

# TOURIST PROFILE BY QUARTER OF TRIP (2019) GERMANY



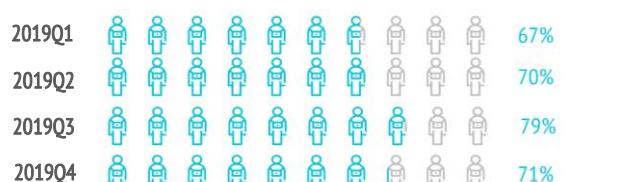
## How many are they and how much do they spend?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
<b>TOURISTS</b>					
Tourist arrivals (FRONTUR) (*)	0.77	0.58	0.55	0.75	2.65
Tourist arrivals > 15 years old (EGT) (*)	0.71	0.51	0.47	0.70	2.39
- book holiday package (*)	0.48	0.36	0.37	0.50	1.71
- do not book holiday package (*)	0.23	0.15	0.10	0.20	0.68
- % tourists who book holiday package	67.4%	70.4%	78.8%	71.3%	71.4%

(\*) Million of tourists



## % TOURISTS WHO BOOK HOLIDAY PACKAGE



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Expenditure per tourist (€)	1,154	1,319	1,380	1,297	1,276
- book holiday package	1,264	1,294	1,439	1,388	1,345
- holiday package	1,058	1,099	1,246	1,176	1,142
- others	205	195	193	212	203
- do not book holiday package	927	1,378	1,163	1,070	1,104
- flight	241	342	338	332	304
- accommodation	340	338	375	380	356
- others	346	698	449	358	443
Average lenght of stay	11.17	10.79	10.41	10.39	10.71
- book holiday package	10.52	9.91	9.92	10.01	10.11
- do not book holiday package	12.51	12.88	12.23	11.35	12.20
Average daily expenditure (€)	119.1	137.4	139.9	136.7	132.3
- book holiday package	132.3	139.8	149.4	147.7	142.1
- do not book holiday package	91.8	131.7	104.8	109.3	107.7
Total turnover (> 15 years old) (€m)	816	673	651	914	3,054
- book holiday package	603	465	535	698	2,300
- do not book holiday package	213	208	117	216	755

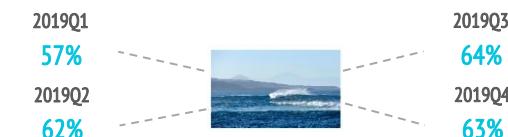


## Importance of each factor in the destination choice

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Climate	83.3%	75.7%	67.6%	82.7%	<b>78.4%</b>
Sea	56.7%	62.5%	64.4%	62.7%	<b>61.2%</b>
Safety	56.0%	59.0%	57.8%	52.9%	<b>56.1%</b>
Tranquility	51.6%	53.1%	50.9%	50.9%	<b>51.6%</b>
Beaches	41.3%	49.9%	53.3%	49.1%	<b>47.8%</b>
Effortless trip	46.5%	46.6%	44.5%	42.9%	<b>45.0%</b>
European belonging	44.1%	43.4%	39.1%	40.1%	<b>41.8%</b>
Accommodation supply	40.3%	42.3%	42.7%	41.5%	<b>41.6%</b>
Landscapes	43.1%	37.3%	31.7%	37.7%	<b>38.0%</b>
Price	30.6%	27.6%	30.2%	23.4%	<b>27.7%</b>
Environment	31.3%	30.6%	22.5%	24.4%	<b>27.4%</b>
Gastronomy	25.0%	22.8%	21.8%	22.7%	<b>23.2%</b>
Authenticity	19.0%	20.5%	19.2%	16.0%	<b>18.4%</b>
Fun possibilities	14.6%	15.8%	19.6%	14.9%	<b>15.9%</b>
Hiking trail network	16.4%	11.8%	6.8%	12.5%	<b>12.4%</b>
Shopping	8.9%	9.7%	10.9%	8.0%	<b>9.2%</b>
Historical heritage	10.1%	8.4%	8.0%	5.2%	<b>7.9%</b>
Culture	8.7%	7.2%	8.3%	5.5%	<b>7.4%</b>
Exoticism	7.3%	7.7%	8.3%	5.8%	<b>7.2%</b>
Nightlife	4.0%	4.3%	5.0%	4.0%	<b>4.3%</b>

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important"). % of tourists who indicate that the factor is "very important" in their choice.

