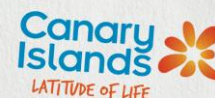


Tourist profile. Historical data (2019 - 2025)

GERMANY: First Quarter



How many are they and how much do they spend?

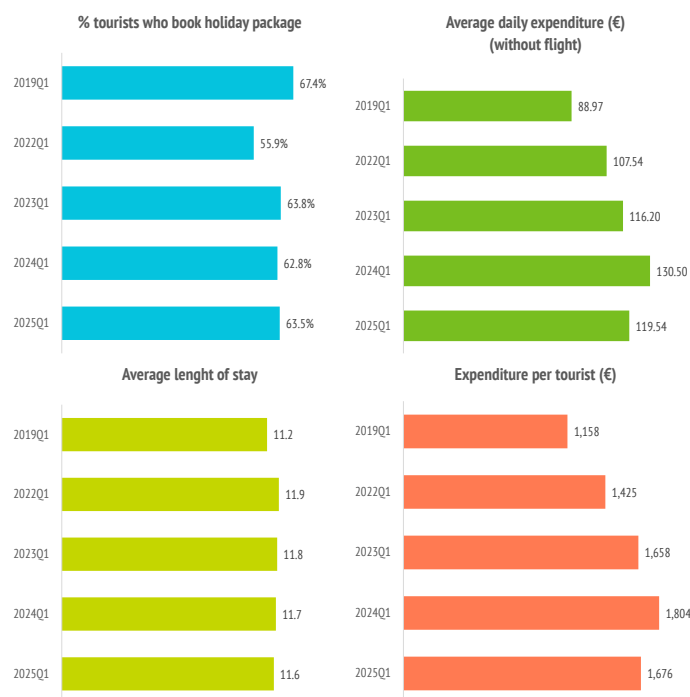


	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
TOURISTS					
Tourist arrivals (FRONTUR) (*)	769	530	716	860	854
Tourist arrivals ≥ 16 years old (EGT) (*)	707	486	665	789	787
- book holiday package (*)	477	272	424	495	499
- do not book holiday package (*)	230	214	241	293	287
- % tourists who book holiday package	67.4%	55.9%	63.8%	62.8%	63.5%
Children < 16 years old (FRONTUR - EGT) (*)	62	44	51	72	67
Expenditure per tourist (€)	1,158	1,425	1,658	1,804	1,676
- book holiday package	1,273	1,510	1,796	2,003	1,841
- holiday package	1,068	1,293	1,520	1,720	1,603
- others	205	216	276	283	237
- do not book holiday package	919	1,317	1,415	1,468	1,390
- flight	243	316	416	416	409
- accommodation	326	482	477	548	459
- others	350	519	521	504	522
Average lenght of stay	11.2	11.9	11.8	11.7	11.6
- Median	9.5	9.5	10.0	9.0	9.3
Average daily expenditure (€)	119.19	143.79	166.43	181.83	169.19
- Median	102.48	131.82	148.58	158.33	162.50
Average daily expenditure (without flight)	88.97	107.54	116.20	130.50	119.54
- Median	77.37	98.57	106.45	112.29	114.89
Average cost of the flight (€)	296.37	344.69	490.01	500.77	502.14
Total turnover (≥ 16 years old) (€m)	819	693	1,103	1,423	1,318
Turnover without flight (≥ 16 years old) (€m)	609	525	777	1,028	923

(*) Thousands of tourists

% Tourists whose spending has been greater than €0 in each item

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Accommodation:					
- Accommodation	88.6%	86.7%	89.0%	91.0%	88.1%
- Additional accommodation expenses	6.6%	5.8%	6.9%	5.3%	5.6%
Transport:					
- National/International Transport	97.2%	97.2%	97.3%	97.6%	97.1%
- Flights between islands	3.3%	5.0%	5.1%	3.8%	4.1%
- Taxi	50.9%	51.9%	57.1%	54.1%	50.1%
- Car rental	35.1%	35.6%	38.0%	40.2%	38.3%
- Public transport	14.0%	13.6%	16.9%	15.8%	16.4%
Food and drink:					
- Food purchases at supermarkets	52.8%	53.4%	57.7%	57.2%	55.4%
- Restaurants	56.1%	58.5%	63.2%	59.9%	61.7%
Leisure:					
- Organized excursions	20.3%	21.1%	25.2%	23.3%	24.1%
- Sport activities	6.2%	6.3%	9.6%	7.5%	5.3%
- Cultural activities	2.8%	1.2%	2.8%	3.6%	3.2%
- Museums	5.4%	4.9%	6.9%	7.2%	8.3%
- Theme Parks	5.4%	4.9%	8.2%	7.2%	7.8%
- Discos and pubs	3.5%	4.5%	4.4%	3.9%	5.4%
- Wellness	3.6%	4.7%	5.2%	5.2%	3.9%
Purchases of goods:					
- Souvenirs	40.4%	32.9%	38.7%	36.6%	37.9%
- Other expenses	1.0%	0.7%	0.8%	0.5%	0.7%
Other:					
- Medical or pharmaceutical expenses	7.7%	7.7%	8.3%	8.3%	7.6%
- Other expenses	5.6%	5.1%	6.0%	4.0%	3.5%



