

## Tourist profile trend (2015)

### Canary Islands: German

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



	2011	2012	2013	2014	2015
Tourist arrivals (> 16 years old)	2,291,707	2,352,380	2,315,607	2,515,041	2,537,069
Average daily expenditure (€)	120.83	126.21	129.65	128.28	130.13
. in their place of residence	93.55	98.48	101.81	100.32	101.92
. in the Canary Islands	27.28	27.73	27.84	27.96	28.20
Average length of stay	10.86	10.48	10.58	10.32	10.59
Turnover per tourist (€)	1,182	1,216	1,235	1,213	1,241
Total turnover (> 16 years old) (€m)	2,710	2,861	2,860	3,051	3,147
Year on year variation of turnover	--	5.6%	0.0%	6.7%	3.1%
Year on year variation of tourist	--	2.6%	-1.6%	8.6%	0.9%

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

	2011	2012	2013	2014	2015
<b>Accommodation (*)</b> :	32.29	25.86	30.20	30.23	33.03
- Accommodation	22.61	19.82	25.22	24.23	27.32
- Additional accommodation expenses	9.68	6.04	4.98	6.00	5.71
<b>Transport:</b>	30.11	27.19	26.81	25.00	27.02
- Public transport	4.37	3.83	3.95	3.49	3.80
- Taxi	5.33	4.83	4.68	4.13	4.38
- Car rental	20.42	18.53	18.18	17.38	18.84
<b>Food and drink:</b>	102.80	95.52	102.97	103.25	112.46
- Food purchases at supermarkets	46.05	40.10	45.59	44.66	51.17
- Restaurants	56.75	55.43	57.38	58.60	61.29
<b>Souvenirs:</b>	51.24	57.23	60.61	60.63	57.55
<b>Leisure:</b>	43.99	44.72	42.17	39.87	39.17
- Organized excursions	20.98	20.57	21.24	19.13	19.08
- Leisure, amusement	6.09	6.19	5.18	5.30	4.69
- Trip to other islands	1.79	1.98	2.04	2.16	1.56
- Sporting activities	7.39	7.06	7.50	7.51	7.78
- Cultural activities	2.00	2.54	2.07	2.24	2.32
- Discos and disco-pubs	5.73	6.38	4.15	3.54	3.74
<b>Others:</b>	24.39	25.79	18.65	15.51	21.71
- Wellness	4.63	5.65	4.82	4.25	3.66
- Medical expenses	3.33	3.11	2.39	1.97	2.45
- Other expenses	16.43	17.03	11.44	9.29	15.60

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



	2011	2012	2013	2014	2015
The same day they leave	0.4%	0.4%	0.4%	0.3%	0.4%
Between 2 and 7 days	8.8%	8.2%	6.9%	7.2%	5.8%
Between 8 and 15 days	10.5%	10.8%	10.2%	9.3%	8.2%
Between 16 and 30 days	18.1%	16.9%	17.0%	16.4%	15.7%
Between 31 and 90 days	30.0%	30.3%	30.7%	29.7%	32.5%
More than 90 days	32.3%	33.4%	34.8%	37.1%	37.4%

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



	2011	2012	2013	2014	2015
Flight only	5.5%	4.8%	5.4%	4.7%	6.4%
Flight and accommodation (room only)	9.7%	9.0%	10.1%	10.2%	11.9%
Flight and accommodation (B&B)	4.2%	4.7%	4.7%	5.4%	5.2%
Flight and accommodation (half board)	37.4%	35.7%	33.7%	34.1%	30.6%
Flight and accommodation (full board)	3.4%	3.8%	4.4%	4.0%	4.5%
Flight and accommodation (all inclusive)	39.7%	41.9%	41.7%	41.6%	41.4%
<b>% Tourists using low-cost airlines</b>	17.2%	15.7%	18.1%	23.1%	27.4%
<b>Other expenses in their place of residence:</b>					
- Car rental	12.7%	12.9%	13.7%	14.7%	15.4%
- Sporting activities	9.3%	9.6%	10.1%	9.6%	10.0%
- Excursions	6.6%	6.9%	7.4%	8.6%	9.6%
- Combined trip to other islands	1.5%	1.7%	3.3%	3.1%	5.2%

(\*) Bear in mind that 94% of German tourists in 2015 paid the accommodation before travelling.

