

# Tourist profile trend (2016)

## Germany: Third Quarter

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	497,377	472,311	526,595	493,995	591,310
Average daily expenditure (€)	120.64	121.13	121.21	124.60	129.31
. in their place of residence	94.29	95.67	95.51	98.59	102.73
. in the Canary Islands	26.34	25.46	25.70	26.01	26.58
Average length of stay	10.95	10.58	10.43	10.49	10.50
Turnover per tourist (€)	1,224	1,198	1,190	1,222	1,278
Total turnover (> 16 years old) (€m)	609	566	626	603	756
Share of total turnover	22.3%	20.9%	21.6%	20.3%	21.2%
Share of total tourist	22.6%	21.7%	22.5%	21.1%	21.7%

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

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation (**):</b>	25.68	24.29	23.62	28.41	28.67
- Accommodation	20.48	19.66	18.16	23.71	21.14
- Additional accommodation expenses	5.20	4.64	5.46	4.70	7.53
<b>Transport:</b>	26.62	23.78	20.68	24.06	22.25
- Public transport	3.08	2.65	2.45	3.23	3.69
- Taxi	4.85	4.50	3.74	3.44	3.37
- Car rental	18.69	16.63	14.49	17.38	15.19
<b>Food and drink:</b>	91.07	84.22	85.37	91.49	100.53
- Food purchases at supermarkets	42.66	40.22	39.07	43.50	43.17
- Restaurants	48.42	44.00	46.30	47.99	57.36
<b>Souvenirs:</b>	56.96	61.42	63.99	54.21	65.15
<b>Leisure:</b>	51.94	50.32	48.28	48.25	45.31
- Organized excursions	24.57	26.77	23.84	26.32	25.08
- Leisure, amusement	6.84	6.36	6.30	6.40	5.92
- Trip to other islands	2.37	1.97	2.92	1.55	2.18
- Sporting activities	8.57	8.17	8.40	8.93	7.17
- Cultural activities	2.01	2.57	2.27	2.12	2.48
- Discos and disco-pubs	7.57	4.47	4.55	2.93	2.47
<b>Others:</b>	22.39	16.46	16.66	12.98	11.86
- Wellness	3.39	3.45	2.84	3.31	3.22
- Medical expenses	1.75	1.15	1.48	1.51	1.22
- Other expenses	17.25	11.86	12.35	8.16	7.41

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.3%	0.2%	0.1%	0.3%	0.5%
Between 2 and 7 days	7.7%	6.4%	8.3%	4.9%	3.7%
Between 8 and 15 days	10.7%	11.9%	9.2%	9.7%	6.6%
Between 16 and 30 days	14.4%	14.8%	14.5%	16.0%	11.6%
Between 31 and 90 days	24.2%	26.6%	22.0%	24.4%	23.1%
More than 90 days	42.8%	40.1%	45.8%	44.7%	54.4%

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	5.5%	4.1%	4.2%	5.3%	5.1%
Flight and accommodation (room only)	9.0%	9.7%	8.9%	9.0%	9.9%
Flight and accommodation (B&B)	3.2%	3.3%	3.5%	3.6%	4.4%
Flight and accommodation (half board)	33.7%	33.6%	30.0%	31.0%	31.0%
Flight and accommodation (full board)	2.6%	2.7%	3.0%	2.5%	3.1%
Flight and accommodation (all inclusive)	46.0%	46.6%	50.5%	48.6%	46.5%
<b>% Tourists using low-cost airlines</b>	16.2%	17.1%	26.0%	24.6%	28.7%

### Other expenses in their place of residence:

- Car rental	10.7%	12.5%	11.5%	12.6%	13.0%
- Sporting activities	11.4%	11.2%	9.5%	10.1%	9.3%
- Excursions	8.0%	8.5%	8.9%	10.1%	9.2%
- Trip to other islands	1.1%	1.3%	1.5%	1.0%	1.8%

### How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	35.1%	35.9%	35.8%	36.9%	38.2%
- Tour Operator's website	51.4%	61.9%	61.3%	60.5%	58.8%
<b>Accommodation</b>	3.7%	4.4%	3.7%	4.1%	3.7%
- Accommodation's website	80.0%	78.3%	76.4%	71.9%	74.1%
<b>Travel agency (High street)</b>	42.1%	43.5%	42.6%	40.3%	39.6%
<b>Online Travel Agency (OTA)</b>	13.9%	12.9%	14.6%	14.7%	14.6%
<b>No need to book accommodation</b>	5.1%	3.5%	3.4%	4.0%	3.9%

