

# TOURIST PROFILE BY ISLAND OF STAY (2022)

## GERMANY



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



	LZ	FUE	GC	TFE	LP
<b>TOURISTS</b>					
<b>Tourist arrivals (FRONTUR) (*)</b>	<b>226</b>	<b>675</b>	<b>692</b>	<b>614</b>	<b>38</b>
<b>Tourist arrivals &gt; 15 years old (EGT) (*)</b>	<b>203</b>	<b>599</b>	<b>635</b>	<b>554</b>	<b>36</b>
- book holiday package (*)	111	488	419	263	19
- do not book holiday package (*)	92	111	216	291	17
- % tourists who book holiday package	54.7%	81.4%	66.0%	47.5%	53.5%

(\*) Thousands of tourists



	LZ	FUE	GC	TFE	LP
<b>Expenditure per tourist (€)</b>	<b>1,485</b>	<b>1,505</b>	<b>1,445</b>	<b>1,530</b>	<b>1,271</b>
- book holiday package	1,592	1,504	1,555	1,674	1,306
- holiday package	1,361	1,358	1,304	1,365	1,040
- others	231	146	251	309	266
- do not book holiday package	1,356	1,508	1,231	1,399	1,229
- flight	358	389	347	404	362
- accommodation	490	653	419	448	447
- others	509	466	466	547	421
<b>Average length of stay</b>	<b>10.90</b>	<b>10.49</b>	<b>10.91</b>	<b>12.13</b>	<b>11.29</b>
- book holiday package	9.61	9.99	9.58	10.09	9.96
- do not book holiday package	12.47	12.68	13.49	13.98	12.83
<b>Average daily expenditure (€)</b>	<b>160.3</b>	<b>154.4</b>	<b>153.9</b>	<b>151.0</b>	<b>128.3</b>
- book holiday package	180.1	159.3	174.2	180.7	144.6
- do not book holiday package	136.4	133.2	114.4	124.0	109.5
<b>Total turnover (&gt; 15 years old) (€m)</b>	<b>302</b>	<b>902</b>	<b>918</b>	<b>847</b>	<b>45</b>
- book holiday package	177	734	652	440	25
- do not book holiday package	125	168	266	407	20

### Where did they spend their main holiday last year?\*

	LZ	FUE	GC	TFE	LP
Didn't have holidays	24.6%	26.5%	26.1%	24.4%	31.9%
Canary Islands	21.7%	21.9%	24.4%	21.4%	19.5%
Other destination	53.8%	51.6%	49.5%	54.2%	48.6%

### What other destinations did they consider for this trip?\*

	LZ	FUE	GC	TFE	LP
None (I was clear about "this Canary Island")	27.0%	24.4%	27.9%	32.9%	26.7%
Canary Islands (other island)	30.4%	25.8%	29.2%	24.8%	24.7%
Other destination	42.6%	49.8%	42.9%	42.3%	48.6%

\*Percentage of valid answers

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.

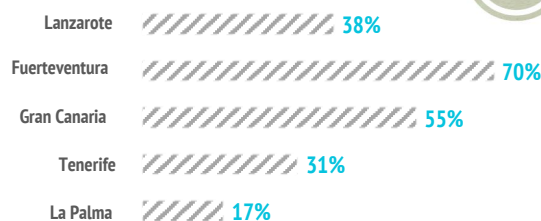
### Importance of each factor in the destination choice