## % TOURISTS WHO CHOOSE SEA



## What is the main motivation for their holidays?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Rest	42.9%	51.6%	52.0%	52.0%	<b>49.3%</b>
Enjoy family time	8.1%	10.0%	10.7%	8.3%	<b>9.1%</b>
Have fun	5.7%	6.7%	9.4%	7.2%	<b>7.1%</b>
Explore the destination	34.8%	25.8%	24.3%	27.1%	<b>28.5%</b>
Practice their hobbies	5.1%	3.6%	1.9%	3.0%	<b>3.5%</b>
Other reasons	3.4%	2.3%	1.6%	2.4%	<b>2.5%</b>

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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
The same day	0.7%	0.4%	0.6%	0.6%	<b>0.6%</b>
Between 1 and 30 days	25.9%	16.3%	19.4%	20.7%	<b>21.1%</b>
Between 1 and 2 months	23.5%	19.0%	16.0%	23.2%	<b>21.0%</b>
Between 3 and 6 months	33.5%	42.4%	34.5%	34.6%	<b>35.9%</b>
More than 6 months	16.5%	22.0%	29.5%	20.9%	<b>21.5%</b>

## % TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

Source: Encuesta sobre el Gasto Turístico (ISTAC).

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

# TOURIST PROFILE BY QUARTER OF TRIP (2019) GERMANY



## What channels did they use to get information about the trip? 🔎

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Previous visits to the Canary Islands	54.1%	52.1%	43.0%	56.4%	<b>52.2%</b>
Friends or relatives	21.4%	23.2%	24.3%	22.0%	<b>22.5%</b>
Internet or social media	50.3%	53.2%	55.4%	52.8%	<b>52.7%</b>
Mass Media	2.5%	2.6%	2.0%	2.3%	<b>2.3%</b>
Travel guides and magazines	13.1%	15.8%	12.9%	13.8%	<b>13.9%</b>
Travel Blogs or Forums	4.4%	5.8%	5.8%	4.1%	<b>4.9%</b>
Travel TV Channels	1.6%	1.3%	1.1%	1.5%	<b>1.4%</b>
Tour Operator or Travel Agency	27.4%	31.6%	38.7%	29.7%	<b>31.2%</b>
Public administrations or similar	0.4%	0.1%	0.3%	0.3%	<b>0.3%</b>
Others	2.8%	1.9%	1.9%	2.0%	<b>2.2%</b>

\* Multi-choice question

## Other expenses

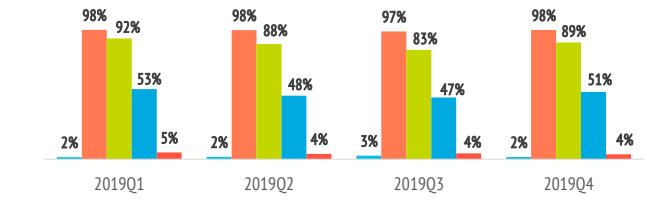
	2019Q1	2019Q2	2019Q3	2019Q4	TOTAL
Restaurants or cafes	56.0%	48.5%	42.5%	50.2%	<b>50.0%</b>
Supermarkets	52.7%	51.9%	48.8%	47.1%	<b>50.1%</b>
Car rental	35.1%	33.5%	28.8%	31.8%	<b>32.6%</b>
Organized excursions	20.8%	25.3%	30.6%	24.0%	<b>24.6%</b>
Taxi, transfer, chauffeur service	51.5%	57.1%	64.1%	54.5%	<b>56.1%</b>
Theme Parks	5.6%	7.5%	5.8%	5.2%	<b>5.9%</b>
Sport activities	6.3%	6.7%	7.6%	6.0%	<b>6.5%</b>
Museums	5.3%	5.6%	5.3%	5.8%	<b>5.5%</b>
Flights between islands	3.3%	3.3%	3.3%	3.0%	<b>3.2%</b>

