

TOURIST PROFILE BY QUARTER OF TRIP (2022)

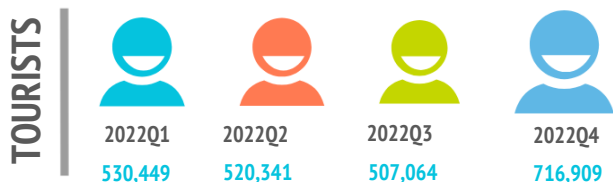
GERMANY

How many are they and how much do they spend?

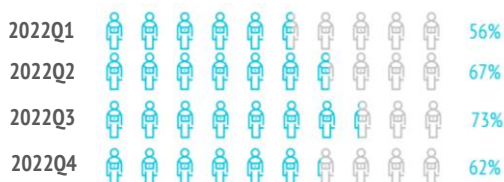


	2022Q1	2022Q2	2022Q3	2022Q4	2022
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.53	0.52	0.51	0.72	2.27
Tourist arrivals > 15 years old (EGT) (*)	0.49	0.48	0.43	0.66	2.05
- book holiday package (*)	0.27	0.32	0.32	0.41	1.32
- do not book holiday package (*)	0.21	0.16	0.12	0.25	0.74
- % tourists who book holiday package	55.9%	66.7%	73.1%	62.4%	64.1%

(*) Million of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE



	2022Q1	2022Q2	2022Q3	2022Q4	2022
Expenditure per tourist (€)	1,425	1,401	1,592	1,532	1,489
- book holiday package	1,510	1,421	1,632	1,648	1,561
- holiday package	1,293	1,226	1,400	1,409	1,339
- others	216	195	232	240	222
- do not book holiday package	1,317	1,360	1,484	1,341	1,361
- flight	316	378	451	399	379
- accommodation	482	463	510	468	478
- others	519	518	524	474	504
Average length of stay	11.86	11.48	10.52	10.87	11.17
- book holiday package	10.08	9.85	9.65	9.85	9.85
- do not book holiday package	14.11	14.73	12.88	12.54	13.52
Average daily expenditure (€)	143.8	139.5	163.8	163.7	153.4
- book holiday package	164.1	151.6	176.8	183.1	170.1
- do not book holiday package	118.0	115.3	128.5	131.4	123.6
Total turnover (> 15 years old) (€m)	693	669	689	1,008	3,059
- book holiday package	410	453	516	676	2,055
- do not book holiday package	282	217	173	332	1,004

Where did they spend their main holiday last year?*

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Didn't have holidays	24.7%	28.1%	32.7%	20.2%	25.7%
Canary Islands	20.1%	22.4%	18.1%	26.6%	22.4%
Other destination	55.2%	49.4%	49.2%	53.2%	52.0%

What other destinations do they consider for this trip?*

	2022Q1	2022Q2	2022Q3	2022Q4	2022
None (I was clear about "this Canary Island")	35.6%	27.9%	17.7%	32.1%	28.0%
Canary Islands (other island)	31.6%	27.7%	21.4%	28.5%	27.1%
Other destination	32.8%	44.4%	60.9%	39.4%	44.9%

*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



	2022Q1	2022Q2	2022Q3	2022Q4	2022
Climate	82.1%	72.4%	60.0%	80.4%	74.6%
Sea	57.5%	65.8%	67.6%	64.5%	63.8%
Safety	50.6%	55.2%	54.0%	52.5%	53.0%
Tranquility	47.8%	52.0%	47.0%	53.6%	50.5%
Beaches	44.2%	50.6%	55.2%	51.6%	50.4%
Effortless trip	46.0%	44.9%	48.9%	46.8%	46.6%
European belonging	46.1%	44.9%	32.5%	43.1%	42.0%
Accommodation supply	33.2%	41.4%	43.4%	39.9%	39.4%
Landscapes	40.3%	35.4%	29.8%	36.7%	35.8%
Price	24.3%	30.0%	32.6%	26.3%	28.0%
Gastronomy	27.1%	26.1%	25.4%	28.8%	27.0%
Environment	29.2%	24.5%	20.2%	25.0%	24.9%
Authenticity	17.7%	19.6%	19.3%	20.1%	19.2%
Fun possibilities	16.0%	19.6%	22.7%	15.2%	18.0%
Hiking trail network	17.4%	12.6%	6.6%	11.5%	12.1%
Shopping	9.1%	9.9%	10.0%	10.1%	9.8%
Culture	7.1%	8.4%	6.7%	7.9%	7.6%
Exoticism	6.9%	8.0%	7.5%	6.9%	7.3%
Historical heritage	6.5%	7.3%	5.6%	6.4%	6.4%
Nightlife	5.1%	3.8%	4.5%	4.7%	4.6%