	LZ	FUE	GC	TFE	LP
Climate	74.0%	76.5%	75.4%	72.4%	73.1%
Sea	57.8%	75.7%	64.3%	54.2%	44.4%
Safety	47.3%	57.3%	56.4%	47.7%	43.6%
Tranquility	42.5%	60.0%	49.7%	43.8%	54.4%
Beaches	38.4%	70.3%	54.9%	31.3%	16.6%
Effortless trip	40.0%	51.3%	49.2%	42.0%	40.4%
European belonging	41.4%	43.4%	44.1%	39.3%	33.5%
Accommodation supply	34.9%	45.2%	43.3%	31.9%	27.2%
Landscapes	41.6%	20.5%	33.7%	49.7%	69.6%
Price	22.3%	32.0%	30.0%	24.4%	20.6%
Gastronomy	23.7%	22.7%	31.5%	28.2%	27.3%
Environment	25.9%	18.8%	23.8%	31.0%	39.3%
Authenticity	21.8%	16.5%	19.6%	19.9%	33.3%
Fun possibilities	12.9%	19.5%	20.5%	16.4%	9.5%
Hiking trail network	10.1%	5.2%	10.5%	19.0%	47.8%
Shopping	5.3%	8.1%	14.4%	8.5%	5.1%
Culture	11.2%	4.6%	10.0%	7.0%	4.7%
Exoticism	6.5%	6.6%	7.3%	8.4%	6.5%
Historical heritage	8.7%	4.1%	7.6%	6.9%	6.0%
Nightlife	2.2%	3.4%	8.6%	2.5%	0.7%

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

### % TOURISTS WHO CHOOSE BEACHES



### What is the main motivation for their holidays?\*

	LZ	FUE	GC	TFE	LP
Rest	39.0%	54.3%	56.0%	33.0%	27.4%
Enjoy family time	8.7%	11.8%	9.7%	12.1%	6.6%
Have fun	6.1%	9.7%	7.7%	7.2%	6.3%
Explore the destination	40.3%	17.2%	22.6%	41.7%	54.2%
Practice their hobbies	4.6%	3.9%	1.2%	2.7%	2.3%
Other reasons	1.3%	3.1%	2.8%	3.3%	3.1%

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

	LZ	FUE	GC	TFE	LP
The same day	0.2%	1.0%	0.8%	0.6%	0.2%
Between 1 and 30 days	24.9%	30.9%	32.7%	22.6%	27.3%
Between 1 and 2 months	21.9%	23.8%	24.4%	22.9%	28.7%
Between 3 and 6 months	36.5%	29.0%	28.2%	34.4%	34.2%
More than 6 months	16.5%	15.2%	13.9%	19.4%	9.6%

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## GERMANY



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

	LZ	FUE	GC	TFE	LP
Previous visits to the Canary Islands	48.9%	47.6%	44.3%	48.4%	50.6%
Friends or relatives	23.0%	17.8%	25.6%	34.3%	23.1%
Internet or social media	58.4%	53.2%	48.7%	54.7%	71.7%
Mass Media	2.3%	2.6%	2.2%	3.0%	4.2%
Travel guides and magazines	13.1%	7.1%	8.5%	13.1%	24.5%
Travel Blogs or Forums	6.0%	5.1%	4.2%	7.1%	11.7%
Travel TV Channels	0.6%	1.4%	1.2%	1.4%	6.8%
Tour Operator or Travel Agency	26.5%	30.4%	26.2%	21.7%	20.5%
Public administrations or similar	0.2%	0.6%	0.4%	0.8%	0.3%
Others	1.5%	1.6%	3.3%	3.1%	1.4%

\* Multi-choise question

### With whom did they book their flight and accomodation?

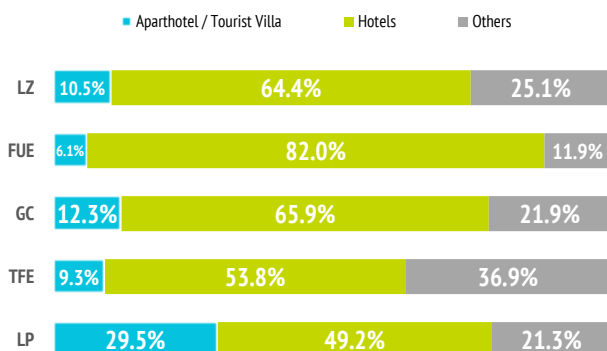
	LZ	FUE	GC	TFE	LP
<b>Flight</b>					
- Directly with the airline	39.3%	20.9%	31.5%	43.7%	45.2%
- Tour Operator or Travel Agency	60.7%	79.1%	68.5%	56.3%	54.8%

	LZ	FUE	GC	TFE	LP
<b>Accommodation</b>					
- Directly with the accommodation	29.8%	15.3%	20.9%	29.4%	28.5%
- Tour Operator or Travel Agency	70.2%	84.7%	79.1%	70.6%	71.5%