#### How do they book?



	2011	2012	2013	2014	2015
<b>Accommodation booking</b>					
<b>Tour Operator</b>	47.4%	42.6%	38.3%	40.7%	38.1%
- Tour Operator's website	57.5%	54.9%	63.2%	61.0%	61.9%
<b>Accommodation</b>	4.2%	4.0%	4.9%	5.0%	6.0%
- Accommodation's website	73.5%	80.7%	72.2%	80.0%	73.0%
<b>Travel agency (High street)</b>	31.4%	36.1%	38.2%	36.5%	34.7%
<b>Online Travel Agency (OTA)</b>	13.3%	13.9%	14.7%	14.5%	16.5%
<b>No need to book accommodation</b>	3.8%	3.5%	3.9%	3.3%	4.8%

#### Flight booking

	2011	2012	2013	2014	2015
<b>Tour Operator</b>	54.6%	46.9%	40.2%	41.1%	40.8%
- Tour Operator's website	52.7%	50.5%	56.8%	57.2%	57.1%
<b>Airline</b>	7.3%	7.9%	9.0%	10.3%	11.7%
- Airline's website	92.4%	91.3%	91.1%	91.1%	92.0%
<b>Travel agency (High street)</b>	24.8%	31.6%	35.8%	34.3%	31.9%
<b>Online Travel Agency (OTA)</b>	13.3%	13.6%	15.0%	14.3%	15.6%

#### Where do they stay?



	2011	2012	2013	2014	2015
5* Hotel	6.0%	5.7%	5.7%	5.6%	4.2%
4* Hotel	51.3%	53.1%	51.3%	52.9%	48.0%
1-2-3* Hotel	22.6%	22.6%	20.2%	22.0%	17.3%
Apartment	14.7%	13.1%	15.3%	13.6%	20.0%
Property (privately-owned, friends, family)	2.5%	2.7%	3.4%	2.7%	3.9%
Others	2.9%	2.7%	4.1%	3.1%	6.7%

#### How are they?



	2011	2012	2013	2014	2015
<b>Gender</b>					
Percentage of men	50.1%	51.1%	49.5%	50.8%	50.7%
Percentage of women	49.9%	48.9%	50.5%	49.2%	49.3%
<b>Age</b>					
Average age (tourists > 16 years old)	44.1	43.7	44.1	43.9	44.7
Standard deviation	15.2	15.0	15.3	15.0	15.3
<b>Age range</b>					
16-24 years old	9.0%	9.6%	9.0%	9.0%	8.8%
25-30 years old	15.4%	14.3%	15.3%	14.5%	14.6%
31-45 years old	31.6%	33.0%	31.7%	32.6%	28.6%
46-60 years old	26.6%	27.1%	27.2%	28.4%	30.9%
Over 60 years old	17.4%	15.9%	16.8%	15.5%	17.1%
<b>Occupation</b>					
Business owner or self-employed	15.2%	15.3%	14.7%	14.9%	13.8%
Upper/Middle management employee	49.9%	51.3%	51.9%	52.6%	50.9%
Auxiliary level employee	11.3%	12.1%	11.3%	11.6%	12.4%
Students	5.8%	6.2%	6.7%	6.2%	6.8%
Retired	15.8%	13.2%	13.6%	12.7%	14.4%
Unemployed / unpaid dom. work	2.0%	1.9%	1.9%	1.9%	1.6%
<b>Annual household income level</b>					
€12,000 - €24,000	16.4%	16.1%	16.3%	14.4%	14.9%
€24,001 - €36,000	20.5%	20.1%	18.6%	17.7%	17.0%
€36,001 - €48,000	18.4%	18.0%	17.7%	17.7%	17.8%
€48,001 - €60,000	15.9%	15.8%	15.6%	17.4%	16.6%
€60,001 - €72,000	9.5%	9.0%	9.8%	9.4%	9.9%
€72,001 - €84,000	5.8%	6.3%	6.2%	5.9%	6.2%
More than €84,000	13.4%	14.7%	15.9%	17.5%	17.5%

