

Tourist profile trend (2016)

Germany: Second Quarter

How many are they and how much do they spend?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tourist arrivals (> 16 years old)	459,587	433,937	503,938	499,429	630,853
Average daily expenditure (€)	118.93	117.60	121.13	126.27	122.36
. in their place of residence	92.36	89.80	93.99	98.04	94.19
. in the Canary Islands	26.57	27.80	27.14	28.23	28.17
Average length of stay	10.45	11.85	10.18	10.38	10.92
Turnover per tourist (€)	1,130	1,195	1,144	1,171	1,181
Total turnover (> 16 years old) (€m)	519	518	577	585	745
Share of total turnover	19.0%	19.2%	19.9%	19.7%	20.9%
Share of total tourist	20.9%	19.9%	21.6%	21.3%	23.1%

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

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Accommodation (**):	22.59	30.47	30.22	32.67	32.19
- Accommodation	16.69	25.34	24.56	26.58	24.70
- Additional accommodation expenses	5.90	5.13	5.66	6.09	7.49
Transport:	25.69	27.35	23.93	24.78	23.86
- Public transport	3.78	4.68	3.43	3.54	3.76
- Taxi	4.20	4.61	2.86	4.50	3.75
- Car rental	17.71	18.05	17.64	16.73	16.34
Food and drink:	94.43	126.01	101.87	109.18	114.12
- Food purchases at supermarkets	42.35	59.86	45.90	51.18	52.50
- Restaurants	52.09	66.15	55.97	58.00	61.61
Souvenirs:	54.85	64.59	56.72	58.95	64.73
Leisure:	43.76	40.94	36.70	49.40	38.78
- Organized excursions	20.37	21.38	17.13	16.89	19.19
- Leisure, amusement	6.21	5.22	4.36	5.66	5.05
- Trip to other islands	1.73	4.12	2.73	10.24	3.05
- Sporting activities	6.84	5.29	7.96	11.17	6.12
- Cultural activities	2.10	1.87	2.67	1.90	2.17
- Discos and disco-pubs	6.51	3.06	1.85	3.54	3.19
Others:	28.24	26.51	13.88	28.33	15.66
- Wellness	6.46	6.15	4.76	3.10	3.95
- Medical expenses	2.57	4.58	1.88	14.21	3.37
- Other expenses	19.21	15.78	7.24	11.02	8.34

How far in advance do they book their trip?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
The same day they leave	0.4%	0.3%	0.3%	0.7%	0.2%
Between 2 and 7 days	9.3%	8.6%	7.6%	6.0%	5.2%
Between 8 and 15 days	11.4%	10.3%	8.8%	6.9%	5.1%
Between 16 and 30 days	14.7%	17.9%	15.3%	13.7%	13.1%
Between 31 and 90 days	31.5%	31.6%	29.9%	36.6%	36.9%
More than 90 days	32.7%	31.4%	38.0%	36.2%	39.5%

What do they book at their place of residence?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight only	5.1%	8.2%	4.0%	5.7%	4.5%
Flight and accommodation (room only)	11.0%	12.3%	12.3%	10.3%	11.3%
Flight and accommodation (B&B)	2.8%	4.9%	4.1%	5.9%	3.9%
Flight and accommodation (half board)	35.8%	32.4%	34.4%	32.9%	33.7%
Flight and accommodation (full board)	3.4%	3.4%	3.9%	3.8%	4.6%
Flight and accommodation (all inclusive)	41.9%	38.8%	41.3%	41.5%	42.0%
% Tourists using low-cost airlines	15.3%	15.3%	22.3%	27.1%	28.3%
Other expenses in their place of residence:					
- Car rental	13.1%	13.8%	14.5%	13.6%	14.0%
- Sporting activities	10.3%	9.2%	9.6%	10.6%	7.8%
- Excursions	5.8%	7.1%	8.2%	8.1%	9.6%
- Trip to other islands	1.2%	1.3%	2.7%	2.8%	3.2%

How do they book?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Accommodation booking					
Tour Operator	46.2%	36.9%	42.2%	38.4%	41.0%
- Tour Operator's website	58.2%	61.4%	61.2%	60.7%	62.2%
Accommodation	4.4%	5.4%	5.7%	5.6%	4.8%
- Accommodation's website	78.1%	71.1%	78.2%	71.9%	72.9%
Travel agency (High street)	32.4%	36.7%	34.4%	36.0%	34.1%
Online Travel Agency (OTA)	13.5%	14.7%	14.9%	16.1%	17.2%
No need to book accommodation	3.5%	6.3%	2.8%	3.9%	2.9%

Flight booking

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tour Operator	53.3%	38.8%	42.9%	40.6%	43.3%
- Tour Operator's website	54.8%	57.0%	56.0%	55.1%	59.5%
Airline	7.1%	9.8%	9.9%	10.3%	8.5%
- Airline's website	89.8%	90.9%	94.1%	89.6%	91.3%
Travel agency (High street)	26.1%	34.9%	32.2%	33.2%	32.0%
Online Travel Agency (OTA)	13.6%	16.5%	14.9%	15.8%	16.1%