### Where do they stay?

	LZ	FUE	GC	TFE	LP
1-2-3* Hotel	14.4%	16.6%	9.7%	9.3%	5.3%
4* Hotel	37.9%	60.8%	42.9%	35.5%	43.8%
5* Hotel / 5* Luxury Hotel	12.1%	4.6%	13.2%	9.0%	--
Aparthotel / Tourist Villa	10.5%	6.1%	12.3%	9.3%	29.5%
House/room rented in a private dwelling	12.1%	5.5%	7.3%	14.5%	5.6%
Private accommodation (1)	6.6%	2.5%	8.2%	13.2%	8.4%
Others (Cottage, cruise, camping,...)	6.4%	3.9%	6.4%	9.1%	7.3%

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



### What do they book?

	LZ	FUE	GC	TFE	LP
Room only	24.1%	10.3%	20.9%	29.3%	40.1%
Bed and Breakfast	7.2%	2.3%	9.0%	12.0%	10.7%
Half board	24.5%	16.8%	31.1%	30.4%	29.3%
Full board	1.1%	5.0%	2.6%	2.7%	3.4%
All inclusive	43.2%	65.6%	36.4%	25.6%	16.5%

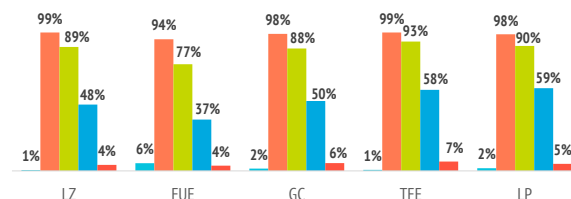
### Other expenses

	LZ	FUE	GC	TFE	LP
Restaurants or cafes	64.6%	36.0%	58.3%	69.6%	70.2%
Supermarkets	61.1%	40.8%	55.4%	63.9%	80.6%
Car rental	51.6%	24.6%	23.8%	53.4%	73.9%
Organized excursions	32.2%	18.6%	21.1%	38.2%	29.4%
Taxi, transfer, chauffeur service	47.4%	64.8%	59.2%	46.2%	42.8%
Theme Parks	5.9%	3.9%	4.0%	19.1%	1.9%
Sport activities	9.3%	8.4%	5.3%	9.8%	6.6%
Museums	18.5%	1.3%	4.5%	5.5%	7.4%
Flights between islands	5.4%	2.9%	2.1%	5.5%	5.8%

### Activities in the Canary Islands

	LZ	FUE	GC	TFE	LP
<b>Outdoor time per day</b>					
0 hours	0.7%	5.5%	1.6%	0.7%	1.9%
1 - 2 hours	10.4%	17.9%	10.6%	6.5%	8.4%
3 - 6 hours	41.3%	39.7%	37.6%	34.7%	30.2%
7 - 12 hours	43.3%	33.0%	44.5%	51.4%	54.4%
More than 12 hours	4.3%	3.8%	5.6%	6.7%	5.0%

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



### Activities in the Canary Islands

	LZ	FUE	GC	TFE	LP
Beach	80.9%	85.6%	82.5%	77.0%	68.5%
Walk, wander	58.0%	44.9%	50.1%	69.5%	84.9%
Explore the island on their own	64.0%	39.9%	49.3%	64.2%	73.9%
Swimming pool, hotel facilities	41.7%	46.2%	42.6%	40.7%	28.7%
Taste Canarian gastronomy	39.9%	19.4%	31.2%	44.4%	41.8%
Hiking	20.9%	12.0%	14.8%	29.8%	53.2%
Organized excursions	20.8%	13.3%	14.1%	23.9%	16.9%
Sea excursions / whale watching	9.8%	12.8%	12.4%	19.9%	10.5%
Theme parks	7.5%	6.2%	8.1%	23.8%	2.0%
Other Nature Activities	16.0%	7.2%	10.7%	14.7%	14.3%
Wineries / markets / popular festi	25.8%	5.6%	8.2%	11.0%	23.3%
Museums / exhibitions	27.0%	2.9%	10.3%	10.9%	17.1%
Nightlife / concerts / shows	6.7%	6.0%	16.5%	6.7%	2.3%
Swim	5.0%	6.5%	7.5%	8.6%	2.5%
Astronomical observation	5.7%	6.1%	3.2%	7.6%	15.6%
Practice other sports	4.7%	6.4%	5.0%	6.1%	4.4%
Beauty and health treatments	4.5%	3.6%	5.6%	6.4%	1.6%
Cycling / Mountain bike	10.6%	3.7%	4.8%	1.6%	6.5%
Surf	3.6%	5.9%	3.3%	3.0%	0.4%
Scuba Diving	5.5%	3.3%	3.4%	4.4%	4.1%
Running	3.8%	2.2%	2.3%	2.4%	2.0%
Windsurf / Kitesurf	0.7%	3.2%	0.5%	1.6%	0.2%
Golf	0.8%	1.5%	1.9%	1.5%	0.0%