# Tourist profile trend (2015)

## Canary Islands: German



### Which island do they choose?



Tourists (> 16 years old)	2011	2012	2013	2014	2015
- Lanzarote	257,736	255,908	280,264	308,593	288,353
- Fuerteventura	674,414	701,295	685,640	782,823	725,154
- Gran Canaria	661,147	679,043	663,723	695,113	792,732
- Tenerife	588,470	613,663	591,844	601,905	609,239
- La Palma	50,321	54,300	43,113	71,920	57,391

Share (%)	2011	2012	2013	2014	2015
- Lanzarote	11.5%	11.1%	12.4%	12.5%	11.7%
- Fuerteventura	30.2%	30.4%	30.3%	31.8%	29.3%
- Gran Canaria	29.6%	29.5%	29.3%	28.3%	32.1%
- Tenerife	26.4%	26.6%	26.1%	24.5%	24.6%
- La Palma	2.3%	2.4%	1.9%	2.9%	2.3%

### Who do they come with?



	2011	2012	2013	2014	2015
Unaccompanied	9.0%	9.6%	10.7%	10.3%	9.8%
Only with partner	57.8%	56.0%	52.8%	52.6%	56.0%
Only with children (under the age of 13)	1.4%	1.2%	1.8%	1.4%	1.1%
Partner + children (under the age of 13)	8.9%	8.9%	9.9%	10.9%	8.9%
Other relatives	4.5%	5.1%	5.6%	5.1%	6.0%
Friends	6.6%	5.9%	5.2%	5.3%	5.3%
Work colleagues	0.3%	0.5%	0.4%	0.2%	0.3%

### Why do they choose the Canary Islands?



Aspects influencing the choice	2011	2012	2013	2014	2015
Climate/sun	95.0%	94.7%	94.5%	94.2%	93.4%
Beaches	46.9%	46.3%	46.3%	47.0%	45.2%
Tranquillity/rest/relaxation	48.6%	49.1%	47.2%	46.3%	44.3%
Scenery	30.2%	28.0%	29.6%	29.9%	31.4%
Visiting new places	13.1%	13.8%	13.4%	13.3%	13.4%
Security	6.0%	5.4%	5.7%	6.4%	8.7%
Active tourism	6.5%	6.4%	6.4%	7.1%	7.6%
Ease of travel	6.4%	7.1%	6.5%	6.3%	5.8%
Price	6.9%	6.8%	5.5%	6.3%	5.6%
Suitable destination for children	4.7%	4.8%	5.3%	5.7%	4.3%
Quality of the environment	2.9%	2.5%	3.2%	3.0%	3.6%
Nautical activities	3.4%	3.3%	3.7%	3.8%	3.5%
Theme parks	2.3%	2.8%	2.2%	1.9%	2.2%
Culture	1.9%	1.6%	2.0%	2.0%	2.1%
Shopping	1.5%	1.6%	1.2%	1.3%	1.6%
Nightlife/fun	2.2%	2.3%	1.9%	1.5%	1.5%

### How do they value the destination?



Impression of their stay	2011	2012	2013	2014	2015
Good or very good (% tourists)	92.0%	91.6%	92.5%	93.4%	92.2%
Average rating (scale 1-10)	8.58	8.52	8.63	8.68	8.62

### How many are loyal to the destination?

Percentage of repeat tourists	2011	2012	2013	2014	2015
Repeat tourists	75.6%	75.0%	75.2%	75.1%	75.6%
In love (more than 10 visits)	15.5%	13.9%	15.3%	13.0%	16.4%