## Activities in the Canary Islands

Outdoor time per day	2019Q1	2019Q2	2019Q3	2019Q4	2019
0 hours	1.5%	1.7%	2.7%	1.6%	<b>1.8%</b>
1 - 2 hours	6.5%	10.5%	14.1%	9.5%	<b>9.7%</b>
3 - 6 hours	38.6%	39.4%	36.2%	37.6%	<b>38.0%</b>
7 - 12 hours	48.3%	44.3%	42.5%	47.5%	<b>46.1%</b>
More than 12 hours	5.1%	4.0%	4.5%	3.7%	<b>4.4%</b>

### TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION

0 hours More than 1 hour More than 3 hours More than 7 hours More than 12 hours



## Where do they stay?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
1-2-3* Hotel	12.1%	15.7%	16.7%	11.9%	<b>13.7%</b>
4* Hotel	43.9%	45.6%	49.8%	46.4%	<b>46.1%</b>
5* Hotel / 5* Luxury Hotel	6.2%	8.7%	7.6%	8.7%	<b>7.7%</b>
Aparthotel / Tourist Villa	15.7%	13.4%	13.8%	15.9%	<b>14.9%</b>
House/room rented in a private dwelling	6.8%	5.2%	3.7%	6.4%	<b>5.7%</b>
Private accommodation <sup>(1)</sup>	6.5%	5.9%	5.2%	5.3%	<b>5.8%</b>
Others (Cottage, cruise, camping,..)	8.7%	5.6%	3.2%	5.4%	<b>6.0%</b>

(1) Own property /House of friends or relatives / Free housing exchange / Other private accommodation.

## What do they book?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Room only	21.9%	14.5%	11.4%	17.3%	<b>16.9%</b>
Bed and Breakfast	8.7%	7.7%	5.4%	8.2%	<b>7.7%</b>
Half board	29.3%	33.6%	30.8%	32.3%	<b>31.4%</b>
Full board	4.5%	4.1%	3.5%	3.3%	<b>3.9%</b>
All inclusive	35.5%	40.0%	48.8%	39.0%	<b>40.2%</b>

“

40.2% of Germans book all inclusive.



35.5%

2019Q1



48.8%

2019Q3



40.0%

2019Q2



39.0%

2019Q4

Beauty and health treatments  
Taste Canarian gastronomy  
Wineries Activities at sea  
Sea excursions Nature activities  
Sport activities Theme parks  
Nightlife  
Museums  
Organized excursions  
Astronomical observation

\* Multi-choice question

## TOURIST PROFILE BY QUARTER OF TRIP (2019)

### GERMANY



#### Which island do they choose?

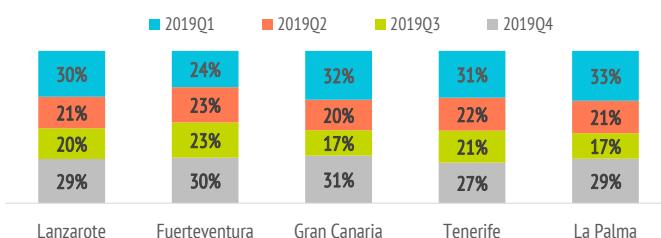
Tourists (> 15 years old)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	82,646	57,088	55,227	79,656	<b>274,617</b>
Fuerteventura	144,612	140,708	140,922	181,482	<b>607,724</b>
Gran Canaria	249,180	156,377	129,692	243,468	<b>778,717</b>
Tenerife	177,546	125,346	121,375	154,275	<b>578,542</b>
La Palma	30,406	19,799	15,612	27,103	<b>92,920</b>

