Tourist profile trend (2017)

Germany: Third Quarter

How many are they and how much do they spend?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	472,311	526,595	493,995	591,310	620,012
Average daily expenditure (€)	121.13	121.21	124.60	129.31	131.63
. in their place of residence	95.67	95.51	98.59	102.73	104.33
. in the Canary Islands	25.46	25.70	26.01	26.58	27.30
Average lenght of stay	10.58	10.43	10.49	10.50	10.32
Turnover per tourist (€)	1,198	1,190	1,222	1,278	1,245
Total turnover (> 16 years old) (€m)	566	626	603	756	772
Share of total turnover	20.9%	21.6%	20.3%	21.2%	--
Share of total tourist	21.7%	22.5%	21.1%	21.7%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	24.29	23.62	28.41	28.67	28.96
- Accommodation	19.66	18.16	23.71	21.14	21.52
- Additional accommodation expenses	4.64	5.46	4.70	7.53	7.44
Transport:	23.78	20.68	24.06	22.25	23.59
- Public transport	2.65	2.45	3.23	3.69	3.10
- Taxi	4.50	3.74	3.44	3.37	3.32
- Car rental	16.63	14.49	17.38	15.19	17.17
Food and drink:	84.22	85.37	91.49	100.53	100.03
- Food purchases at supermarkets	40.22	39.07	43.50	43.17	42.32
- Restaurants	44.00	46.30	47.99	57.36	57.70
Souvenirs:	61.42	63.99	54.21	65.15	56.42
Leisure:	50.32	48.28	48.25	45.31	46.32
- Organized excursions	26.77	23.84	26.32	25.08	26.72
- Leisure, amusement	6.36	6.30	6.40	5.92	5.36
- Trip to other islands	1.97	2.92	1.55	2.18	1.71
- Sporting activities	8.17	8.40	8.93	7.17	7.62
- Cultural activities	2.57	2.27	2.12	2.48	1.58
- Discos and disco-pubs	4.47	4.55	2.93	2.47	3.32
Others:	16.46	16.66	12.98	11.86	13.64
- Wellness	3.45	2.84	3.31	3.22	3.01
- Medical expenses	1.15	1.48	1.51	1.22	1.96
- Other expenses	11.86	12.35	8.16	7.41	8.67

How far in advance do they book their trip?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.2%	0.1%	0.3%	0.5%	0.3%
Between 2 and 7 days	6.4%	8.3%	4.9%	3.7%	3.9%
Between 8 and 15 days	11.9%	9.2%	9.7%	6.6%	8.1%
Between 16 and 30 days	14.8%	14.5%	16.0%	11.6%	12.3%
Between 31 and 90 days	26.6%	22.0%	24.4%	23.1%	25.9%
More than 90 days	40.1%	45.8%	44.7%	54.4%	49.5%

What do they book at their place of residence?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	4.1%	4.2%	5.3%	5.1%	5.7%
Flight and accommodation (room only)	9.7%	8.9%	9.0%	9.9%	9.5%
Flight and accommodation (B&B)	3.3%	3.5%	3.6%	4.4%	5.1%
Flight and accommodation (half board)	33.6%	30.0%	31.0%	31.0%	28.4%
Flight and accommodation (full board)	2.7%	3.0%	2.5%	3.1%	3.2%
Flight and accommodation (all inclusive)	46.6%	50.5%	48.6%	46.5%	48.1%
% Tourists using low-cost airlines	17.1%	26.0%	24.6%	28.7%	29.5%
Other expenses in their place of residence:					
- Car rental	12.5%	11.5%	12.6%	13.0%	13.6%
- Sporting activities	11.2%	9.5%	10.1%	9.3%	8.8%
- Excursions	8.5%	8.9%	10.1%	9.2%	10.5%
- Trip to other islands	1.3%	1.5%	1.0%	1.8%	1.7%

How do they book?

