

# Tourist profile trend (2017)

## Germany: First Quarter

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	591,643	657,319	672,698	736,792	720,709
Average daily expenditure (€)	132.06	130.97	129.94	140.75	143.69
. in their place of residence	101.51	101.69	100.74	110.62	113.38
. in the Canary Islands	30.55	29.28	29.20	30.13	30.30
Average length of stay	11.67	12.10	11.89	11.53	10.92
Turnover per tourist (€)	1,340	1,370	1,334	1,404	1,384
Total turnover (> 16 years old) (€m)	793	901	897	1,034	998
Share of total turnover	29.3%	31.1%	30.2%	29.0%	--
Share of total tourist	27.2%	28.1%	28.7%	27.0%	--

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

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation (**):</b>	41.44	39.09	42.39	49.34	52.18
- Accommodation	35.87	34.01	34.88	42.05	42.96
- Additional accommodation expenses	5.57	5.09	7.51	7.29	9.22
<b>Transport:</b>	33.85	31.29	33.55	31.16	28.24
- Public transport	5.14	4.84	5.21	4.53	4.44
- Taxi	5.29	5.39	4.78	4.39	4.36
- Car rental	23.42	21.06	23.56	22.24	19.44
<b>Food and drink:</b>	133.95	141.74	143.14	143.08	126.65
- Food purchases at supermarkets	59.59	66.91	69.72	65.40	53.99
- Restaurants	74.36	74.83	73.42	77.69	72.66
<b>Souvenirs:</b>	64.63	68.97	62.25	53.95	54.62
<b>Leisure:</b>	41.91	36.71	37.28	34.20	30.07
- Organized excursions	17.96	18.58	16.28	15.74	13.73
- Leisure, amusement	4.99	4.71	2.95	3.66	3.12
- Trip to other islands	2.01	1.40	1.76	1.45	2.19
- Sporting activities	9.85	7.20	9.49	9.86	6.20
- Cultural activities	1.88	1.89	2.41	2.00	1.76
- Discos and disco-pubs	5.21	2.92	4.40	1.49	3.06
<b>Others:</b>	21.65	16.42	19.87	21.82	17.15
- Wellness	5.98	5.51	3.15	5.65	4.35
- Medical expenses	2.80	2.89	4.65	2.31	3.26
- Other expenses	12.87	8.02	12.07	13.87	9.54

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.4%	0.3%	0.3%	0.5%	0.3%
Between 2 and 7 days	5.8%	4.8%	4.9%	4.0%	4.7%
Between 8 and 15 days	9.2%	8.7%	8.1%	7.9%	6.0%
Between 16 and 30 days	18.2%	17.6%	17.5%	14.4%	15.6%
Between 31 and 90 days	34.2%	31.9%	32.9%	36.1%	35.9%
More than 90 days	32.3%	36.6%	36.3%	37.2%	37.4%

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



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	6.2%	7.8%	7.8%	5.4%	7.6%
Flight and accommodation (room only)	15.7%	15.1%	15.5%	16.0%	15.9%
Flight and accommodation (B&B)	5.4%	6.3%	5.9%	5.9%	6.5%
Flight and accommodation (half board)	32.8%	30.2%	29.5%	32.1%	29.1%
Flight and accommodation (full board)	5.4%	5.7%	5.0%	5.0%	4.6%
Flight and accommodation (all inclusive)	34.6%	35.0%	36.3%	35.6%	36.3%
<b>% Tourists using low-cost airlines</b>	16.1%	20.5%	24.9%	28.1%	36.1%
<b>Other expenses in their place of residence:</b>					
- Car rental	15.3%	15.9%	18.1%	17.1%	18.8%
- Sporting activities	10.2%	9.5%	10.9%	9.9%	8.3%
- Excursions	6.9%	9.3%	9.7%	8.9%	8.2%
- Trip to other islands	3.4%	9.3%	7.5%	5.2%	3.6%

### How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	41.4%	42.9%	39.7%	41.8%	39.6%
- Tour Operator's website	63.0%	60.1%	61.9%	60.9%	61.5%
<b>Accommodation</b>	6.5%	6.5%	7.5%	6.2%	9.0%
- Accommodation's website	71.6%	73.5%	75.7%	71.9%	76.8%
<b>Travel agency (High street)</b>	33.4%	31.6%	30.2%	32.4%	28.9%
<b>Online Travel Agency (OTA)</b>	14.9%	13.6%	17.1%	16.5%	18.0%
<b>No need to book accommodation</b>	3.8%	5.4%	5.5%	3.1%	4.6%