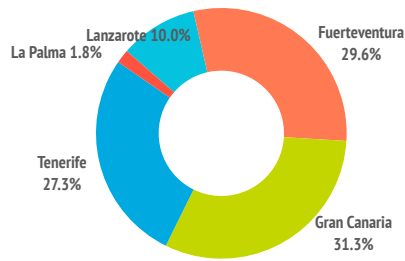
\* Multi-choise question

# TOURIST PROFILE BY ISLAND OF STAY (2022)

## GERMANY



### Which island do they choose?

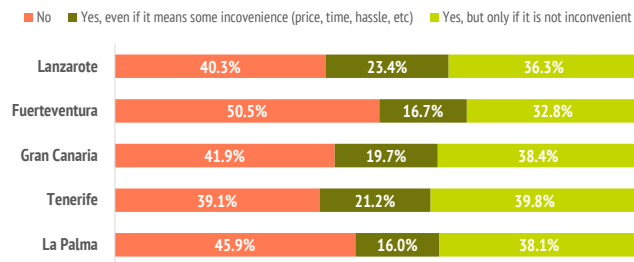


### How many islands do they visit during their trip?

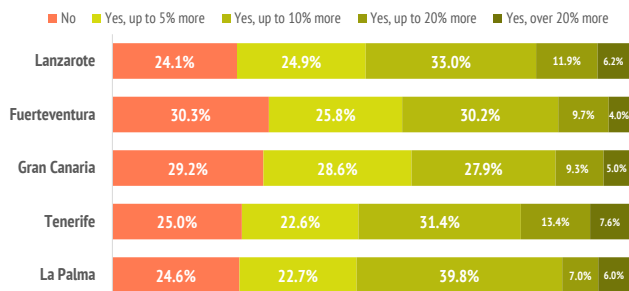
	LZ	FUE	GC	TFE	LP
One island	92.7%	94.6%	95.1%	91.7%	82.1%
Two islands	6.4%	4.5%	3.7%	6.4%	16.4%
Three or more islands	0.9%	0.9%	1.2%	1.9%	1.5%

### Sustainable destination

#### When booking a trip, do they tend to choose the most sustainable options?



#### Would they be willing to spend more on travel to reduce their carbon footprint?



#### Perception during their stay\*

	LZ	FUE	GC	TFE	LP
Quality of life on the island	7.88	7.73	7.99	7.98	8.19
Tolerance towards tourism	8.59	8.61	8.57	8.37	8.70
Cleanliness of the island	8.33	7.86	7.78	7.80	8.45
Air quality	8.67	8.61	8.41	8.36	9.01
Rational water consumption	6.99	6.95	7.07	6.85	7.33
Energy saving	6.41	6.43	6.60	6.25	6.56
Use of renewable energy	6.38	6.44	7.11	6.38	6.02
Recycling	6.47	6.74	6.66	6.36	6.17
Easy to get around by public transport	6.69	6.53	7.55	7.12	7.10
Overcrowding in tourist areas	5.46	5.71	6.12	5.71	5.27
Supply of local products	6.94	6.57	6.91	6.90	7.48

\* Scale 0 - 10 (0 = Not important and 10 = Very important)

### Which is the most visited place on each island?



The data refers to % of tourists on each island who have visited the place.

