flight and accommodation (B&B)	5.2%	6.6%	5.1%	4.9%	6.2%
Flight and accommodation (half board)	29.9%	29.3%	29.1%	30.7%	28.3%
Flight and accommodation (full board)	6.1%	6.3%	5.6%	5.2%	5.4%
Flight and accommodation (all inclusive)	40.0%	36.9%	39.9%	39.7%	40.1%
% Tourists using low-cost airlines	25.0%	26.8%	31.0%	31.1%	35.0%

Other expenses in their place of residence:

- Car rental	15.0%	16.4%	15.6%	15.1%	18.7%
- Sporting activities	9.8%	9.9%	8.3%	9.2%	8.7%
- Excursions	7.6%	8.6%	10.3%	7.9%	9.5%
- Trip to other islands	6.8%	5.7%	7.4%	2.5%	3.0%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	37.8%	39.9%	39.6%	38.8%	38.6%
- Tour Operator's website	65.6%	58.8%	60.4%	59.8%	65.2%
Accommodation	5.5%	6.8%	6.8%	6.1%	5.5%
- Accommodation's website	75.1%	76.2%	74.5%	81.2%	77.6%
Travel agency (High street)	35.4%	33.2%	32.4%	35.4%	34.1%
Online Travel Agency (OTA)	16.2%	14.8%	16.8%	16.8%	17.7%
No need to book accommodation	5.1%	5.3%	4.3%	3.0%	4.1%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	39.2%	40.5%	42.6%	40.3%	40.0%
- Tour Operator's website	61.2%	57.8%	58.9%	51.2%	59.0%
Airline	9.8%	13.3%	11.5%	10.8%	12.9%
- Airline's website	92.2%	92.2%	90.1%	93.8%	94.2%
Travel agency (High street)	34.3%	32.0%	30.4%	32.6%	31.3%
Online Travel Agency (OTA)	16.7%	14.2%	15.5%	16.3%	15.8%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.5%	0.4%	0.4%	0.2%	0.2%
Between 2 and 7 days	6.4%	5.9%	6.4%	4.6%	3.3%
Between 8 and 15 days	9.0%	9.3%	7.5%	5.3%	5.2%
Between 16 and 30 days	16.2%	15.3%	14.5%	14.7%	9.9%
Between 31 and 90 days	31.6%	31.7%	34.7%	32.9%	31.7%
More than 90 days	36.2%	37.4%	36.5%	42.3%	49.7%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	49.9%	49.8%	49.9%	50.4%	49.6%
Women	50.1%	50.2%	50.1%	49.6%	50.4%

Age

Average age (tourists > 16 years old)	44.7	46.8	48.7	48.4	50.5
Standard deviation	14.0	14.1	14.8	15.4	15.2

Age range (> 16 years old)

16-24 years old	6.9%	5.7%	4.8%	6.5%	4.4%
25-30 years old	13.8%	10.7%	10.7%	10.3%	9.4%
31-45 years old	30.7%	28.9%	23.0%	24.1%	21.0%
46-60 years old	34.9%	38.0%	39.1%	35.1%	37.5%
Over 60 years old	13.7%	16.7%	22.3%	24.0%	27.7%

Occupation

Business owner or self-employed	14.7%	15.4%	15.2%	15.4%	14.3%
Upper/Middle management employee	57.3%	54.9%	50.3%	48.3%	48.5%
Auxiliary level employee	10.4%	9.0%	9.4%	11.4%	10.0%
Students	5.1%	4.3%	4.3%	4.4%	3.9%
Retired	10.6%	14.6%	19.0%	19.4%	21.7%
Unemployed / unpaid dom. work	1.9%	1.7%	1.8%	1.1%	1.5%

Annual household income level

€12,000 - €24,000	11.9%	11.4%	12.5%	10.2%	10.3%
€24,001 - €36,000	17.8%	16.3%	17.3%	16.1%	16.3%
€36,001 - €48,000	18.1%	17.0%	18.2%	19.0%	16.3%
€48,001 - €60,000	15.6%	19.9%	16.8%	16.5%	17.6%
€60,001 - €72,000	10.7%	10.0%	10.1%	9.5%	11.5%
€72,001 - €84,000	6.4%	5.5%	6.1%	7.7%	8.3%
More than €84,000	19.5%	19.8%	19.0%	21.0%	19.7%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	69,884	65,989	71,092	88,860	92,661
- Fuerteventura	186,784	186,339	179,428	206,401	220,226
- Gran Canaria	226,147	210,696	227,846	254,719	254,660
- Tenerife	165,933	154,732	164,428	179,745	218,804
- La Palma	14,795	16,136	15,803	24,528	27,716