Share by islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
Lanzarote	12.1%	11.4%	11.9%	11.6%	<b>11.8%</b>
Fuerteventura	21.1%	28.2%	30.4%	26.5%	<b>26.1%</b>
Gran Canaria	36.4%	31.3%	28.0%	35.5%	<b>33.4%</b>
Tenerife	25.9%	25.1%	26.2%	22.5%	<b>24.8%</b>
La Palma	4.4%	4.0%	3.4%	4.0%	<b>4.0%</b>

#### How many islands do they visit during their trip?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
One island	89.0%	90.5%	92.4%	91.8%	<b>90.8%</b>
Two islands	5.6%	7.0%	6.5%	5.8%	<b>6.2%</b>
Three or more islands	5.3%	2.5%	1.0%	2.3%	<b>3.0%</b>

#### % TOURISTS BY ISLAND AND QUARTER OF TRIP



#### • MOST VISITED PLACES IN EACH ISLAND •



49% MONTAÑA DEL FUEGO



47% PLAYAS DE JANDÍA



66% DUNAS DE MASPALOMAS



57% PARQUE NACIONAL DEL TEIDE



76% LOS LLANOS DE ARIDANE

#### Internet usage during their trip

	2019Q1	2019Q2	2019Q3	2019Q4	2019
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##### Research

- Tourist package	14.7%	15.6%	19.5%	16.5%	<b>16.4%</b>
- Flights	11.7%	13.1%	15.7%	13.6%	<b>13.4%</b>
- Accommodation	17.1%	19.3%	25.2%	20.3%	<b>20.1%</b>
- Transport	14.7%	15.7%	18.0%	15.8%	<b>15.9%</b>
- Restaurants	24.8%	22.9%	19.8%	24.1%	<b>23.1%</b>
- Excursions	30.4%	28.3%	33.0%	29.8%	<b>30.3%</b>
- Activities	31.8%	29.5%	34.9%	32.1%	<b>32.0%</b>

##### Book or purchase

- Tourist package	42.9%	42.3%	45.4%	43.4%	<b>43.4%</b>
- Flights	56.5%	49.8%	42.5%	51.7%	<b>50.8%</b>
- Accommodation	44.8%	39.2%	33.4%	39.7%	<b>39.8%</b>
- Transport	36.4%	32.5%	27.7%	35.7%	<b>33.5%</b>
- Restaurants	6.3%	6.7%	7.5%	6.7%	<b>6.8%</b>
- Excursions	9.5%	11.5%	13.0%	12.4%	<b>11.5%</b>
- Activities	10.7%	11.1%	13.0%	10.5%	<b>11.3%</b>

\* Multi-choice question

#### Internet usage in the Canary Islands

Internet usage in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
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#### Did not use the Internet

<b>11.5%</b>	<b>7.7%</b>	<b>4.3%</b>	<b>6.8%</b>	<b>7.9%</b>
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#### Used the Internet

<b>88.5%</b>	<b>92.3%</b>	<b>95.7%</b>	<b>93.2%</b>	<b>92.1%</b>
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#### - Own Internet connection

32.1%	35.1%	32.8%	32.1%	32.9%
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#### - Free Wifi connection

41.9%	43.5%	49.2%	46.2%	44.9%
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#### Applications\*

- Search for locations or maps	61.0%	60.6%	64.4%	62.8%	<b>62.2%</b>
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- Search for destination info	47.0%	46.4%	49.7%	47.8%	<b>47.6%</b>
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- Share pictures or trip videos	50.9%	56.5%	60.4%	54.2%	<b>55.0%</b>
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- Download tourist apps	7.0%	6.8%	8.1%	8.3%	<b>7.6%</b>
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- Others	24.9%	25.7%	20.2%	20.8%	<b>22.9%</b>
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\* Multi-choice question

#### How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
Average rating	8.66	8.67	8.58	8.63	<b>8.64</b>

#### Experience in the Canary Islands

Experience in the Canary Islands	2019Q1	2019Q2	2019Q3	2019Q4	2019
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Worse or much worse than expected	1.4%	1.4%	1.7%	0.9%	<b>1.3%</b>
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Lived up to expectations	55.2%	57.3%	52.4%	57.5%	<b>55.8%</b>
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Better or much better than expected	43.3%	41.3%	45.8%	41.6%	<b>42.9%</b>
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#### Future intentions (scale 1-10)

Future intentions (scale 1-10)	2019Q1	2019Q2	2019Q3	2019Q4	2019
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Return to the Canary Islands	8.88	8.67	8.34	8.77	<b>8.70</b>
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Recommend visiting the Canary Islands	9.01	8.92	8.81	9.01	<b>8.95</b>
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#### How many are loyal to the Canary Islands?