### How do they rate the Canary Islands?

Satisfaction (scale 0-10)	LZ	FUE	GC	TFE	LP
Average rating	8.80	8.73	8.72	8.77	9.16

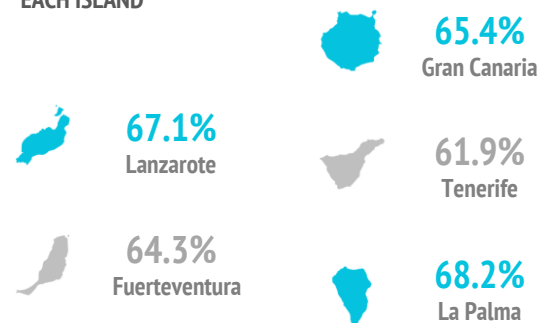
Experience in the Canary Islands	LZ	FUE	GC	TFE	LP
Worse or much worse than expected	1.8%	1.8%	2.1%	1.5%	1.7%
Lived up to expectations	52.8%	60.0%	53.0%	51.8%	59.2%
Better or much better than expected	45.5%	38.2%	45.0%	46.8%	39.2%

Future intentions (scale 1-10)	LZ	FUE	GC	TFE	LP
Return to the Canary Islands	8.80	8.60	8.70	8.78	9.14
Recommend visiting the Canary Islands	9.08	8.92	8.91	9.11	9.42

### How many are loyal to the Canary Islands?

	LZ	FUE	GC	TFE	LP
Repeat tourists of the island	67.1%	64.3%	65.4%	61.9%	68.2%
At least 10 previous visits	10.8%	10.8%	11.4%	9.4%	7.5%
Repeat tourists	74.1%	69.7%	71.3%	68.0%	72.9%
At least 10 previous visits	20.3%	18.2%	20.7%	16.7%	21.1%

### REPEAT TOURIST OF EACH ISLAND



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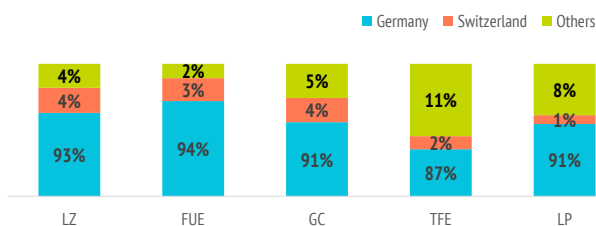


### Where does the flight come from?



	LZ	FUE	GC	TFE	LP
Germany	92.6%	94.4%	91.2%	87.1%	90.9%
Switzerland	3.8%	3.5%	3.7%	2.0%	1.3%
Mainland Spain	1.0%	0.4%	1.7%	6.2%	4.2%
Luxembourg	0.8%	0.9%	1.1%	1.4%	--
Portugal	--	0.2%	1.8%	1.0%	--
Netherlands	1.1%	0.0%	--	0.8%	--
Austria	0.0%	0.1%	0.1%	0.5%	--

### SHARE OF TOURIST BY ORIGIN OF THE FLIGHT



### Who do they come with?



	LZ	FUE	GC	TFE	LP
Unaccompanied	9.1%	9.5%	14.6%	10.9%	10.6%
Only with partner	46.5%	50.6%	49.5%	50.0%	55.7%
Only with children (< 13 years old)	7.2%	7.0%	4.3%	4.5%	5.1%
Partner + children (< 13 years old)	7.6%	5.6%	3.8%	6.9%	3.2%
Other relatives	4.7%	5.1%	6.9%	7.8%	5.5%
Friends	5.6%	7.5%	7.8%	6.3%	6.6%
Work colleagues	0.1%	0.0%	0.1%	0.7%	0.1%
Organized trip	0.3%	0.1%	0.2%	0.1%	0.6%
Other combinations <sup>(1)</sup>	18.9%	14.5%	12.7%	12.9%	12.6%

(1) Different situations have been isolated

Tourists with children	LZ	FUE	GC	TFE	LP
- Between 0 and 2 years old	0.6%	1.3%	0.7%	1.3%	0.6%
- Between 3 and 12 years old	17.1%	13.2%	8.8%	12.7%	9.5%
- Between 0-2 and 3-12 years	0.7%	0.9%	0.7%	0.6%	0.7%