Where do they stay?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
5* Hotel	5.6%	5.7%	4.3%	5.3%	4.6%
4* Hotel	48.1%	47.9%	50.1%	50.4%	52.5%
1-2-3* Hotel	21.7%	19.6%	20.1%	18.2%	18.0%
Apartment	20.0%	20.2%	21.2%	20.2%	18.6%
Property (privately-owned, friends, family)	3.2%	5.3%	2.2%	3.2%	2.4%
Others	1.4%	1.3%	2.2%	2.7%	3.9%

Who are they?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Gender					
Percentage of men	48.6%	47.4%	49.8%	48.8%	48.1%
Percentage of women	51.4%	52.6%	50.2%	51.2%	51.9%
Age					
Average age (tourists > 16 years old)	44.6	45.9	45.0	45.1	48.7
Standard deviation	14.1	15.9	14.7	15.2	16.2
Age range (> 16 years old)					
16-24 years old	9.1%	8.8%	7.7%	8.9%	6.8%
25-30 years old	12.2%	14.2%	13.8%	15.1%	13.8%
31-45 years old	29.7%	26.1%	28.4%	25.0%	19.4%
46-60 years old	35.1%	30.6%	35.3%	34.2%	34.0%
Over 60 years old	13.9%	20.4%	14.8%	16.8%	26.0%
Occupation					
Business owner or self-employed	13.3%	13.2%	12.8%	13.7%	11.3%
Upper/Middle management employee	56.7%	48.9%	54.3%	50.2%	47.4%
Auxiliary level employee	11.6%	12.5%	11.8%	13.1%	12.2%
Students	5.0%	6.3%	4.6%	6.6%	4.5%
Retired	11.1%	17.2%	13.4%	14.8%	22.7%
Unemployed / unpaid dom. work	2.3%	2.0%	3.1%	1.7%	1.9%
Annual household income level					
€12,000 - €24,000	12.0%	18.8%	14.9%	13.6%	15.7%
€24,001 - €36,000	17.8%	20.3%	17.9%	15.0%	20.0%
€36,001 - €48,000	18.3%	18.0%	19.8%	18.3%	18.7%
€48,001 - €60,000	18.3%	14.2%	15.5%	17.7%	18.1%
€60,001 - €72,000	10.7%	8.8%	9.8%	11.4%	10.1%
€72,001 - €84,000	6.6%	5.8%	6.6%	7.4%	5.1%
More than €84,000	16.4%	14.2%	15.5%	16.7%	12.4%

(*) 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: Second Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	49,295	45,094	58,310	51,946	68,150
- Fuerteventura	141,730	142,503	180,392	162,477	197,463
- Gran Canaria	138,777	121,405	132,335	146,206	183,040
- Tenerife	113,985	110,361	116,340	116,607	157,671
- La Palma	9,098	7,082	9,553	11,125	15,874

Share (%)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	10.9%	10.6%	11.7%	10.6%	11.0%
- Fuerteventura	31.3%	33.4%	36.3%	33.3%	31.7%
- Gran Canaria	30.6%	28.5%	26.6%	29.9%	29.4%
- Tenerife	25.2%	25.9%	23.4%	23.9%	25.3%
- La Palma	2.0%	1.7%	1.9%	2.3%	2.6%

Who do they come with?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Unaccompanied	7.3%	13.1%	10.6%	8.5%	9.6%
Only with partner	58.1%	56.9%	54.9%	58.1%	67.4%
Only with children (under the age of 13)	1.4%	1.7%	1.5%	0.9%	0.1%
Partner + children (under the age of 13)	10.1%	7.4%	9.6%	8.1%	4.9%
Other relatives	4.8%	4.9%	4.8%	6.8%	3.9%
Friends	4.8%	5.7%	4.5%	5.1%	6.7%
Work colleagues	0.5%	0.4%	0.5%	0.5%	0.1%
Other combinations ⁽¹⁾	13.1%	10.0%	13.7%	11.8%	7.3%

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

How do they rate the destination?



Impression of their stay	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Good or very good (% tourists)	92.3%	91.2%	93.1%	93.5%	94.9%
Average rating (scale 1-10)	8.59	8.54	8.70	8.71	8.71

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Repeat tourists	78.0%	77.2%	75.4%	76.1%	77.5%
In love (at least 10 previous visits)	16.3%	18.5%	13.1%	17.4%	16.5%

Where does the flight come from?



