

# Tourist profile by islands (2016)

## German market



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



### How do they book?



	Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Tourist arrivals (> 16 years old)	298,196	784,700	846,822	670,472	81,455
Average daily expenditure (€)	125.55	131.25	152.05	130.87	117.58
. in their place of residence	98.93	109.62	119.77	97.19	83.69
. in the Canary Islands	26.62	21.62	32.28	33.68	33.88
Average length of stay	10.99	10.19	10.62	10.72	12.58
Turnover per tourist (€)	1,275	1,242	1,423	1,235	1,316
Total turnover (> 16 years old) (€m)	380.1	974.5	1,205.1	828	107.17
German turnover: share by islands	10.9%	27.9%	34.5%	23.7%	3.1%
German tourist arrivals: share by islands	11.1%	29.3%	31.6%	25.0%	3.0%

	LZ	FUE	GC	TFE	LP
<b>Accommodation booking</b>					
<b>Tour Operator</b>	39.3%	42.1%	42.5%	36.9%	29.6%
- Tour Operator's website	65.9%	59.8%	57.6%	60.4%	71.5%
<b>Accommodation</b>	6.5%	3.6%	4.6%	5.7%	13.0%
- Accommodation's website	78.0%	73.1%	74.4%	75.9%	79.9%
<b>Travel agency (High street)</b>	39.5%	38.2%	34.8%	31.9%	25.2%
<b>Online Travel Agency (OTA)</b>	13.5%	15.2%	14.8%	19.1%	25.3%
<b>No need to book accommodation</b>	1.2%	0.9%	3.2%	6.4%	6.8%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
<b>Accommodation (**):</b>	31.96	23.44	41.71	47.61	57.92
- Accommodation	25.59	18.24	34.05	37.57	53.92
- Additional accommodation expenses	6.37	5.20	7.66	10.04	4.00
<b>Transport:</b>	34.93	18.49	23.97	30.04	61.17
- Public transport	3.94	2.31	5.68	3.22	3.76
- Taxi	2.96	3.47	6.35	3.45	3.35
- Car rental	28.03	12.71	11.93	23.37	54.05
<b>Food and drink:</b>	108.27	69.84	132.31	131.99	206.36
- Food purchases at supermarkets	44.82	24.63	61.93	59.82	99.89
- Restaurants	63.45	45.21	70.37	72.16	106.47
<b>Souvenirs:</b>	46.83	54.15	74.62	59.49	35.88
<b>Leisure:</b>	41.44	32.94	39.27	45.45	22.74
- Organized excursions	25.50	12.40	20.32	25.35	13.20
- Leisure, amusement	2.67	3.07	3.45	8.52	0.92
- Trip to other islands	3.68	1.97	1.68	1.94	0.79
- Sporting activities	4.33	11.49	6.46	5.59	5.83
- Cultural activities	4.53	2.18	1.29	2.03	1.83
- Discos and disco-pubs	0.73	1.83	6.06	2.01	0.17
<b>Others:</b>	15.55	16.67	17.50	16.93	22.39
- Wellness	4.22	5.11	4.25	3.62	1.74
- Medical expenses	2.32	2.44	2.73	2.94	1.82
- Other expenses	9.01	9.12	10.53	10.37	18.83

	LZ	FUE	GC	TFE	LP
<b>Flight booking</b>					
<b>Tour Operator</b>	41.9%	44.4%	43.5%	37.8%	29.5%
- Tour Operator's website	57.9%	54.9%	54.0%	55.7%	67.1%
<b>Airline</b>	7.3%	5.8%	9.4%	13.5%	22.2%
- Airline's website	94.4%	88.4%	90.9%	91.6%	98.0%
<b>Travel agency (High street)</b>	37.0%	35.1%	32.6%	30.3%	27.2%
<b>Online Travel Agency (OTA)</b>	13.8%	14.7%	14.5%	18.3%	21.1%

### Where do they stay?



	LZ	FUE	GC	TFE	LP
5* Hotel	3.9%	0.9%	6.9%	6.4%	0.0%
4* Hotel	57.6%	61.0%	35.1%	49.0%	26.0%
1-2-3* Hotel	8.6%	22.9%	19.6%	15.7%	9.1%
Apartment	28.3%	13.8%	23.7%	19.8%	54.6%
Property (privately-owned, friends, family)	0.8%	0.6%	2.5%	6.2%	6.2%
Others	0.7%	0.8%	12.1%	2.9%	4.1%

### Who are they?



	LZ	FUE	GC	TFE	LP
<b>Gender</b>					
Percentage of men	47.2%	50.3%	50.3%	49.5%	47.7%
Percentage of women	52.8%	49.7%	49.7%	50.5%	52.3%

Age					
Average age (tourists > 16 years old)	52.0	46.0	49.1	45.2	51.7
Standard deviation	15.1	15.5	16.4	15.6	13.2

Age range (> 16 years old)					
16-24 years old	4.8%	8.8%	8.7%	9.9%	2.9%
25-30 years old	6.5%	11.8%	10.1%	14.3%	5.8%
31-45 years old	20.3%	28.0%	19.9%	24.4%	21.0%
46-60 years old	36.8%	32.4%	34.0%	33.1%	43.7%
Over 60 years old	31.5%	19.0%	27.4%	18.3%	26.6%