### Flight booking

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Tour Operator</b>	43.4%	42.8%	40.8%	42.7%	40.9%
- Tour Operator's website	58.5%	58.1%	56.8%	56.0%	56.0%
<b>Airline</b>	10.6%	13.5%	14.9%	11.6%	15.4%
- Airline's website	94.5%	90.5%	95.2%	92.9%	96.3%
<b>Travel agency (High street)</b>	32.0%	29.3%	28.2%	30.0%	26.8%
<b>Online Travel Agency (OTA)</b>	14.0%	14.4%	16.2%	15.6%	16.9%

### Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	5.0%	5.3%	3.1%	5.3%	5.1%
4* Hotel	43.1%	42.1%	42.7%	44.1%	43.4%
1-2-3* Hotel	17.5%	15.6%	16.8%	16.8%	15.1%
Apartment	25.1%	22.2%	23.2%	24.0%	23.9%
Property (privately-owned, friends, family)	3.2%	4.4%	4.4%	2.8%	3.7%
Others	6.1%	10.4%	9.9%	7.0%	8.6%

### Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Gender</b>					
Percentage of men	49.5%	51.3%	51.0%	50.6%	50.2%
Percentage of women	50.5%	48.7%	49.0%	49.4%	49.8%

### Age

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Average age (tourists > 16 years old)	48.6	50.0	49.4	51.2	51.8
Standard deviation	14.7	14.8	15.3	15.4	16.0

### Age range (> 16 years old)

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
16-24 years old	5.1%	5.2%	6.2%	5.0%	5.5%
25-30 years old	8.6%	7.9%	8.6%	6.8%	7.6%
31-45 years old	29.3%	23.5%	23.3%	23.5%	18.9%
46-60 years old	33.2%	36.3%	36.4%	34.4%	35.9%
Over 60 years old	23.8%	27.2%	25.5%	30.3%	32.1%

### Occupation

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Business owner or self-employed	18.8%	19.2%	16.0%	17.2%	18.2%
Upper/Middle management employee	44.7%	43.5%	45.8%	43.0%	40.4%
Auxiliary level employee	9.2%	9.6%	9.8%	8.9%	8.1%
Students	4.8%	4.3%	5.1%	5.0%	5.9%
Retired	20.4%	22.0%	22.0%	24.3%	25.5%
Unemployed / unpaid dom. work	2.1%	1.5%	1.2%	1.6%	1.9%

### Annual household income level

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
€12,000 - €24,000	16.0%	13.8%	15.3%	13.2%	14.1%
€24,001 - €36,000	17.2%	16.3%	17.1%	17.4%	16.0%
€36,001 - €48,000	18.9%	18.2%	18.2%	17.0%	16.1%
€48,001 - €60,000	16.3%	17.1%	16.6%	15.1%	15.3%
€60,001 - €72,000	10.0%	9.5%	8.5%	11.1%	11.0%
€72,001 - €84,000	6.4%	6.0%	5.6%	6.2%	7.5%
More than €84,000	15.2%	19.1%	18.6%	19.9%	20.0%

(\*) 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.

## Tourist profile trend (2017)

### Germany: First Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	68,842	69,337	71,353	77,865	78,312
- Fuerteventura	159,836	165,972	175,214	195,204	187,805
- Gran Canaria	162,859	215,823	210,313	232,375	224,648
- Tenerife	174,974	172,854	181,653	187,761	182,236
- La Palma	15,336	17,279	17,834	26,559	29,511

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	11.8%	10.8%	10.9%	10.8%	11.1%
- Fuerteventura	27.5%	25.9%	26.7%	27.1%	26.7%
- Gran Canaria	28.0%	33.7%	32.0%	32.3%	32.0%
- Tenerife	30.1%	27.0%	27.7%	26.1%	25.9%
- La Palma	2.6%	2.7%	2.7%	3.7%	4.2%

#### Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	11.1%	11.5%	11.9%	10.9%	10.8%
Only with partner	56.5%	59.4%	59.5%	57.0%	58.2%
Only with children (under the age of 13)	1.6%	1.2%	0.6%	1.1%	0.9%
Partner + children (under the age of 13)	9.7%	7.2%	5.8%	8.3%	7.5%
Other relatives	5.0%	3.4%	5.0%	4.0%	4.3%
Friends	4.4%	5.6%	5.8%	5.8%	5.4%
Work colleagues	0.4%	0.1%	0.2%	0.3%	0.3%
Other combinations <sup>(1)</sup>	11.4%	11.5%	11.2%	12.6%	12.6%