2019Q1	2019Q2	2019Q3	2019Q4	2019
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<b>Repeat tourists</b>	<b>76.0%</b>	<b>73.4%</b>	<b>62.4%</b>	<b>78.6%</b>
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<b>Repeat tourists</b>	<b>73.1%</b>	<b>69.3%</b>	<b>55.4%</b>	<b>74.9%</b>	<b>69.4%</b>
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<b>Repeat tourists</b>	<b>22.1%</b>	<b>19.9%</b>	<b>10.3%</b>	<b>22.6%</b>	<b>19.4%</b>
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<b>At least 10 previous visits</b>	<b>21.2%</b>	<b>21.5%</b>	<b>10.3%</b>	<b>23.5%</b>	<b>19.8%</b>
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#### REPEAT TOURISTS

76.0%	73.4%	62.4%	78.6%	Average 73.5%
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## TOURIST PROFILE BY QUARTER OF TRIP (2019)

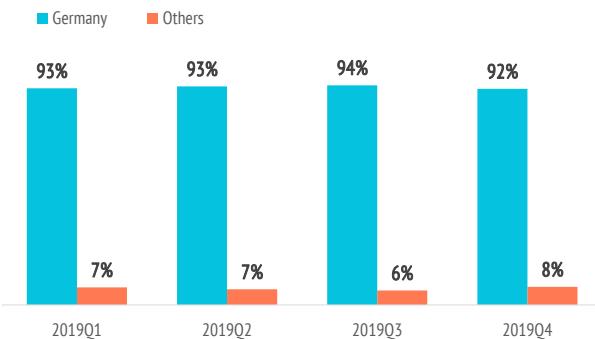
### GERMANY



#### Where does the flight come from?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Germany	92.5%	93.3%	93.8%	92.3%	<b>92.9%</b>
Spanish Mainland	3.0%	2.8%	1.9%	3.0%	<b>2.8%</b>
Switzerlands	1.9%	2.1%	2.6%	2.1%	<b>2.1%</b>
Others	2.6%	1.8%	1.6%	2.6%	<b>2.2%</b>

#### % TOURISTS BY QUARTER OF TRIP



#### Who do they come with?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Unaccompanied	11.2%	10.6%	7.9%	11.2%	<b>10.4%</b>
Only with partner	56.3%	51.6%	45.6%	55.5%	<b>53.0%</b>
Only with children (< 13 years old)	3.7%	5.7%	7.9%	4.5%	<b>5.2%</b>
Partner + children (< 13 years old)	4.7%	5.5%	7.9%	4.1%	<b>5.3%</b>
Other relatives	5.0%	6.1%	5.3%	5.9%	<b>5.6%</b>
Friends	6.8%	5.9%	5.6%	5.0%	<b>5.8%</b>
Work colleagues	0.5%	0.6%	0.1%	0.1%	<b>0.3%</b>
Organized trip	0.5%	0.1%	0.1%	0.6%	<b>0.4%</b>
Other combinations <sup>(1)</sup>	11.2%	14.0%	19.7%	13.2%	<b>14.1%</b>