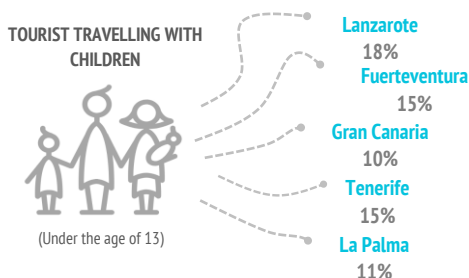
Tourists without children	LZ	FUE	GC	TFE	LP
	81.6%	84.6%	89.8%	85.4%	89.2%

#### Group composition:

- 1 person	11.4%	11.2%	17.3%	12.5%	10.6%
- 2 people	55.3%	60.6%	59.2%	58.5%	65.9%
- 3 people	13.4%	13.3%	9.9%	12.6%	11.8%
- 4 or 5 people	15.9%	13.2%	11.8%	14.2%	11.2%
- 6 or more people	4.0%	1.6%	1.8%	2.2%	0.4%

Average group size:	LZ	FUE	GC	TFE	LP
	2.60	2.38	2.26	2.43	2.28

\*People who share the main expenses of the trip



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.

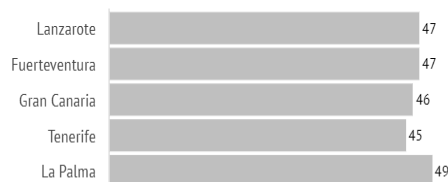
### Who are they?



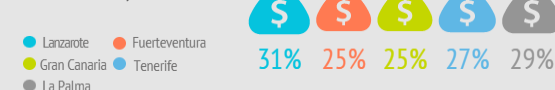
	LZ	FUE	GC	TFE	LP
<b>Gender</b>					
Men	57.2%	47.7%	53.3%	48.5%	43.1%
Women	42.8%	52.3%	46.7%	51.5%	56.9%
<b>Age</b>					
Average age (tourist > 15 years old)	47.4	47.1	46.3	45.2	49.3
Standard deviation	16.4	16.7	17.3	15.8	15.0
<b>Age range (&gt; 15 years old)</b>					
16 - 24 years old	9.0%	10.3%	13.3%	10.4%	5.6%
25 - 30 years old	10.9%	11.6%	11.0%	11.1%	7.0%
31 - 45 years old	26.9%	25.0%	25.7%	32.1%	29.3%
46 - 60 years old	29.6%	29.1%	25.3%	26.6%	34.3%
Over 60 years old	23.6%	24.1%	24.8%	19.7%	23.7%
<b>Occupation</b>					
Salaried worker	58.4%	59.0%	56.7%	59.2%	59.0%
Self-employed	6.3%	6.8%	8.2%	6.9%	6.6%
Unemployed	0.7%	0.2%	0.3%	0.1%	1.1%
Business owner	13.3%	10.8%	10.8%	11.9%	12.0%
Student	3.8%	4.4%	5.4%	4.8%	2.9%
Retired	15.8%	17.6%	17.4%	15.7%	14.9%
Unpaid domestic work	0.4%	0.6%	0.2%	0.7%	2.2%
Others	1.3%	0.5%	1.1%	0.8%	1.3%
<b>Annual household income level</b>					
Less than €25,000	12.1%	11.4%	12.3%	11.4%	9.0%
€25,000 - €49,999	27.7%	33.6%	31.8%	32.5%	38.0%
€50,000 - €74,999	29.5%	30.0%	31.1%	29.5%	24.5%
More than €74,999	30.7%	25.0%	24.8%	26.6%	28.5%
<b>Education level</b>					
No studies	0.6%	0.2%	0.4%	0.3%	0.2%
Primary education	2.6%	3.4%	3.5%	3.1%	0.8%
Secondary education	19.4%	24.1%	25.9%	21.8%	18.3%
Higher education	77.4%	72.3%	70.3%	74.9%	80.7%



AVERAGE AGE (> 15 years old)



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



#### % OF TOURISTS TRAVEL ONLY WITH PARTNER

