

Tourist profile trend (2017)

Germany: Second Quarter

How many are they and how much do they spend?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	433,937	503,938	499,429	630,853	645,674
Average daily expenditure (€)	117.60	121.13	126.27	122.36	133.24
. in their place of residence	89.80	93.99	98.04	94.19	102.50
. in the Canary Islands	27.80	27.14	28.23	28.17	30.74
Average length of stay	11.85	10.18	10.38	10.92	10.51
Turnover per tourist (€)	1,195	1,144	1,171	1,181	1,257
Total turnover (> 16 years old) (€m)	518	577	585	745	812
Share of total turnover	19.2%	19.9%	19.7%	20.9%	--
Share of total tourist	19.9%	21.6%	21.3%	23.1%	--

Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	30.47	30.22	32.67	32.19	40.20
- Accommodation	25.34	24.56	26.58	24.70	33.87
- Additional accommodation expenses	5.13	5.66	6.09	7.49	6.34
Transport:	27.35	23.93	24.78	23.86	25.24
- Public transport	4.68	3.43	3.54	3.76	2.50
- Taxi	4.61	2.86	4.50	3.75	3.30
- Car rental	18.05	17.64	16.73	16.34	19.44
Food and drink:	126.01	101.87	109.18	114.12	129.81
- Food purchases at supermarkets	59.86	45.90	51.18	52.50	49.45
- Restaurants	66.15	55.97	58.00	61.61	80.36
Souvenirs:	64.59	56.72	58.95	64.73	55.71
Leisure:	40.94	36.70	49.40	38.78	33.99
- Organized excursions	21.38	17.13	16.89	19.19	17.43
- Leisure, amusement	5.22	4.36	5.66	5.05	4.58
- Trip to other islands	4.12	2.73	10.24	3.05	1.04
- Sporting activities	5.29	7.96	11.17	6.12	5.73
- Cultural activities	1.87	2.67	1.90	2.17	1.91
- Discos and disco-pubs	3.06	1.85	3.54	3.19	3.30
Others:	26.51	13.88	28.33	15.66	20.63
- Wellness	6.15	4.76	3.10	3.95	3.97
- Medical expenses	4.58	1.88	14.21	3.37	2.36
- Other expenses	15.78	7.24	11.02	8.34	14.30

How far in advance do they book their trip?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.3%	0.3%	0.7%	0.2%	0.1%
Between 2 and 7 days	8.6%	7.6%	6.0%	5.2%	5.0%
Between 8 and 15 days	10.3%	8.8%	6.9%	5.1%	5.0%
Between 16 and 30 days	17.9%	15.3%	13.7%	13.1%	11.4%
Between 31 and 90 days	31.6%	29.9%	36.6%	36.9%	35.4%
More than 90 days	31.4%	38.0%	36.2%	39.5%	43.1%

What do they book at their place of residence?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	8.2%	4.0%	5.7%	4.5%	5.4%
Flight and accommodation (room only)	12.3%	12.3%	10.3%	11.3%	13.9%
Flight and accommodation (B&B)	4.9%	4.1%	5.9%	3.9%	5.0%
Flight and accommodation (half board)	32.4%	34.4%	32.9%	33.7%	31.5%
Flight and accommodation (full board)	3.4%	3.9%	3.8%	4.6%	4.0%
Flight and accommodation (all inclusive)	38.8%	41.3%	41.5%	42.0%	40.1%
% Tourists using low-cost airlines	15.3%	22.3%	27.1%	28.3%	30.6%
Other expenses in their place of residence:					
- Car rental	13.8%	14.5%	13.6%	14.0%	16.3%
- Sporting activities	9.2%	9.6%	10.6%	7.8%	7.6%
- Excursions	7.1%	8.2%	8.1%	9.6%	9.5%
- Trip to other islands	1.3%	2.7%	2.8%	3.2%	2.3%

How do they book?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation booking					
Tour Operator	36.9%	42.2%	38.4%	41.0%	42.1%
- Tour Operator's website	61.4%	61.2%	60.7%	62.2%	69.3%
Accommodation	5.4%	5.7%	5.6%	4.8%	4.8%
- Accommodation's website	71.1%	78.2%	71.9%	72.9%	80.9%
Travel agency (High street)	36.7%	34.4%	36.0%	34.1%	31.0%
Online Travel Agency (OTA)	14.7%	14.9%	16.1%	17.2%	17.6%
No need to book accommodation	6.3%	2.8%	3.9%	2.9%	4.4%