<sup>(1)</sup> Different situations have been isolated

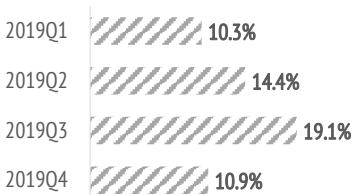
Tourists with children	10.3%	14.4%	19.1%	10.9%	13.1%
- Between 0 and 2 years old	1.9%	1.5%	1.0%	0.8%	1.3%
- Between 3 and 12 years old	7.4%	11.5%	17.5%	9.3%	10.8%
- Between 0 -2 and 3-12 years	1.1%	1.3%	0.6%	0.8%	1.0%
Tourists without children	89.7%	85.6%	80.9%	89.1%	86.9%
Group composition:					
- 1 person	15.2%	13.8%	9.8%	13.5%	<b>13.4%</b>
- 2 people	64.0%	60.5%	54.5%	64.2%	<b>61.4%</b>
- 3 people	9.6%	11.9%	17.6%	10.5%	<b>11.9%</b>
- 4 or 5 people	9.7%	12.1%	16.6%	10.1%	<b>11.7%</b>
- 6 or more people	1.5%	1.7%	1.4%	1.6%	<b>1.6%</b>
Average group size:	2.22	2.33	2.51	2.28	2.32

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13.4% of Germans travel with children.

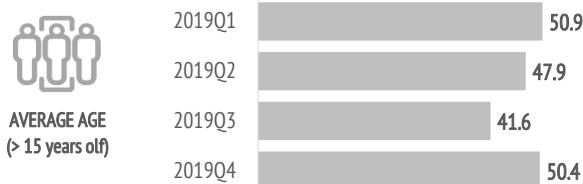


(under the age of 13)



#### Who are they?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
<u>Gender</u>					
Men	52.6%	50.2%	51.7%	54.6%	<b>52.5%</b>
Women	47.4%	49.8%	48.3%	45.4%	<b>47.5%</b>
<u>Age</u>					
Average age (tourist > 15 years old)	50.9	47.9	41.6	50.4	<b>48.3</b>
Standard deviation	16.0	15.9	14.4	14.8	<b>15.7</b>
<u>Age range (&gt; 15 years old)</u>					
16 - 24 years old	5.5%	7.6%	14.9%	3.7%	<b>7.2%</b>
25 - 30 years old	8.9%	11.4%	14.0%	8.9%	<b>10.5%</b>
31 - 45 years old	22.2%	24.3%	28.7%	22.7%	<b>24.1%</b>
46 - 60 years old	31.9%	32.7%	33.4%	39.3%	<b>34.5%</b>
Over 60 years old	31.5%	24.0%	9.2%	25.4%	<b>23.7%</b>
<u>Occupation</u>					
Salaried worker	45.9%	58.1%	67.6%	59.9%	<b>56.9%</b>
Self-employed	9.5%	11.7%	7.0%	11.7%	<b>10.1%</b>
Unemployed	0.3%	0.6%	0.4%	0.3%	<b>0.4%</b>
Business owner	14.6%	10.2%	11.8%	9.8%	<b>11.7%</b>
Student	3.9%	2.8%	5.9%	1.8%	<b>3.4%</b>
Retired	24.3%	14.4%	6.3%	14.8%	<b>15.8%</b>
Unpaid domestic work	0.5%	0.3%	0.9%	0.5%	<b>0.5%</b>
Others	1.1%	1.9%	0.2%	1.1%	<b>1.1%</b>
<u>Annual household income level</u>					
Less than €25,000	11.7%	9.6%	12.8%	10.4%	<b>11.1%</b>
€25,000 - €49,999	40.5%	38.9%	36.6%	34.8%	<b>37.7%</b>
€50,000 - €74,999	24.4%	27.3%	27.2%	28.0%	<b>26.6%</b>
More than €74,999	23.5%	24.1%	23.3%	26.8%	<b>24.6%</b>
<u>Education level</u>					
No studies	0.7%	0.5%	0.5%	0.5%	<b>0.6%</b>
Primary education	3.8%	4.4%	3.2%	3.9%	<b>3.8%</b>
Secondary education	23.6%	28.4%	27.5%	25.7%	<b>26.0%</b>
Higher education	72.0%	66.7%	68.8%	69.9%	<b>69.6%</b>



#### % OF TOURISTS WITH INCOMES OVER €74,999



#### % SALARIED WORKED TOURISTS