### Where does the flight come from?



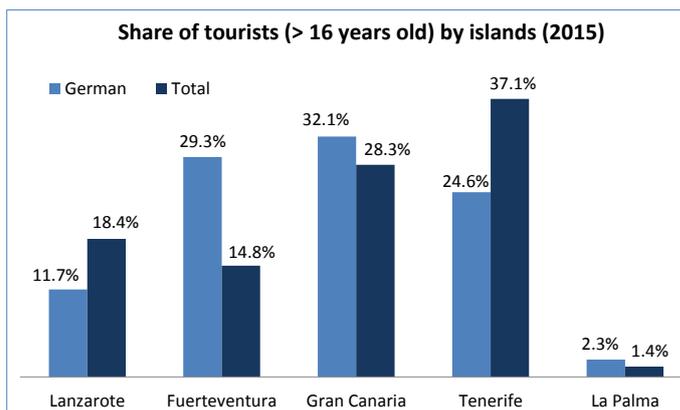
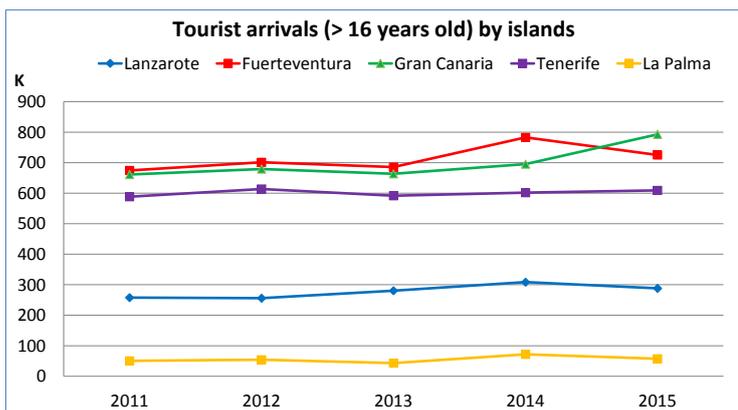
Ten main origin countries	2011	2012	2013	2014	2015
Germany	2,180,609	2,230,401	2,198,265	2,359,870	2,378,570
Spain	63,136	63,359	65,473	84,419	74,849
Switzerland	19,915	24,440	26,784	32,364	44,658
Others	9,970	12,672	11,252	18,294	18,522
Austria	4,894	8,126	10,420	6,119	5,227
Netherlands	1,475	2,692	242	2,410	3,852
Belgium	4,882	5,559	1,582	2,955	3,180
United Kingdom	1,662	3,401	595	2,191	2,755
France	2,288	518	0	1,579	1,447
Norway	0	0	0	1,462	1,158

### What did motivate them to come?



Aspects motivating the choice	2011	2012	2013	2014	2015
Previous visits to the Canary Islands	65.5%	64.9%	64.6%	63.6%	64.5%
Recommendation by friends or relatives	31.7%	32.1%	29.7%	30.6%	29.5%
The Canary Islands television channel	0.6%	0.5%	0.5%	0.5%	0.5%
Other television or radio channels	1.4%	1.1%	1.2%	1.0%	1.2%
Information in the press/magazines/books	5.0%	4.7%	4.6%	4.4%	3.9%
Attendance at a tourism fair	0.4%	0.6%	0.4%	0.4%	0.4%
Tour Operator's brochure or catalogue	12.0%	13.1%	10.5%	10.3%	9.1%
Recommendation by Travel Agency	18.4%	19.0%	19.1%	17.8%	17.4%
Information obtained via the Internet	21.8%	20.5%	21.5%	22.0%	22.2%
Senior Tourism programme	0.1%	0.0%	0.1%	0.1%	0.1%
Others	4.6%	4.7%	5.0%	5.2%	5.7%

\* Multi-choice question



Source: ISTAC (Encuesta sobre el Gasto Turístico).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.