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?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Rest	44.9%	46.3%	48.9%	47.1%	46.8%
Enjoy family time	8.2%	11.2%	12.4%	11.2%	10.7%
Have fun	6.3%	6.0%	11.1%	8.5%	7.9%
Explore the destination	32.4%	29.6%	23.8%	28.9%	28.8%
Practice their hobbies	4.1%	3.3%	2.0%	2.1%	2.8%
Other reasons	4.1%	3.6%	1.8%	2.2%	2.9%

How far in advance do they book their trip?



	2022Q1	2022Q2	2022Q3	2022Q4	2022
The same day	0.8%	0.9%	0.7%	0.6%	0.7%
Between 1 and 30 days	39.6%	26.6%	22.5%	25.4%	28.5%
Between 1 and 2 months	25.6%	26.0%	19.4%	23.3%	23.6%
Between 3 and 6 months	23.3%	33.8%	37.5%	30.8%	31.1%
More than 6 months	10.7%	12.7%	19.9%	19.8%	16.0%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

TOURIST PROFILE BY QUARTER OF TRIP (2022)

GERMANY

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

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Previous visits to the Canary Islands	47.2%	50.9%	38.7%	49.2%	46.9%
Friends or relatives	29.6%	24.1%	25.3%	23.4%	25.5%
Internet or social media	52.3%	51.4%	59.3%	50.9%	53.1%
Mass Media	3.2%	2.3%	3.0%	2.2%	2.6%
Travel guides and magazines	10.4%	10.9%	10.4%	9.3%	10.2%
Travel Blogs or Forums	4.8%	5.2%	7.2%	5.3%	5.6%
Travel TV Channels	1.6%	1.0%	1.5%	1.2%	1.3%
Tour Operator or Travel Agency	21.3%	28.0%	32.0%	24.5%	26.1%
Public administrations or similar	0.8%	0.3%	0.8%	0.3%	0.5%
Others	2.4%	1.8%	3.0%	2.8%	2.5%

* Multi-choise question

With whom did they book their flight and accommodation?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Flight					
- Directly with the airline	40.7%	31.1%	22.4%	35.1%	32.8%
- Tour Operator or Travel Agency	59.3%	68.9%	77.6%	64.9%	67.2%

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Accommodation					
- Directly with the accommodation	28.0%	20.9%	15.3%	24.3%	22.4%
- Tour Operator or Travel Agency	72.0%	79.1%	84.7%	75.7%	77.6%

Where do they stay?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
1-2-3* Hotel	11.0%	12.4%	13.6%	11.3%	11.9%
4* Hotel	41.8%	47.4%	51.7%	42.1%	45.3%
5* Hotel / 5* Luxury Hotel	8.1%	9.1%	8.4%	10.1%	9.0%
Aparthotel / Tourist Villa	10.7%	9.6%	8.6%	10.2%	9.8%
House/room rented in a private dwelli	11.3%	7.8%	7.1%	10.1%	9.2%
Private accommodation ⁽¹⁾	8.3%	6.8%	5.6%	9.2%	7.7%
Others (Cottage, cruise, camping,...)	8.8%	6.9%	5.0%	7.1%	7.0%

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

What do they book?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Room only	25.8%	18.1%	13.6%	23.0%	20.5%
Bed and Breakfast	9.7%	6.1%	5.1%	8.3%	7.4%
Half board	23.7%	28.9%	27.5%	22.9%	25.5%
Full board	2.8%	3.4%	2.9%	4.1%	3.4%
All inclusive	37.9%	43.6%	50.9%	41.7%	43.3%

“
43.3% of tourists book all inclusive.



