

# Tourist profile trend (2016)

## Germany: First Quarter

### How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	649,510	591,643	657,319	672,698	736,792
Average daily expenditure (€)	126.77	132.06	130.97	129.94	140.75
. in their place of residence	96.78	101.51	101.69	100.74	110.62
. in the Canary Islands	29.99	30.55	29.28	29.20	30.13
Average length of stay	11.89	11.67	12.10	11.89	11.53
Turnover per tourist (€)	1,310	1,340	1,370	1,334	1,404
Total turnover (> 16 years old) (€m)	851	793	901	897	1,034
Share of total turnover	31.1%	29.3%	31.1%	30.2%	29.0%
Share of total tourist	29.5%	27.2%	28.1%	28.7%	27.0%

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

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
<b>Accommodation (**):</b>	36.11	41.44	39.09	42.39	49.34
- Accommodation	28.23	35.87	34.01	34.88	42.05
- Additional accommodation expenses	7.88	5.57	5.09	7.51	7.29
<b>Transport:</b>	34.36	33.85	31.29	33.55	31.16
- Public transport	4.82	5.14	4.84	5.21	4.53
- Taxi	5.88	5.29	5.39	4.78	4.39
- Car rental	23.66	23.42	21.06	23.56	22.24
<b>Food and drink:</b>	128.50	133.95	141.74	143.14	143.08
- Food purchases at supermarkets	54.97	59.59	66.91	69.72	65.40
- Restaurants	73.53	74.36	74.83	73.42	77.69
<b>Souvenirs:</b>	64.49	64.63	68.97	62.25	53.95
<b>Leisure:</b>	40.11	41.91	36.71	37.28	34.20
- Organized excursions	18.33	17.96	18.58	16.28	15.74
- Leisure, amusement	5.85	4.99	4.71	2.95	3.66
- Trip to other islands	1.93	2.01	1.40	1.76	1.45
- Sporting activities	7.66	9.85	7.20	9.49	9.86
- Cultural activities	2.29	1.88	1.89	2.41	2.00
- Discos and disco-pubs	4.05	5.21	2.92	4.40	1.49
<b>Others:</b>	36.60	21.65	16.42	19.87	21.82
- Wellness	6.12	5.98	5.51	3.15	5.65
- Medical expenses	6.49	2.80	2.89	4.65	2.31
- Other expenses	23.99	12.87	8.02	12.07	13.87

### How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.3%	0.4%	0.3%	0.3%	0.5%
Between 2 and 7 days	7.5%	5.8%	4.8%	4.9%	4.0%
Between 8 and 15 days	10.6%	9.2%	8.7%	8.1%	7.9%
Between 16 and 30 days	18.9%	18.2%	17.6%	17.5%	14.4%
Between 31 and 90 days	32.2%	34.2%	31.9%	32.9%	36.1%
More than 90 days	30.4%	32.3%	36.6%	36.3%	37.2%

### What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	7.1%	6.2%	7.8%	7.8%	5.4%
Flight and accommodation (room only)	15.4%	15.7%	15.1%	15.5%	16.0%
Flight and accommodation (B&B)	5.6%	5.4%	6.3%	5.9%	5.9%
Flight and accommodation (half board)	32.8%	32.8%	30.2%	29.5%	32.1%
Flight and accommodation (full board)	3.0%	5.4%	5.7%	5.0%	5.0%
Flight and accommodation (all inclusive)	36.1%	34.6%	35.0%	36.3%	35.6%
<b>% Tourists using low-cost airlines</b>	16.0%	16.1%	20.5%	24.9%	28.1%

### Other expenses in their place of residence:

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Car rental	15.4%	15.3%	15.9%	18.1%	17.1%
- Sporting activities	8.3%	10.2%	9.5%	10.9%	9.9%
- Excursions	7.2%	6.9%	9.3%	9.7%	8.9%
- Trip to other islands	2.4%	3.4%	9.3%	7.5%	5.2%

### How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	47.3%	41.4%	42.9%	39.7%	41.8%
- Tour Operator's website	53.4%	63.0%	60.1%	61.9%	60.9%
<b>Accommodation</b>	5.2%	6.5%	6.5%	7.5%	6.2%
- Accommodation's website	76.4%	71.6%	73.5%	75.7%	71.9%
<b>Travel agency (High street)</b>	27.7%	33.4%	31.6%	30.2%	32.4%
<b>Online Travel Agency (OTA)</b>	14.2%	14.9%	13.6%	17.1%	16.5%
<b>No need to book accommodation</b>	5.5%	3.8%	5.4%	5.5%	3.1%