Occupation					
Business owner or self-employed	10.5%	13.0%	14.6%	14.5%	18.5%
Upper/Middle management employee	47.4%	50.9%	43.7%	49.4%	51.3%
Auxiliary level employee	9.7%	11.6%	13.1%	13.1%	7.3%
Students	3.7%	6.7%	5.4%	7.2%	2.1%
Retired	27.3%	16.0%	21.8%	14.3%	19.0%
Unemployed / unpaid dom. work	1.4%	1.8%	1.4%	1.4%	1.9%

Annual household income level					
€12,000 - €24,000	12.3%	12.9%	14.2%	16.0%	9.9%
€24,001 - €36,000	18.9%	16.6%	17.9%	18.9%	14.5%
€36,001 - €48,000	19.6%	17.7%	17.2%	18.0%	14.7%
€48,001 - €60,000	15.9%	16.0%	17.7%	16.4%	21.7%
€60,001 - €72,000	8.9%	10.6%	10.6%	9.9%	12.4%
€72,001 - €84,000	6.8%	5.7%	6.4%	5.6%	6.3%
More than €84,000	17.6%	20.4%	16.0%	15.1%	20.5%

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



	LZ	FUE	GC	TFE	LP
The same day they leave	0.2%	0.3%	0.2%	0.5%	0.7%
Between 2 and 7 days	3.6%	5.3%	4.6%	3.7%	2.8%
Between 8 and 15 days	3.0%	7.2%	6.6%	6.3%	5.4%
Between 16 and 30 days	11.9%	14.2%	12.8%	14.9%	10.2%
Between 31 and 90 days	34.7%	30.8%	31.7%	34.1%	36.8%
More than 90 days	46.7%	42.2%	44.1%	40.5%	44.1%

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



	LZ	FUE	GC	TFE	LP
Flight only	2.5%	1.5%	4.2%	9.2%	11.8%
Flight & accommodation (room only)	11.2%	6.9%	13.4%	15.6%	43.2%
Flight & accommodation (B&B)	5.8%	2.4%	4.3%	7.6%	7.0%
Flight & accommodation (half board)	32.6%	24.2%	33.7%	39.8%	25.7%
Flight & accommodation (full board)	3.3%	4.6%	6.6%	3.0%	1.1%
Flight & accommodation (all inclusive)	44.6%	60.5%	37.8%	24.8%	11.3%
<b>% Tourists using low-cost airlines</b>	23.3%	30.7%	27.6%	32.1%	19.8%
<b>Other expenses in their place of residence:</b>					
- Car rental	17.8%	10.6%	9.4%	20.7%	48.5%
- Sporting activities	6.1%	15.2%	6.9%	6.0%	5.7%
- Excursions	9.1%	6.5%	7.6%	12.4%	11.9%
- Trip to other islands	1.5%	1.5%	6.3%	2.0%	0.8%

(\*) 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 by islands (2016)

## German market



### Which island do they choose?

Tourists (> 16 years old)	LZ	FUE	GC	TFE	LP
- 2012	232,655	648,065	661,228	565,919	54,846
- 2013	235,733	650,940	638,700	564,335	45,214
- 2014	251,440	722,976	698,575	566,517	50,795
- 2015	247,710	694,861	715,643	576,886	55,310
- 2016	298,196	784,700	846,822	670,472	81,455

Share (%)	LZ	FUE	GC	TFE	LP
- 2012	10.8%	30.0%	30.6%	26.2%	2.5%
- 2013	11.0%	30.5%	29.9%	26.4%	2.1%
- 2014	11.0%	31.6%	30.5%	24.7%	2.2%
- 2015	10.8%	30.3%	31.2%	25.2%	2.4%
- 2016	11.1%	29.3%	31.6%	25.0%	3.0%

### Who do they come with?

	LZ	FUE	GC	TFE	LP
Unaccompanied	5.0%	8.7%	10.5%	9.8%	9.9%
Only with partner	60.4%	52.9%	54.8%	54.9%	65.2%
Only with children (under the age of 13)	0.8%	1.2%	1.2%	1.0%	0.6%
Partner + children (under the age of 13)	9.8%	12.5%	6.1%	8.3%	4.8%
Other relatives	5.1%	5.7%	4.8%	5.0%	3.7%
Friends	3.7%	4.8%	7.4%	6.1%	4.9%
Work colleagues	0.1%	0.1%	0.2%	0.2%	0.2%
Other combinations <sup>(1)</sup>	14.9%	14.2%	15.1%	14.7%	10.7%

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

### How do they rate the destination?

Impression of their stay	LZ	FUE	GC	TFE	LP
Good or very good (% tourists)	95.4%	93.7%	92.2%	93.8%	97.7%
Average rating (scale 1-10)	8.81	8.68	8.65	8.68	9.11

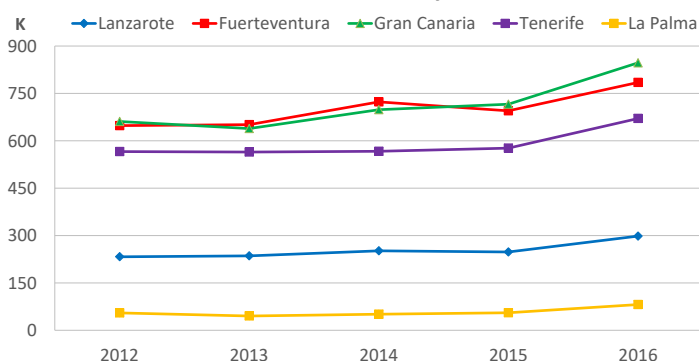
### How many are loyal to the destination?