37.9%
2022Q1



50.9%
2022Q3



43.6%
2022Q2



41.7%
2022Q4

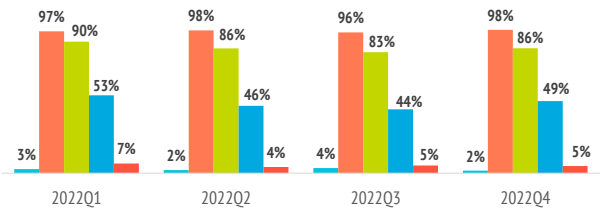
Other expenses

	2022Q1	2022Q2	2022Q3	2022Q4	TOTAL
Restaurants or cafes	58.5%	55.7%	51.1%	56.5%	55.7%
Supermarkets	53.4%	50.8%	56.6%	56.3%	54.4%
Car rental	35.6%	34.3%	35.1%	37.7%	35.9%
Organized excursions	21.1%	24.0%	34.3%	27.3%	26.5%
Taxi, transfer, chauffeur service	51.9%	57.3%	63.2%	53.2%	56.0%
Theme Parks	4.9%	7.8%	12.5%	8.0%	8.2%
Sport activities	6.3%	7.2%	10.4%	7.8%	7.8%
Museums	4.9%	5.1%	5.0%	5.7%	5.2%
Flights between islands	5.0%	3.8%	4.2%	3.2%	4.0%

Activities in the Canary Islands

Outdoor time per day	2022Q1	2022Q2	2022Q3	2022Q4	2022
0 hours	2.7%	2.1%	3.5%	1.7%	2.4%
1 - 2 hours	7.1%	12.4%	13.5%	12.7%	11.5%
3 - 6 hours	36.9%	39.3%	39.2%	36.3%	37.7%
7 - 12 hours	46.7%	42.0%	38.5%	44.5%	43.1%
More than 12 hours	6.7%	4.2%	5.3%	4.9%	5.2%

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



Activities in the Canary Islands	2022Q1	2022Q2	2022Q3	2022Q4	2022
Beach	76.1%	78.7%	89.5%	81.7%	81.3%
Walk, wander	61.8%	54.6%	48.7%	55.8%	55.4%
Explore the island on their own	52.9%	52.1%	52.9%	52.7%	52.6%
Swimming pool, hotel facilities	32.7%	43.2%	51.4%	43.3%	42.4%
Taste Canarian gastronomy	34.8%	29.8%	30.4%	33.9%	32.4%
Hiking	24.2%	18.7%	15.4%	19.7%	19.6%
Organized excursions	13.0%	15.7%	25.3%	16.7%	17.4%
Sea excursions / whale watching	9.9%	13.1%	21.9%	13.6%	14.3%
Theme parks	7.1%	12.2%	16.8%	10.9%	11.5%
Other Nature Activities	11.2%	9.3%	12.5%	12.4%	11.4%
Wineries / markets / popular festi	9.0%	10.5%	11.2%	10.3%	10.2%
Museums / exhibitions	9.4%	8.5%	9.6%	11.8%	10.0%
Nightlife / concerts / shows	9.0%	8.5%	10.7%	9.6%	9.4%
Swim	18.7%	3.1%	4.0%	3.7%	7.2%
Astronomical observation	5.9%	4.8%	7.3%	5.4%	5.8%
Practice other sports	5.9%	4.0%	7.3%	5.5%	5.6%
Beauty and health treatments	4.8%	4.9%	5.1%	5.3%	5.0%
Cycling / Mountain bike	6.5%	3.7%	3.1%	3.6%	4.2%
Surf	4.5%	3.7%	4.7%	3.2%	3.9%
Scuba Diving	2.5%	3.2%	6.7%	3.4%	3.9%
Running	3.6%	1.8%	2.4%	2.1%	2.4%
Windsurf / Kitesurf	1.7%	1.5%	1.9%	1.4%	1.6%
Golf	1.5%	2.5%	1.5%	1.0%	1.6%

* Multi-choise question

TOURIST PROFILE BY QUARTER OF TRIP (2022) GERMANY

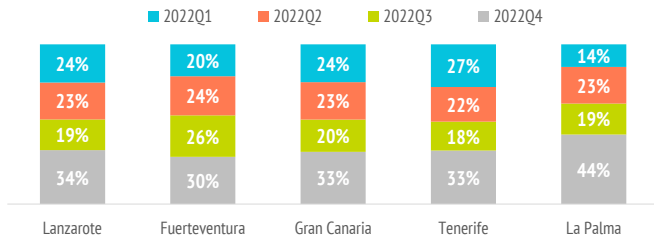


Which island do they choose?