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight booking					
Tour Operator	38.8%	42.9%	40.6%	43.3%	42.3%
- Tour Operator's website	57.0%	56.0%	55.1%	59.5%	63.1%
Airline	9.8%	9.9%	10.3%	8.5%	9.3%
- Airline's website	90.9%	94.1%	89.6%	91.3%	93.5%
Travel agency (High street)	34.9%	32.2%	33.2%	32.0%	29.7%
Online Travel Agency (OTA)	16.5%	14.9%	15.8%	16.1%	18.7%

Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	5.7%	4.3%	5.3%	4.6%	4.9%
4* Hotel	47.9%	50.1%	50.4%	52.5%	47.6%
1-2-3* Hotel	19.6%	20.1%	18.2%	18.0%	17.2%
Apartment	20.2%	21.2%	20.2%	18.6%	22.5%
Property (privately-owned, friends, family)	5.3%	2.2%	3.2%	2.4%	3.3%
Others	1.3%	2.2%	2.7%	3.9%	4.5%

Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Gender					
Percentage of men	47.4%	49.8%	48.8%	48.1%	49.6%
Percentage of women	52.6%	50.2%	51.2%	51.9%	50.4%

Age					
Average age (tourists > 16 years old)	45.9	45.0	45.1	48.7	49.2
Standard deviation	15.9	14.7	15.2	16.2	16.0

Age range (> 16 years old)					
16-24 years old	8.8%	7.7%	8.9%	6.8%	7.0%
25-30 years old	14.2%	13.8%	15.1%	13.8%	11.0%
31-45 years old	26.1%	28.4%	25.0%	19.4%	19.8%
46-60 years old	30.6%	35.3%	34.2%	34.0%	35.0%
Over 60 years old	20.4%	14.8%	16.8%	26.0%	27.3%

Occupation					
Business owner or self-employed	13.2%	12.8%	13.7%	11.3%	11.9%
Upper/Middle management employee	48.9%	54.3%	50.2%	47.4%	49.0%
Auxiliary level employee	12.5%	11.8%	13.1%	12.2%	11.3%
Students	6.3%	4.6%	6.6%	4.5%	4.0%
Retired	17.2%	13.4%	14.8%	22.7%	22.5%
Unemployed / unpaid dom. work	2.0%	3.1%	1.7%	1.9%	1.3%

Annual household income level					
€12,000 - €24,000	18.8%	14.9%	13.6%	15.7%	13.8%
€24,001 - €36,000	20.3%	17.9%	15.0%	20.0%	18.0%
€36,001 - €48,000	18.0%	19.8%	18.3%	18.7%	17.0%
€48,001 - €60,000	14.2%	15.5%	17.7%	18.1%	18.0%
€60,001 - €72,000	8.8%	9.8%	11.4%	10.1%	10.6%
€72,001 - €84,000	5.8%	6.6%	7.4%	5.1%	7.5%
More than €84,000	14.2%	15.5%	16.7%	12.4%	15.2%

(*) 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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Germany: Second Quarter

Which island do they choose?



Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	45,094	58,310	51,946	68,150	68,712
- Fuerteventura	142,503	180,392	162,477	197,463	189,267
- Gran Canaria	121,405	132,335	146,206	183,040	200,555
- Tenerife	110,361	116,340	116,607	157,671	157,694
- La Palma	7,082	9,553	11,125	15,874	19,478

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	10.6%	11.7%	10.6%	11.0%	10.8%
- Fuerteventura	33.4%	36.3%	33.3%	31.7%	29.8%
- Gran Canaria	28.5%	26.6%	29.9%	29.4%	31.5%
- Tenerife	25.9%	23.4%	23.9%	25.3%	24.8%
- La Palma	1.7%	1.9%	2.3%	2.6%	3.1%

Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	13.1%	10.6%	8.5%	9.6%	9.7%
Only with partner	56.9%	54.9%	58.1%	67.4%	64.0%
Only with children (under the age of 13)	1.7%	1.5%	0.9%	0.1%	0.5%
Partner + children (under the age of 13)	7.4%	9.6%	8.1%	4.9%	5.3%
Other relatives	4.9%	4.8%	6.8%	3.9%	4.2%
Friends	5.7%	4.5%	5.1%	6.7%	6.2%
Work colleagues	0.4%	0.5%	0.5%	0.1%	0.1%
Other combinations ⁽¹⁾	10.0%	13.7%	11.8%	7.3%	10.0%

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

How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	91.2%	93.1%	93.5%	94.9%	94.0%
Average rating (scale 1-10)	8.54	8.70	8.71	8.71	8.84

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	77.2%	75.4%	76.1%	77.5%	79.2%
In love (at least 10 previous visits)	18.5%	13.1%	17.4%	16.5%	20.8%

Where does the flight come from?