### Flight booking

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
<b>Tour Operator</b>	53.9%	43.4%	42.8%	40.8%	42.7%
- Tour Operator's website	52.6%	58.5%	58.1%	56.8%	56.0%
<b>Airline</b>	9.4%	10.6%	13.5%	14.9%	11.6%
- Airline's website	92.8%	94.5%	90.5%	95.2%	92.9%
<b>Travel agency (High street)</b>	23.0%	32.0%	29.3%	28.2%	30.0%
<b>Online Travel Agency (OTA)</b>	13.8%	14.0%	14.4%	16.2%	15.6%

### Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	5.2%	5.0%	5.3%	3.1%	5.3%
4* Hotel	44.0%	43.1%	42.1%	42.7%	44.1%
1-2-3* Hotel	18.5%	17.5%	15.6%	16.8%	16.8%
Apartment	22.2%	25.1%	22.2%	23.2%	24.0%
Property (privately-owned, friends, family)	4.0%	3.2%	4.4%	4.4%	2.8%
Others	6.1%	6.1%	10.4%	9.9%	7.0%

### Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
<b>Gender</b>					
Percentage of men	51.0%	49.5%	51.3%	51.0%	50.6%
Percentage of women	49.0%	50.5%	48.7%	49.0%	49.4%

### Age

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Average age (tourists > 16 years old)	50.0	48.6	50.0	49.4	51.2
Standard deviation	15.2	14.7	14.8	15.3	15.4

### Age range (> 16 years old)

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
16-24 years old	5.7%	5.1%	5.2%	6.2%	5.0%
25-30 years old	8.1%	8.6%	7.9%	8.6%	6.8%
31-45 years old	23.2%	29.3%	23.5%	23.3%	23.5%
46-60 years old	35.4%	33.2%	36.3%	36.4%	34.4%
Over 60 years old	27.7%	23.8%	27.2%	25.5%	30.3%

### Occupation

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Business owner or self-employed	18.1%	18.8%	19.2%	16.0%	17.2%
Upper/Middle management employee	41.6%	44.7%	43.5%	45.8%	43.0%
Auxiliary level employee	9.0%	9.2%	9.6%	9.8%	8.9%
Students	4.5%	4.8%	4.3%	5.1%	5.0%
Retired	24.9%	20.4%	22.0%	22.0%	24.3%
Unemployed / unpaid dom. work	1.9%	2.1%	1.5%	1.2%	1.6%

### Annual household income level

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
€12,000 - €24,000	17.0%	16.0%	13.8%	15.3%	13.2%
€24,001 - €36,000	21.5%	17.2%	16.3%	17.1%	17.4%
€36,001 - €48,000	18.6%	18.9%	18.2%	18.2%	17.0%
€48,001 - €60,000	14.6%	16.3%	17.1%	16.6%	15.1%
€60,001 - €72,000	8.6%	10.0%	9.5%	8.5%	11.1%
€72,001 - €84,000	5.8%	6.4%	6.0%	5.6%	6.2%
More than €84,000	13.9%	15.2%	19.1%	18.6%	19.9%

(\*) 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.

## Tourist profile trend (2016)

### Germany: First Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	64,715	68,842	69,337	71,353	77,865
- Fuerteventura	166,449	159,836	165,972	175,214	195,204
- Gran Canaria	209,067	162,859	215,823	210,313	232,375
- Tenerife	176,382	174,974	172,854	181,653	187,761
- La Palma	18,759	15,336	17,279	17,834	26,559

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	10.2%	11.8%	10.8%	10.9%	10.8%
- Fuerteventura	26.2%	27.5%	25.9%	26.7%	27.1%
- Gran Canaria	32.9%	28.0%	33.7%	32.0%	32.3%
- Tenerife	27.8%	30.1%	27.0%	27.7%	26.1%
- La Palma	3.0%	2.6%	2.7%	2.7%	3.7%

#### Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	11.7%	11.1%	11.5%	11.9%	10.9%
Only with partner	63.0%	56.5%	59.4%	59.5%	57.0%
Only with children (under the age of 13)	0.7%	1.6%	1.2%	0.6%	1.1%
Partner + children (under the age of 13)	4.7%	9.7%	7.2%	5.8%	8.3%
Other relatives	3.9%	5.0%	3.4%	5.0%	4.0%
Friends	6.5%	4.4%	5.6%	5.8%	5.8%
Work colleagues	0.4%	0.4%	0.1%	0.2%	0.3%
Other combinations <sup>(1)</sup>	9.1%	11.4%	11.5%	11.2%	12.6%