### Flight booking

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Tour Operator</b>	37.8%	38.6%	37.6%	40.4%	39.3%
- Tour Operator's website	46.3%	52.0%	60.1%	52.9%	55.9%
<b>Airline</b>	8.4%	7.8%	8.2%	8.3%	7.7%
- Airline's website	90.0%	92.0%	89.6%	89.3%	86.4%
<b>Travel agency (High street)</b>	39.3%	40.1%	39.8%	37.1%	37.9%
<b>Online Travel Agency (OTA)</b>	14.5%	13.5%	14.4%	14.2%	15.0%

### Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	3.9%	4.8%	4.6%	4.2%	3.9%
4* Hotel	50.4%	50.4%	50.3%	54.0%	48.2%
1-2-3* Hotel	22.8%	21.3%	22.2%	18.3%	20.4%
Apartment	17.9%	19.7%	19.2%	18.9%	21.3%
Property (privately-owned, friends, family)	4.5%	3.1%	3.1%	3.8%	3.5%
Others	0.5%	0.7%	0.6%	0.8%	2.8%

### Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Gender</b>					
Percentage of men	48.7%	48.5%	50.2%	49.1%	49.7%
Percentage of women	51.3%	51.5%	49.8%	50.9%	50.3%

### Age

Average age (tourists > 16 years old)	37.7	37.5	38.0	38.3	41.1
Standard deviation	12.9	13.0	12.9	13.1	14.6

### Age range (> 16 years old)

16-24 years old	19.4%	19.1%	18.1%	18.1%	16.4%
25-30 years old	18.1%	20.7%	18.6%	18.1%	14.4%
31-45 years old	31.8%	29.3%	30.6%	30.2%	27.1%
46-60 years old	26.7%	27.5%	29.0%	29.0%	32.5%
Over 60 years old	4.0%	3.4%	3.7%	4.7%	9.7%

### Occupation

Business owner or self-employed	12.8%	11.0%	12.0%	9.8%	10.6%
Upper/Middle management employee	53.9%	58.2%	56.2%	55.1%	54.3%
Auxiliary level employee	16.5%	14.0%	17.0%	18.4%	16.2%
Students	12.1%	12.1%	10.7%	11.0%	10.5%
Retired	2.3%	2.7%	2.2%	3.7%	6.8%
Unemployed / unpaid dom. work	2.3%	1.9%	2.0%	2.0%	1.6%

### Annual household income level

€12,000 - €24,000	19.7%	19.1%	18.7%	17.2%	17.4%
€24,001 - €36,000	18.9%	19.8%	20.5%	18.8%	17.4%
€36,001 - €48,000	17.5%	16.0%	16.3%	17.2%	16.4%
€48,001 - €60,000	15.2%	15.8%	16.0%	16.7%	17.7%
€60,001 - €72,000	8.6%	8.8%	8.6%	9.5%	10.5%
€72,001 - €84,000	5.7%	7.0%	4.9%	5.0%	4.7%
More than €84,000	14.4%	13.5%	14.9%	15.5%	15.8%

(\*) 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: Third Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	54,581	51,912	57,804	53,320	63,320
- Fuerteventura	168,840	161,819	190,273	177,741	185,632
- Gran Canaria	137,586	128,288	139,720	131,279	176,687
- Tenerife	115,622	113,067	122,590	114,197	145,296
- La Palma	12,121	8,001	7,828	10,547	14,495

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	11.2%	11.2%	11.2%	10.9%	10.8%
- Fuerteventura	34.5%	34.9%	36.7%	36.5%	31.7%
- Gran Canaria	28.2%	27.7%	27.0%	27.0%	30.2%
- Tenerife	23.7%	24.4%	23.7%	23.4%	24.8%
- La Palma	2.5%	1.7%	1.5%	2.2%	2.5%

#### Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	7.1%	7.4%	7.5%	7.1%	6.3%
Only with partner	48.8%	47.7%	46.6%	48.5%	44.2%
Only with children (under the age of 13)	1.9%	2.4%	2.0%	1.5%	1.8%
Partner + children (under the age of 13)	13.0%	11.9%	15.4%	15.6%	14.5%
Other relatives	4.9%	5.7%	4.7%	5.2%	6.0%
Friends	5.3%	5.9%	5.4%	4.3%	4.6%
Work colleagues	0.3%	0.3%	0.2%	0.1%	0.0%
Other combinations <sup>(1)</sup>	18.8%	18.7%	18.3%	17.8%	22.6%

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

#### How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	91.4%	92.1%	93.3%	92.1%	93.5%
Average rating (scale 1-10)	8.56	8.65	8.69	8.66	8.74

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

Repeat tourists of the Canary Islands	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	65.2%	65.9%	68.0%	64.8%	66.7%
In love (at least 10 previous visits)	7.9%	10.0%	8.5%	10.1%	8.8%