Ten main origin markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Germany	96.2%	94.0%	93.6%	94.5%	94.7%
Spanish Mainland	2.4%	3.2%	2.4%	2.4%	2.6%
Switzerland	0.5%	1.7%	1.8%	2.4%	1.7%
Belgium	0.1%	0.0%	0.3%	0.1%	0.3%
Austria	0.4%	0.1%	0.3%	0.1%	0.1%
Poland	0.0%	0.0%	0.0%	0.0%	0.1%
Netherlands	0.0%	0.2%	0.3%	0.0%	0.1%
United Kingdom	0.0%	0.2%	0.2%	0.1%	0.1%
Finland	0.0%	0.0%	0.1%	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	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	94.4%	93.8%	93.5%	93.0%	93.7%
Beaches	46.7%	48.0%	48.8%	46.0%	48.0%
Tranquillity/rest/relaxation	51.6%	48.0%	47.2%	42.6%	45.7%
Scenery	29.9%	28.0%	28.9%	29.3%	32.2%
Security	4.8%	5.9%	7.4%	17.3%	13.9%
Visiting new places	12.7%	13.7%	13.2%	15.1%	12.2%
Active tourism	6.1%	6.6%	7.7%	6.3%	5.9%
Price	5.5%	7.3%	5.2%	5.5%	5.1%
Ease of travel	6.5%	5.2%	5.5%	4.9%	5.0%
Quality of the environment	2.4%	3.1%	3.7%	3.7%	3.4%
Suitable destination for children	4.6%	5.6%	4.3%	2.4%	3.3%
Nautical activities	3.7%	4.6%	3.1%	2.4%	2.9%
Theme parks	2.1%	1.5%	2.3%	1.6%	2.0%
Nightlife/fun	1.9%	1.5%	1.1%	1.8%	1.6%
Shopping	1.1%	1.9%	1.1%	1.9%	1.4%
Culture	2.1%	1.8%	2.0%	2.4%	1.4%

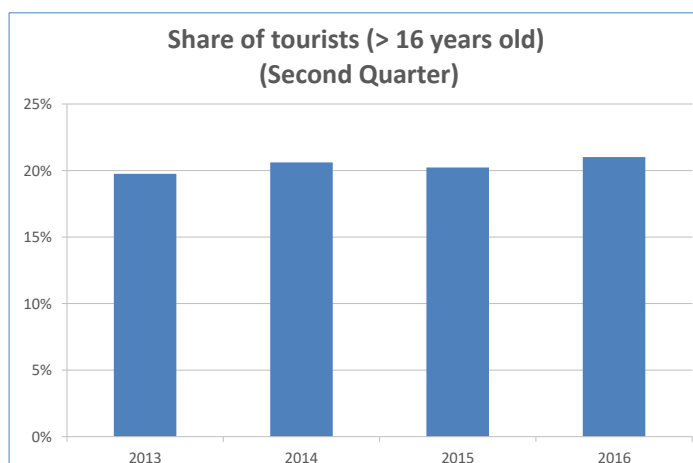
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	66.1%	62.1%	63.7%	64.7%	67.2%
Recommendation by friends or relatives	30.5%	32.0%	30.2%	31.3%	30.1%
The Canary Islands television channel	0.7%	0.4%	0.6%	0.5%	0.8%
Other television or radio channels	0.7%	1.1%	0.8%	2.1%	1.7%
Information in the press/magazines/books	4.4%	4.6%	4.0%	4.5%	4.1%
Attendance at a tourism fair	0.2%	0.3%	0.5%	0.6%	0.4%
Tour Operator's brochure or catalogue	8.8%	11.4%	9.4%	9.8%	7.0%
Recommendation by Travel Agency	18.5%	16.5%	17.8%	16.3%	16.1%
Information obtained via the Internet	20.7%	22.9%	21.5%	24.2%	24.1%
Senior Tourism programme	0.0%	0.2%	0.2%	0.1%	0.1%
Others	5.0%	3.9%	5.0%	4.5%	4.6%

* 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.