Repeat tourists of each island	LZ	FUE	GC	TFE	LP
Repeat tourists	55.3%	58.5%	55.8%	48.7%	46.9%
In love (at least 10 previous visits)	5.7%	8.9%	9.7%	5.2%	6.5%

### Where does the flight come from?

Ten main origin markets	LZ	FUE	GC	TFE	LP
Germany	96.2%	97.4%	91.7%	92.0%	79.6%
Spanish Mainland	0.9%	0.7%	3.9%	4.6%	19.7%
Switzerland	2.0%	1.2%	3.4%	2.0%	0.2%
Belgium	0.0%	0.1%	0.1%	0.5%	0.1%
Austria	0.0%	0.1%	0.2%	0.2%	0.0%
United Kingdom	0.2%	0.0%	0.1%	0.2%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.1%	0.0%
Norway	0.0%	0.0%	0.1%	0.1%	0.0%
Sweden	0.0%	0.0%	0.1%	0.0%	0.0%
Italy	0.0%	0.0%	0.0%	0.0%	0.0%

### Tourist arrivals trend by islands



### Why do they choose the Canary Islands?

Aspects influencing the choice	LZ	FUE	GC	TFE	LP
Climate/sun	94.3%	94.9%	94.4%	92.6%	85.6%
Beaches	31.4%	72.5%	49.2%	25.4%	10.8%
Tranquility/rest/relaxation	41.8%	51.8%	41.6%	36.6%	41.4%
Scenery	44.9%	10.8%	25.7%	44.2%	70.3%
Security	17.5%	16.8%	17.0%	13.9%	7.5%
Visiting new places	15.9%	9.2%	14.5%	16.8%	13.3%
Active tourism	3.5%	2.3%	3.5%	11.4%	33.7%
Ease of travel	6.0%	4.4%	6.9%	5.3%	2.4%
Price	6.3%	4.7%	5.1%	6.1%	2.3%
Suitable destination for children	5.6%	5.7%	3.4%	3.4%	0.6%
Quality of the environment	4.7%	2.3%	2.2%	3.6%	12.5%
Nautical activities	2.2%	6.4%	1.4%	2.2%	0.9%
Culture	5.4%	0.4%	1.9%	2.7%	0.8%
Theme parks	0.2%	0.1%	0.7%	6.2%	0.1%
Rural tourism	2.6%	0.6%	1.5%	1.9%	2.4%
Shopping	1.6%	1.0%	1.9%	1.5%	0.3%

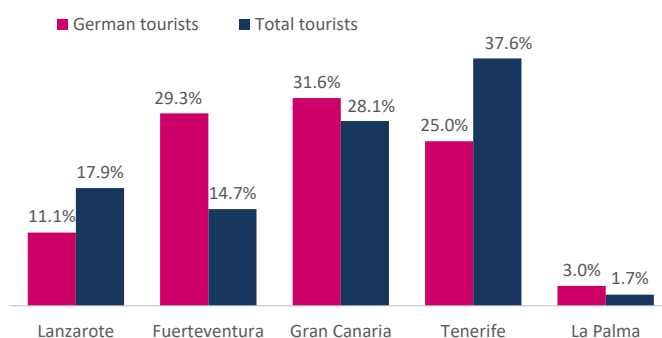
\* Multi-choice question

### What did motivate them to come?

Aspects motivating the choice	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	74.5%	68.5%	65.2%	59.4%	71.3%
Recommendation by friends or relatives	26.2%	28.5%	28.7%	35.7%	36.7%
The Canary Islands television channel	0.4%	0.5%	0.7%	0.6%	0.2%
Other television or radio channels	1.5%	0.8%	1.4%	1.5%	7.2%
Information in the press/magazines/books	5.4%	2.8%	3.8%	5.5%	5.9%
Attendance at a tourism fair	0.6%	0.4%	0.4%	0.7%	0.5%
Tour Operator's brochure or catalogue	10.0%	10.6%	9.9%	8.8%	3.3%
Recommendation by Travel Agency	19.0%	20.6%	18.2%	16.0%	7.7%
Information obtained via the Internet	20.7%	23.9%	22.3%	23.2%	18.8%
Senior Tourism programme	0.0%	0.0%	0.0%	0.1%	0.1%
Others	2.7%	3.7%	6.8%	5.4%	5.1%

\* Multi-choice question

### Share of tourists by islands (2016)



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.