Tourists (> 15 years old)	2022Q1	2022Q2	2022Q3	2022Q4	2022
Lanzarote	48,588	47,013	39,107	68,542	203,250
Fuerteventura	119,920	146,548	155,579	177,007	599,054
Gran Canaria	150,431	148,741	128,461	207,524	635,157
Tenerife	147,986	120,192	100,126	185,503	553,807
La Palma	5,051	8,203	6,908	15,562	35,724

Share by islands	2022Q1	2022Q2	2022Q3	2022Q4	2022
Lanzarote	10.3%	10.0%	9.1%	10.5%	10.0%
Fuerteventura	25.4%	31.1%	36.2%	27.1%	29.6%
Gran Canaria	31.9%	31.6%	29.9%	31.7%	31.3%
Tenerife	31.4%	25.5%	23.3%	28.4%	27.3%
La Palma	1.1%	1.7%	1.6%	2.4%	1.8%

% TOURISTS BY ISLAND AND QUARTER OF TRIP



How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2022Q1	2022Q2	2022Q3	2022Q4	2022
Average rating	8.71	8.77	8.70	8.81	8.75

Experience in the Canary Islands	2022Q1	2022Q2	2022Q3	2022Q4	2022
Worse or much worse than expected	1.3%	1.4%	2.7%	1.8%	1.8%
Lived up to expectations	52.0%	54.1%	55.0%	57.0%	54.7%
Better or much better than expected	46.7%	44.6%	42.3%	41.2%	43.5%

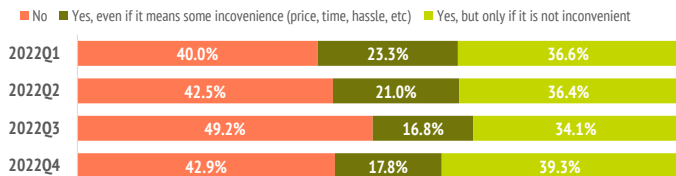
Future intentions (scale 1-10)	2022Q1	2022Q2	2022Q3	2022Q4	2022
Return to the Canary Islands	8.79	8.78	8.39	8.81	8.71
Recommend visiting the Canary Islands	9.00	9.06	8.83	9.04	8.99

How many islands do they visit during their trip?

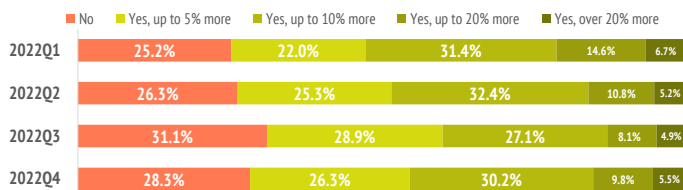
	2022Q1	2022Q2	2022Q3	2022Q4	2022
One island	91.0%	92.8%	92.8%	93.3%	92.5%
Two islands	5.6%	5.4%	6.4%	5.3%	5.6%
Three or more islands	3.3%	1.8%	0.8%	1.4%	1.9%

Sustainable destination

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



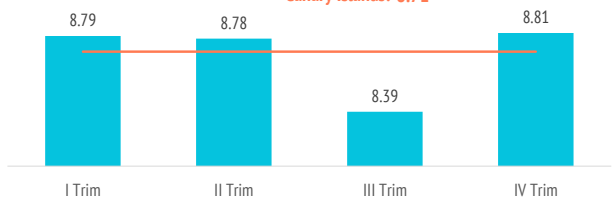
Would they be willing to spend more on travel to reduce their carbon footprint?