Ten main origin countries	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Germany	94.6%	96.2%	94.0%	93.6%	94.5%
Spanish Mainland	3.0%	2.4%	3.2%	2.4%	2.4%
Switzerland	1.3%	0.5%	1.7%	1.8%	2.4%
Austria	0.3%	0.4%	0.1%	0.3%	0.1%
Belgium	0.3%	0.1%	0.0%	0.3%	0.1%
United Kingdom	0.1%	0.0%	0.2%	0.2%	0.1%
Finland	0.0%	0.0%	0.0%	0.1%	0.0%
France	0.0%	0.0%	0.0%	0.1%	0.0%
Netherlands	0.1%	0.0%	0.2%	0.3%	0.0%
Italy	0.1%	0.0%	0.1%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Climate/sun	95.1%	94.4%	93.8%	93.5%	93.0%
Beaches	47.6%	46.7%	48.0%	48.8%	46.0%
Tranquillity/rest/relaxation	53.4%	51.6%	48.0%	47.2%	42.6%
Scenery	28.6%	29.9%	28.0%	28.9%	29.3%
Security	5.1%	4.8%	5.9%	7.4%	17.3%
Visiting new places	12.8%	12.7%	13.7%	13.2%	15.1%
Active tourism	6.5%	6.1%	6.6%	7.7%	6.3%
Price	6.1%	5.5%	7.3%	5.2%	5.5%
Ease of travel	5.9%	6.5%	5.2%	5.5%	4.9%
Quality of the environment	2.5%	2.4%	3.1%	3.7%	3.7%
Nautical activities	3.0%	3.7%	4.6%	3.1%	2.4%
Suitable destination for children	5.6%	4.6%	5.6%	4.3%	2.4%
Culture	1.8%	2.1%	1.8%	2.0%	2.4%
Shopping	1.5%	1.1%	1.9%	1.1%	1.9%
Nightlife/fun	1.8%	1.9%	1.5%	1.1%	1.8%
Theme parks	3.9%	2.1%	1.5%	2.3%	1.6%

* Multi-choice question

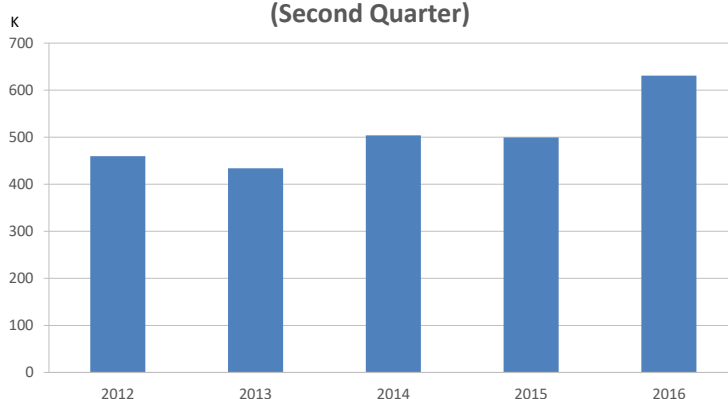
What did motivate them to come?



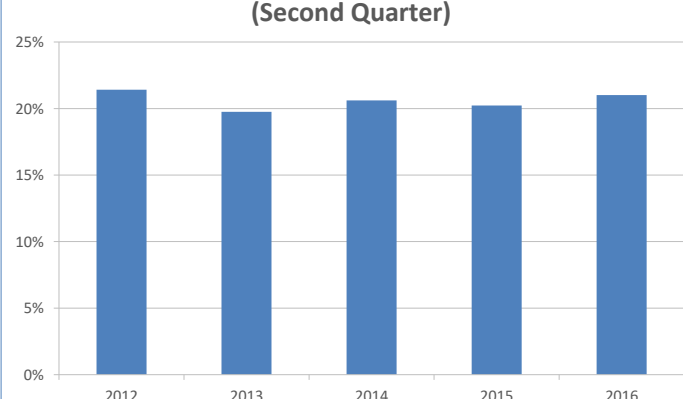
Aspects motivating the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Previous visits to the Canary Islands	66.4%	66.1%	62.1%	63.7%	64.7%
Recommendation by friends or relatives	31.2%	30.5%	32.0%	30.2%	31.3%
The Canary Islands television channel	0.3%	0.7%	0.4%	0.6%	0.5%
Other television or radio channels	1.5%	0.7%	1.1%	0.8%	2.1%
Information in the press/magazines/books	5.4%	4.4%	4.6%	4.0%	4.5%
Attendance at a tourism fair	0.5%	0.2%	0.3%	0.5%	0.6%
Tour Operator's brochure or catalogue	12.6%	8.8%	11.4%	9.4%	9.8%
Recommendation by Travel Agency	19.1%	18.5%	16.5%	17.8%	16.3%
Information obtained via the Internet	20.2%	20.7%	22.9%	21.5%	24.2%
Senior Tourism programme	0.0%	0.0%	0.2%	0.2%	0.1%
Others	4.0%	5.0%	3.9%	5.0%	4.5%

* Multi-choice question

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



Share of tourists (> 16 years old)
(Second 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.