#### Where does the flight come from?



Ten main origin countries	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Germany	93.1%	93.4%	92.4%	93.6%	91.3%
Spanish Mainland	3.7%	3.8%	3.5%	3.7%	5.0%
Switzerland	1.7%	1.7%	2.5%	1.9%	3.0%
United Kingdom	0.2%	0.0%	0.1%	0.0%	0.2%
Belgium	0.3%	0.0%	0.1%	0.1%	0.1%
Norway	0.0%	0.0%	0.0%	0.0%	0.1%
Austria	0.4%	0.3%	0.4%	0.1%	0.0%
Denmark	0.1%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.1%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%

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



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	93.8%	92.6%	92.6%	91.8%	91.7%
Beaches	56.1%	56.9%	61.7%	57.2%	55.0%
Tranquillity/rest/relaxation	53.3%	49.7%	48.7%	47.3%	45.6%
Scenery	22.7%	23.6%	25.7%	24.9%	23.7%
Security	3.2%	5.9%	4.3%	9.0%	18.5%
Visiting new places	17.0%	15.9%	14.0%	16.3%	15.3%
Price	7.2%	6.1%	7.2%	7.5%	7.6%
Suitable destination for children	6.4%	5.7%	6.9%	6.5%	5.7%
Nautical activities	4.5%	4.6%	4.3%	4.4%	4.0%
Active tourism	4.0%	4.4%	3.9%	4.1%	3.8%
Theme parks	4.0%	3.3%	3.6%	3.6%	3.5%
Ease of travel	3.1%	3.3%	2.5%	2.6%	2.5%
Culture	2.0%	2.1%	2.1%	2.0%	2.5%
Quality of the environment	2.0%	3.1%	2.0%	2.9%	2.2%
Rural tourism	1.1%	1.2%	1.3%	1.4%	1.8%
Shopping	1.8%	1.4%	1.4%	1.6%	1.3%

\* Multi-choice question

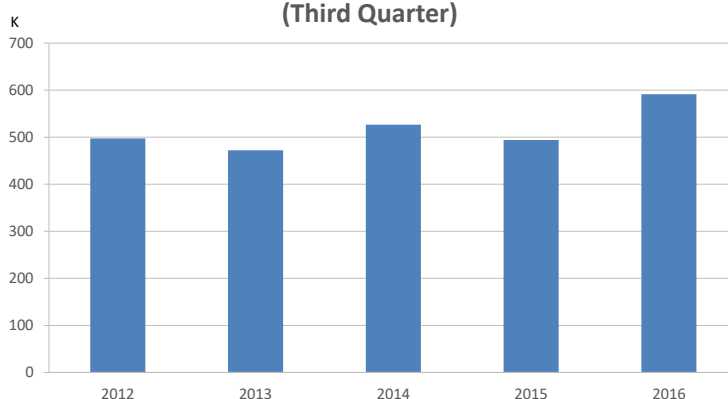
#### What did motivate them to come?



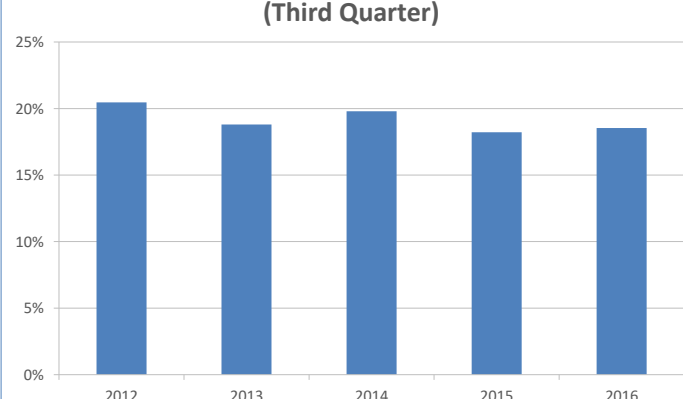
Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	54.5%	55.7%	56.2%	54.4%	54.7%
Recommendation by friends or relatives	36.0%	33.1%	31.2%	32.7%	34.9%
The Canary Islands television channel	0.7%	0.5%	0.6%	0.8%	0.5%
Other television or radio channels	1.5%	1.6%	1.0%	1.5%	1.5%
Information in the press/magazines/books	4.5%	3.5%	4.1%	3.8%	3.6%
Attendance at a tourism fair	0.4%	0.4%	0.6%	0.4%	0.5%
Tour Operator's brochure or catalogue	17.9%	13.0%	13.5%	12.7%	12.3%
Recommendation by Travel Agency	24.5%	26.5%	23.9%	24.7%	25.5%
Information obtained via the Internet	24.3%	24.4%	26.5%	27.6%	27.8%
Senior Tourism programme	0.0%	0.1%	0.1%	0.1%	0.1%
Others	4.6%	3.6%	5.1%	3.4%	4.2%

\* Multi-choice question

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



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