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

#### How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	91.5%	92.8%	92.9%	89.6%	93.8%
Average rating (scale 1-10)	8.47	8.63	8.63	8.45	8.72

#### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	83.0%	82.1%	82.5%	81.9%	85.2%
In love (at least 10 previous visits)	19.3%	20.2%	19.0%	20.0%	20.8%

#### Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Germany	96.6%	96.6%	94.9%	94.7%	94.3%
Spanish Mainland	1.6%	1.7%	2.7%	2.4%	2.1%
Switzerland	0.6%	0.6%	0.9%	1.7%	2.1%
Belgium	0.0%	0.0%	0.1%	0.0%	0.3%
Austria	0.3%	0.8%	0.3%	0.4%	0.3%
United Kingdom	0.1%	0.1%	0.1%	0.0%	0.2%
Netherlands	0.2%	0.0%	0.1%	0.1%	0.1%
Norway	0.0%	0.0%	0.0%	0.1%	0.1%
France	0.1%	0.0%	0.1%	0.1%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%



#### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	94.8%	95.4%	95.1%	93.1%	94.8%
Tranquillity/rest/relaxation	45.7%	45.7%	43.3%	42.5%	42.0%
Beaches	37.1%	39.3%	36.3%	35.7%	39.3%
Scenery	33.3%	33.8%	35.4%	37.8%	35.5%
Security	6.2%	5.6%	6.6%	7.0%	12.7%
Visiting new places	12.8%	11.7%	13.8%	11.8%	11.2%
Active tourism	7.7%	7.7%	8.6%	10.3%	9.4%
Ease of travel	10.3%	8.3%	9.8%	7.5%	7.4%
Price	6.2%	5.0%	4.3%	4.5%	4.4%
Suitable destination for children	3.0%	4.9%	4.1%	3.0%	4.2%
Quality of the environment	2.8%	3.0%	3.4%	4.2%	4.1%
Nautical activities	2.5%	2.6%	3.5%	2.6%	2.7%
Golf	1.4%	1.7%	1.5%	1.5%	1.7%
Culture	1.8%	1.8%	1.7%	2.2%	1.6%
Rural tourism	1.4%	1.8%	1.6%	1.3%	1.5%
Theme parks	1.2%	1.5%	1.0%	1.2%	1.4%

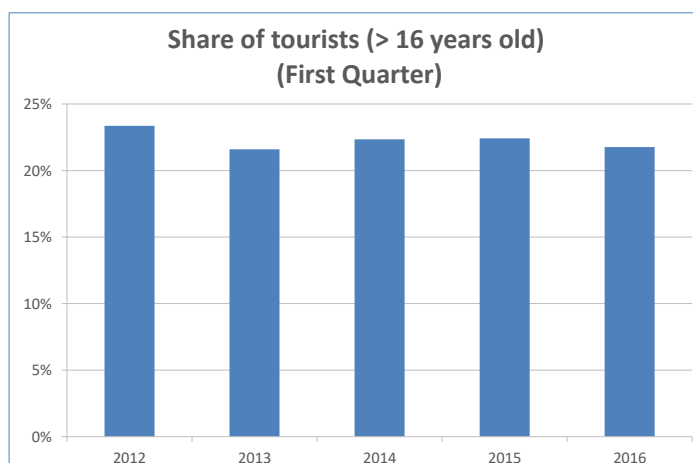
\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	74.4%	70.7%	71.2%	70.5%	74.4%
Recommendation by friends or relatives	28.6%	27.7%	27.5%	26.9%	27.1%
The Canary Islands television channel	0.5%	0.3%	0.3%	0.6%	0.8%
Other television or radio channels	0.5%	1.1%	1.2%	1.2%	1.5%
Information in the press/magazines/books	4.7%	4.7%	5.0%	5.3%	4.0%
Attendance at a tourism fair	0.4%	0.4%	0.3%	0.5%	0.5%
Tour Operator's brochure or catalogue	10.9%	9.8%	8.5%	7.8%	8.0%
Recommendation by Travel Agency	13.9%	13.6%	12.6%	13.8%	13.6%
Information obtained via the Internet	17.7%	19.6%	18.0%	18.4%	19.4%
Senior Tourism programme	0.1%	0.1%	0.1%	0.1%	0.1%
Others	5.1%	5.5%	6.8%	6.8%	5.4%

\* Multi-choice question



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.