Accommodation booking	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	35.9%	35.8%	36.9%	38.2%	37.3%
- Tour Operator´s website	61.9%	61.3%	60.5%	58.8%	64.0%
Accommodation	4.4%	3.7%	4.1%	3.7%	4.0%
- Accommodation´s website	78.3%	76.4%	71.9%	74.1%	78.2%
Travel agency (High street)	43.5%	42.6%	40.3%	39.6%	38.0%
Online Travel Agency (OTA)	12.9%	14.6%	14.7%	14.6%	15.9%
No need to book accommodation	3.5%	3.4%	4.0%	3.9%	4.9%

Flight booking	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	38.6%	37.6%	40.4%	39.3%	40.9%
- Tour Operator´s website	52.0%	60.1%	52.9%	55.9%	61.5%
Airline	7.8%	8.2%	8.3%	7.7%	7.9%
- Airline´s website	92.0%	89.6%	89.3%	86.4%	93.8%
Travel agency (High street)	40.1%	39.8%	37.1%	37.9%	35.4%
Online Travel Agency (OTA)	13.5%	14.4%	14.2%	15.0%	15.7%

Where do they stay?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	4.8%	4.6%	4.2%	3.9%	3.6%
4* Hotel	50.4%	50.3%	54.0%	48.2%	50.6%
1-2-3* Hotel	21.3%	22.2%	18.3%	20.4%	18.7%
Apartment	19.7%	19.2%	18.9%	21.3%	20.9%
Property (privately-owned,friends,family)	3.1%	3.1%	3.8%	3.5%	4.0%
Others	0.7%	0.6%	0.8%	2.8%	2.2%

Who are they?

Gender	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Percentage of men	48.5%	50.2%	49.1%	49.7%	47.1%
Percentage of women	51.5%	49.8%	50.9%	50.3%	52.9%
Age					
Average age (tourists > 16 years old)	37.5	38.0	38.3	41.1	40.9
Standard deviation	13.0	12.9	13.1	14.6	14.8
Age range (> 16 years old)					
16-24 years old	19.1%	18.1%	18.1%	16.4%	17.5%
25-30 years old	20.7%	18.6%	18.1%	14.4%	14.2%
31-45 years old	29.3%	30.6%	30.2%	27.1%	28.0%
46-60 years old	27.5%	29.0%	29.0%	32.5%	29.7%
Over 60 years old	3.4%	3.7%	4.7%	9.7%	10.7%
Occupation					
Business owner or self-employed	11.0%	12.0%	9.8%	10.6%	12.3%
Upper/Middle management employee	58.2%	56.2%	55.1%	54.3%	51.1%
Auxiliary level employee	14.0%	17.0%	18.4%	16.2%	16.6%
Students	12.1%	10.7%	11.0%	10.5%	11.1%
Retired	2.7%	2.2%	3.7%	6.8%	7.9%
Unemployed / unpaid dom. work	1.9%	2.0%	2.0%	1.6%	1.0%
Annual household income level					
€12,000 - €24,000	19.1%	18.7%	17.2%	17.4%	20.2%
€24,001 - €36,000	19.8%	20.5%	18.8%	17.4%	17.6%
€36,001 - €48,000	16.0%	16.3%	17.2%	16.4%	15.8%
€48,001 - €60,000	15.8%	16.0%	16.7%	17.7%	17.5%
€60,001 - €72,000	8.8%	8.6%	9.5%	10.5%	9.3%
€72,001 - €84,000	7.0%	4.9%	5.0%	4.7%	5.6%
More than €84,000	13.5%	14.9%	15.5%	15.8%	13.9%

(*) 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 (2017)

Germany: Third Quarter

Which island do they choose?

Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	51,912	57,804	53,320	63,320	65,213
- Fuerteventura	161,819	190,273	177,741	185,632	191,782
- Gran Canaria	128,288	139,720	131,279	176,687	186,334
- Tenerife	113,067	122,590	114,197	145,296	152,315
- La Palma	8,001	7,828	10,547	14,495	16,106

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	11.2%	11.2%	10.9%	10.8%	10.7%
- Fuerteventura	34.9%	36.7%	36.5%	31.7%	31.3%
- Gran Canaria	27.7%	27.0%	27.0%	30.2%	30.5%
- Tenerife	24.4%	23.7%	23.4%	24.8%	24.9%
- La Palma	1.7%	1.5%	2.2%	2.5%	2.6%

Who do they come with?

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	7.4%	7.5%	7.1%	6.3%	6.6%
Only with partner	47.7%	46.6%	48.5%	44.2%	46.8%
Only with children (under the age of 13)	2.4%	2.0%	1.5%	1.8%	2.0%
Partner + children (under the age of 13)	11.9%	15.4%	15.6%	14.5%	14.4%
Other relatives	5.7%	4.7%	5.2%	6.0%	4.1%
Friends	5.9%	5.4%	4.3%	4.6%	5.0%
Work colleagues	0.3%	0.2%	0.1%	0.0%	0.2%
Other combinations (1)	18.7%	18.3%	17.8%	22.6%	20.9%

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

How do they rate the destination?

Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	92.1%	93.3%	92.1%	93.5%	93.3%
Average rating (scale 1-10)	8.65	8.69	8.66	8.74	8.76

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	65.9%	68.0%	64.8%	66.7%	67.0%
In love (at least 10 previous visits)	10.0%	8.5%	10.1%	8.8%	10.2%

Where does the flight come from?

Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Germany	93.4%	92.4%	93.6%	91.3%	90.7%
Spanish Mainland	3.8%	3.5%	3.7%	5.0%	4.8%
Switzerland	1.7%	2.5%	1.9%	3.0%	3.3%
United Kingdom	0.0%	0.1%	0.0%	0.2%	0.2%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.2%
Denmark	0.0%	0.0%	0.0%	0.0%	0.1%
Belgium	0.0%	0.1%	0.1%	0.1%	0.1%
Ireland	0.0%	0.0%	0.0%	0.0%	0.1%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Austria	0.3%	0.4%	0.1%	0.0%	0.0%

Why do they choose the Canary Islands?

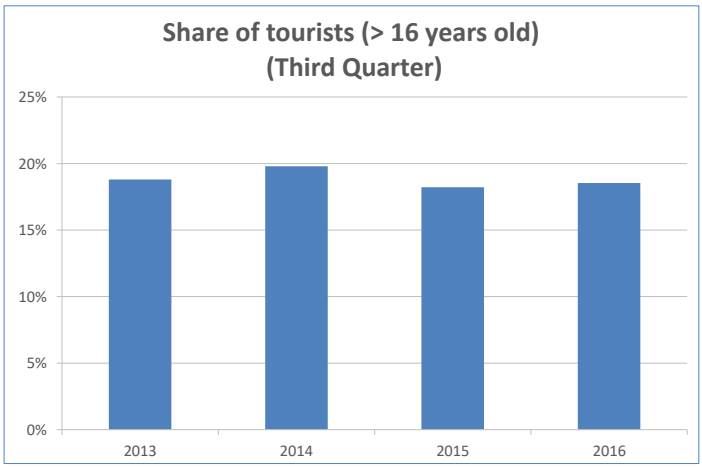
Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	92.6%	92.6%	91.8%	91.7%	92.1%
Beaches	56.9%	61.7%	57.2%	55.0%	56.3%
Tranquillity/rest/relaxation	49.7%	48.7%	47.3%	45.6%	46.8%
Scenery	23.6%	25.7%	24.9%	23.7%	24.4%
Visiting new places	15.9%	14.0%	16.3%	15.3%	16.1%
Security	5.9%	4.3%	9.0%	18.5%	13.3%
Price	6.1%	7.2%	7.5%	7.6%	7.1%
Suitable destination for children	5.7%	6.9%	6.5%	5.7%	6.2%
Active tourism	4.4%	3.9%	4.1%	3.8%	4.6%
Theme parks	3.3%	3.6%	3.6%	3.5%	2.9%
Ease of travel	3.3%	2.5%	2.6%	2.5%	2.9%
Nautical activities	4.6%	4.3%	4.4%	4.0%	2.8%
Culture	2.1%	2.1%	2.0%	2.5%	2.7%
Quality of the environment	3.1%	2.0%	2.9%	2.2%	2.6%
Shopping	1.4%	1.4%	1.6%	1.3%	1.5%
Rural tourism	1.2%	1.3%	1.4%	1.8%	1.3%

** Multi-choise question*

What did motivate them to come?

Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	55.7%	56.2%	54.4%	54.7%	56.3%
Recommendation by friends or relatives	33.1%	31.2%	32.7%	34.9%	35.1%
The Canary Islands television channel	0.5%	0.6%	0.8%	0.5%	0.7%
Other television or radio channels	1.6%	1.0%	1.5%	1.5%	1.4%
Information in the press/magazines/books	3.5%	4.1%	3.8%	3.6%	3.5%
Attendance at a tourism fair	0.4%	0.6%	0.4%	0.5%	0.7%
Tour Operator's brochure or catalogue	13.0%	13.5%	12.7%	12.3%	9.7%
Recommendation by Travel Agency	26.5%	23.9%	24.7%	25.5%	24.7%
Information obtained via the Internet	24.4%	26.5%	27.6%	27.8%	30.0%
Senior Tourism programme	0.1%	0.1%	0.1%	0.1%	0.1%
Others	3.6%	5.1%	3.4%	4.2%	2.9%

** Multi-choise 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.