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

#### How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	92.8%	92.9%	89.6%	93.8%	92.7%
Average rating (scale 1-10)	8.63	8.63	8.45	8.72	8.66

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

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	82.1%	82.5%	81.9%	85.2%	83.7%
In love (at least 10 previous visits)	20.2%	19.0%	20.0%	20.8%	21.1%

#### Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Germany	96.6%	94.9%	94.7%	94.3%	93.7%
Spanish Mainland	1.7%	2.7%	2.4%	2.1%	2.9%
Switzerland	0.6%	0.9%	1.7%	2.1%	2.6%
United Kingdom	0.1%	0.1%	0.0%	0.2%	0.2%
Austria	0.8%	0.3%	0.4%	0.3%	0.1%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
Netherlands	0.0%	0.1%	0.1%	0.1%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%
Belgium	0.0%	0.1%	0.0%	0.3%	0.0%
France	0.0%	0.1%	0.1%	0.0%	0.0%



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



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	95.4%	95.1%	93.1%	94.8%	94.7%
Tranquillity/rest/relaxation	45.7%	43.3%	42.5%	42.0%	41.0%
Beaches	39.3%	36.3%	35.7%	39.3%	37.7%
Scenery	33.8%	35.4%	37.8%	35.5%	36.8%
Security	5.6%	6.6%	7.0%	12.7%	14.5%
Visiting new places	11.7%	13.8%	11.8%	11.2%	12.1%
Active tourism	7.7%	8.6%	10.3%	9.4%	9.6%
Ease of travel	8.3%	9.8%	7.5%	7.4%	7.7%
Quality of the environment	3.0%	3.4%	4.2%	4.1%	4.4%
Price	5.0%	4.3%	4.5%	4.4%	4.0%
Suitable destination for children	4.9%	4.1%	3.0%	4.2%	3.8%
Nautical activities	2.6%	3.5%	2.6%	2.7%	3.0%
Culture	1.8%	1.7%	2.2%	1.6%	2.3%
Golf	1.7%	1.5%	1.5%	1.7%	1.9%
Rural tourism	1.8%	1.6%	1.3%	1.5%	1.4%
Shopping	1.1%	1.3%	1.9%	0.9%	0.7%

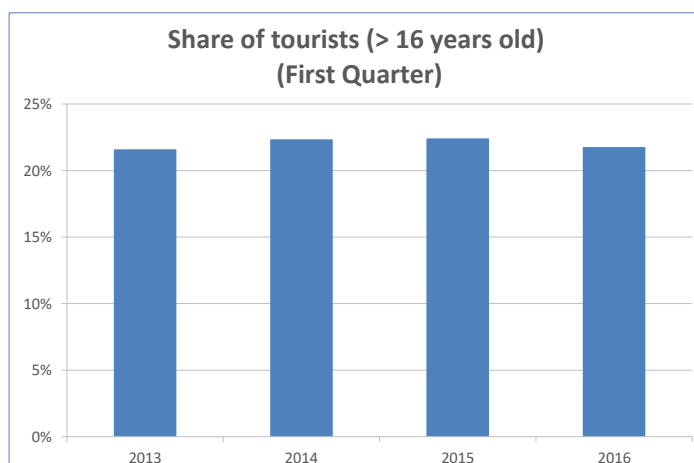
\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	70.7%	71.2%	70.5%	74.4%	70.9%
Recommendation by friends or relatives	27.7%	27.5%	26.9%	27.1%	29.9%
The Canary Islands television channel	0.3%	0.3%	0.6%	0.8%	0.7%
Other television or radio channels	1.1%	1.2%	1.2%	1.5%	1.4%
Information in the press/magazines/books	4.7%	5.0%	5.3%	4.0%	3.9%
Attendance at a tourism fair	0.4%	0.3%	0.5%	0.5%	0.3%
Tour Operator's brochure or catalogue	9.8%	8.5%	7.8%	8.0%	6.8%
Recommendation by Travel Agency	13.6%	12.6%	13.8%	13.6%	11.6%
Information obtained via the Internet	19.6%	18.0%	18.4%	19.4%	20.4%
Senior Tourism programme	0.1%	0.1%	0.1%	0.1%	0.0%
Others	5.5%	6.8%	6.8%	5.4%	7.1%

\* 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.