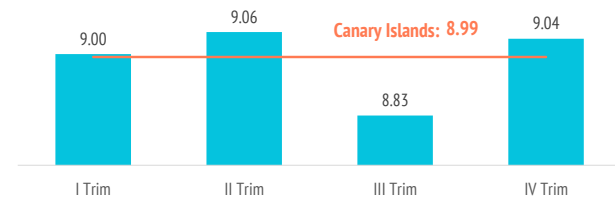
Perception during their stay*	2022Q1	2022Q2	2022Q3	2022Q4	2022
Quality of life on the island	8.0	8.0	7.6	7.9	7.9
Tolerance towards tourism	8.5	8.6	8.5	8.5	8.5
Cleanliness of the island	7.9	8.0	7.7	7.9	7.9
Air quality	8.4	8.7	8.4	8.4	8.5
Rational water consumption	6.9	7.0	6.8	7.1	7.0
Energy saving	6.5	6.6	6.2	6.5	6.4
Use of renewable energy	6.7	6.7	6.3	6.7	6.6
Recycling	6.6	6.8	6.3	6.6	6.6
Easy to get around by public transport	7.2	7.1	6.9	7.0	7.0
Overcrowding in tourist areas	5.9	5.8	5.9	5.7	5.8
Supply of local products	6.9	6.9	6.6	6.8	6.8

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

RETURN TO THE CANARY ISLANDS



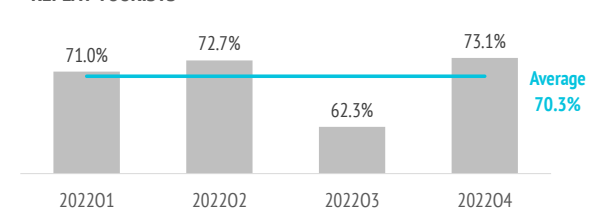
RECOMMEND VISITING THE CANARY ISLANDS



How many are loyal to the Canary Islands?

	2022Q1	2022Q2	2022Q3	2022Q4	2022
Repeat tourists	71.0%	72.7%	62.3%	73.1%	70.3%
At least 10 previous visits	20.4%	21.0%	11.0%	21.2%	18.8%
Repeat tourists (last 5 years)	66.3%	67.1%	55.8%	68.1%	64.9%
Repeat tourists (last 5 years)(5 or more visits)	15.0%	15.0%	6.9%	14.7%	13.2%

REPEAT TOURISTS



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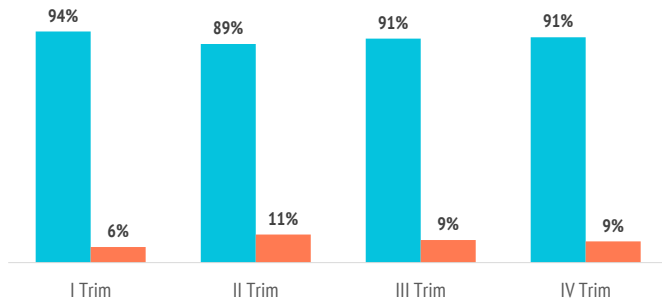
Where does the flight come from?



	2022Q1	2022Q2	2022Q3	2022Q4	2022
Germany	93.7%	88.6%	90.8%	91.4%	91.2%
Switzerland	1.5%	4.4%	5.0%	2.1%	3.1%
Spanish Mainland	3.6%	3.8%	0.8%	2.0%	2.5%
Luxembourg	0.4%	0.7%	1.0%	1.7%	1.1%
Portugal	0.3%	1.2%	1.2%	0.8%	0.9%
Others	0.5%	1.3%	1.2%	2.0%	1.3%

% TOURISTS BY QUARTER OF TRIP

■ Germany ■ Others



Who do they come with?