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	10.5%	10.4%	10.8%	11.8%	11.4%
- Fuerteventura	28.1%	29.4%	27.2%	27.4%	27.1%
- Gran Canaria	34.1%	33.2%	34.6%	33.8%	31.3%
- Tenerife	25.0%	24.4%	25.0%	23.8%	26.9%
- La Palma	2.2%	2.5%	2.4%	3.3%	3.4%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	5.3%	5.4%	4.3%	3.8%	4.9%
4* Hotel	44.8%	44.2%	45.1%	47.6%	43.8%
1-2-3* Hotel	14.6%	17.3%	15.3%	17.1%	16.8%
Apartment	21.5%	21.0%	22.7%	23.1%	23.6%
Property (privately-owned, friends, family)	4.4%	4.2%	3.6%	2.7%	3.0%
Others	9.5%	7.9%	9.1%	5.7%	8.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	94.5%	93.5%	94.5%	94.6%	95.5%
Beaches	44.0%	44.2%	44.9%	46.6%	46.0%
Tranquillity/rest/relaxation	46.2%	45.5%	43.0%	44.0%	44.3%
Scenery	30.4%	30.3%	32.7%	30.3%	32.0%
Visiting new places	13.3%	12.1%	12.3%	13.2%	12.5%
Security	5.7%	7.3%	11.8%	15.2%	11.7%
Active tourism	7.1%	8.6%	7.6%	5.9%	8.6%
Ease of travel	7.3%	6.5%	6.7%	6.3%	6.7%
Price	5.1%	6.1%	4.7%	4.0%	2.9%
Suitable destination for children	5.1%	5.0%	2.7%	4.4%	4.5%
Nautical activities	4.3%	2.8%	3.1%	3.3%	2.9%
Quality of the environment	2.7%	3.6%	3.2%	3.2%	3.2%
Culture	2.1%	2.1%	1.8%	1.7%	1.7%
Shopping	1.6%	1.4%	1.6%	1.7%	1.1%
Nightlife/fun	1.6%	1.6%	1.7%	1.2%	1.1%
Rural tourism	1.2%	1.2%	1.2%	1.3%	1.3%

* Multi-choise question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	10.5%	11.6%	10.3%	9.8%	7.4%
Only with partner	51.9%	52.0%	60.2%	52.5%	55.2%
Only with children (under the age of 13)	1.4%	1.2%	1.0%	1.3%	1.4%
Partner + children (under the age of 13)	9.9%	9.8%	5.9%	8.1%	8.1%
Other relatives	5.3%	5.7%	6.0%	6.4%	5.1%
Friends	5.6%	5.0%	4.8%	6.0%	5.6%
Work colleagues	0.4%	0.3%	0.4%	0.2%	0.2%
Other combinations ⁽¹⁾	15.0%	14.3%	11.5%	15.7%	17.2%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	93.2%	93.5%	93.0%	92.5%	93.5%
Average rating (scale 1-10)	8.65	8.68	8.68	8.66	8.77

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	76.9%	77.9%	80.6%	78.8%	79.8%
At least 10 previous visits	15.4%	16.7%	21.1%	17.9%	18.6%

Where does the flight come from?

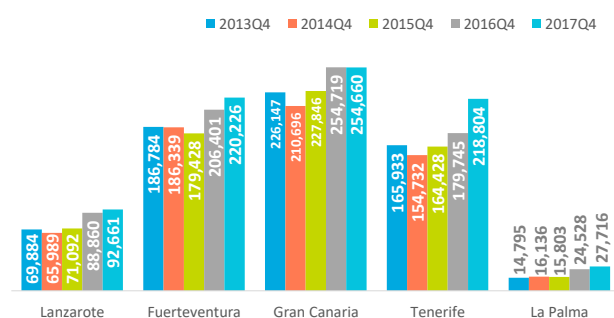
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Germany	93.8%	92.7%	93.3%	93.7%	89.8%
Spanish Mainland	3.6%	5.4%	3.8%	4.1%	6.2%
Switzerland	1.2%	0.6%	1.3%	1.4%	1.7%
Netherlands	0.0%	0.1%	0.0%	0.0%	0.7%
Belgium	0.1%	0.2%	0.2%	0.2%	0.3%
Austria	0.4%	0.2%	0.1%	0.1%	0.3%
Norway	0.0%	0.1%	0.0%	0.0%	0.1%
France	0.0%	0.1%	0.0%	0.0%	0.1%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
Others	0.9%	0.7%	1.2%	0.5%	0.6%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	65.5%	67.2%	70.1%	67.9%	67.6%
Recommendation by friends/relatives	28.9%	29.1%	26.7%	29.6%	32.0%
The Canary Islands television channel	0.5%	0.2%	0.3%	0.5%	0.4%
Other television or radio channels	1.2%	0.8%	1.2%	0.7%	1.8%
Information in press/magazines/books	5.1%	4.4%	3.3%	4.7%	3.5%
Attendance at a tourism fair	0.3%	0.4%	0.3%	0.4%	0.4%
Tour Operator's brochure or catalogue	8.4%	8.0%	7.1%	8.6%	7.5%
Recommendation by Travel Agency	16.7%	14.9%	14.9%	17.5%	15.4%
Information obtained via the Internet	21.1%	20.2%	20.0%	20.5%	21.3%
Senior Tourism programme	0.0%	0.0%	0.1%	0.0%	0.1%
Others	6.6%	6.6%	6.5%	5.6%	5.3%

* Multi-choise question

Tourist arrivals by islands



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.