	2022Q1	2022Q2	2022Q3	2022Q4	2022
Unaccompanied	13.6%	12.2%	6.6%	12.2%	11.4%
Only with partner	53.8%	53.3%	44.7%	48.0%	49.9%
Only with children (< 13 years old)	3.8%	5.2%	8.5%	4.7%	5.4%
Partner + children (< 13 years old)	2.3%	4.8%	8.0%	6.8%	5.5%
Other relatives	7.4%	4.3%	5.6%	7.7%	6.4%
Friends	8.8%	5.4%	7.6%	6.6%	7.0%
Work colleagues	0.1%	0.2%	0.2%	0.4%	0.3%
Organized trip	0.4%	0.1%	0.0%	0.2%	0.2%
Other combinations ⁽¹⁾	9.8%	14.5%	18.9%	13.3%	13.9%

(1) Different situations have been isolated

Tourists with children	2022Q1	2022Q2	2022Q3	2022Q4	2022
- Between 0 and 2 years old	0.9%	1.5%	1.1%	0.7%	1.0%
- Between 3 and 12 years old	6.0%	10.9%	17.4%	13.5%	12.0%
- Between 0 -2 and 3-12 years	0.7%	0.9%	0.8%	0.5%	0.7%

Tourists without children	2022Q1	2022Q2	2022Q3	2022Q4	2022
	92.4%	86.6%	80.7%	85.3%	86.3%

Group composition:

- 1 person	16.3%	13.6%	7.9%	14.9%	13.4%
- 2 people	64.4%	60.0%	56.8%	56.5%	59.3%
- 3 people	8.9%	11.4%	15.1%	12.8%	12.0%
- 4 or 5 people	8.5%	13.6%	18.2%	13.3%	13.3%
- 6 or more people	1.8%	1.5%	2.0%	2.6%	2.0%

Average group size:	2022Q1	2022Q2	2022Q3	2022Q4	2022
	2.20	2.35	2.57	2.40	2.38

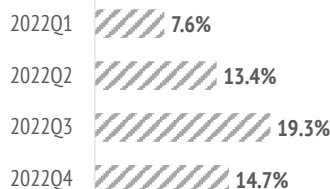
*People who share the main expenses of the trip



14% of tourists travel with children.



(under the age of 13)



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?



	2022Q1	2022Q2	2022Q3	2022Q4	2022
Gender					
Men	51.0%	51.0%	50.3%	49.8%	50.5%
Women	49.0%	49.0%	49.7%	50.2%	49.5%
Age					
Average age (tourist > 15 years old)	48.0	48.7	40.2	47.7	46.4
Standard deviation	16.9	16.5	15.1	16.4	16.6
Age range (> 15 years old)					
16 - 24 years old	10.5%	6.9%	19.2%	9.0%	11.0%
25 - 30 years old	9.5%	11.5%	15.4%	9.0%	11.1%
31 - 45 years old	25.4%	26.0%	28.9%	28.8%	27.4%
46 - 60 years old	26.7%	26.9%	25.7%	29.4%	27.4%
Over 60 years old	27.8%	28.6%	10.8%	23.8%	23.1%
Occupation					
Salaried worker	48.8%	58.3%	66.7%	59.6%	58.2%
Self-employed	9.3%	6.0%	7.1%	6.9%	7.3%
Unemployed	0.3%	0.1%	0.2%	0.4%	0.3%
Business owner	11.5%	9.7%	11.2%	12.3%	11.3%
Student	5.7%	3.6%	7.8%	2.8%	4.7%
Retired	22.4%	20.9%	6.0%	16.9%	16.8%
Unpaid domestic work	1.0%	0.4%	0.6%	0.1%	0.5%
Others	0.9%	1.1%	0.5%	0.9%	0.9%
Annual household income level					
Less than €25,000	11.2%	12.8%	12.8%	10.5%	11.7%
€25,000 - €49,999	31.6%	40.1%	31.6%	27.4%	32.2%
€50,000 - €74,999	27.7%	26.0%	33.3%	32.7%	30.1%
More than €74,999	29.5%	21.2%	22.3%	29.4%	26.0%
Education level					
No studies	0.5%	0.2%	0.3%	0.3%	0.3%
Primary education	2.7%	3.8%	2.7%	3.4%	3.2%
Secondary education	20.2%	28.6%	21.3%	23.3%	23.4%
Higher education	76.6%	67.3%	75.7%	72.9%	73.1%



AVERAGE AGE (> 15 years old)



% TOURISTS WITH INCOMES OVER €74,999

● 2022Q1 ● 2022Q3
● 2022Q2 ● 2022Q4



% SALARIED WORKER TOURISTS