Average expenditure of tourists whose spending has been greater than €0 in each item

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Expenditure per tourist and trip (€)					
Accommodation:	784	911	998	1,149	1,038
- Accommodation	646	772	822	961	874
- Additional accommodation expenses	138	139	176	188	164
Transport:	545	761	889	902	887
- National/International Transport	305	355	503	513	517
- Flights between islands	48	67	89	77	72
- Taxi	64	123	118	121	117
- Car rental	100	180	154	159	154
- Public transport	28	36	25	33	27
Food and drink:	233	322	308	314	313
- Food purchases at supermarkets	95	117	115	124	123
- Restaurants	138	205	193	190	191
Leisure:	428	606	516	534	510
- Organized excursions	85	86	106	95	95
- Sport activities	92	204	109	132	93
- Cultural activities	41	25	47	60	41
- Museums	24	26	30	30	29
- Theme Parks	48	53	57	65	69
- Discos and pubs	67	98	82	86	70
- Wellness	70	115	85	66	113
Purchases of goods:	518	160	126	186	330
- Souvenirs	81	90	93	102	78
- Other expenses	437	70	33	84	252
Other:	131	133	160	137	124
- Medical or pharmaceutical expenses	53	61	59	40	45
- Other expenses	77	72	101	97	79

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

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

Tourist profile. Historical data (2019 - 2025)

GERMANY: First Quarter



What is the main purpose of their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Holiday, leisure	93.3%	91.9%	90.7%	93.1%	92.0%
Visiting family or friends	4.2%	5.7%	6.5%	5.0%	6.0%
Business and work	0.9%	0.8%	0.8%	0.4%	0.6%
Education and training	0.2%	0.2%	0.3%	0.1%	0.3%
Sports training	0.6%	0.9%	0.9%	0.9%	0.6%
Health or medical care	0.2%	0.1%	0.2%	0.2%	0.2%
Fairs and congresses	0.0%	0.1%	0.0%	0.0%	0.0%
Others	0.7%	0.3%	0.7%	0.3%	0.4%

What is the main motivation for their holidays?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Rest	42.9%	44.9%	41.1%	42.4%	42.8%
Enjoy family time	8.4%	8.2%	9.7%	10.9%	7.9%
Have fun	6.0%	6.6%	6.3%	7.0%	7.2%
Explore the destination	34.7%	32.6%	34.3%	32.6%	35.4%
Practice their hobbies	5.3%	4.5%	5.2%	4.5%	3.1%
Other reasons	2.7%	3.2%	3.4%	2.5%	3.7%

Where did they spend their main holiday last year? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Didn't have holidays	--	24.7%	14.3%	11.4%	11.4%
Canary Islands	--	20.1%	22.6%	22.9%	24.8%
Other destination	--	55.2%	63.1%	65.7%	63.8%
- Balearic Islands	--	4.8%	4.8%	5.2%	5.0%
- Rest of Spain	--	4.5%	5.5%	6.7%	8.3%
- Italy	--	11.0%	11.5%	10.6%	9.9%
- France	--	4.0%	4.5%	5.0%	5.2%
- Turkey	--	2.1%	3.1%	3.6%	3.4%
- Greece	--	8.6%	6.3%	6.7%	6.7%
- Portugal	--	2.6%	4.4%	3.6%	4.4%
- Croatia	--	4.2%	4.4%	3.7%	2.7%
- Egypt	--	1.0%	1.6%	2.0%	1.3%
- Tunisia	--	0.0%	0.2%	0.2%	0.4%
- Morocco	--	0.4%	0.1%	0.4%	0.8%
- Others	--	11.9%	16.9%	17.9%	15.6%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
None (I was clear about "this Canary Island")	--	35.6%	35.4%	33.7%	37.3%
Canary Islands (other island)	--	31.6%	33.8%	32.2%	33.1%
Other destination	--	32.8%	30.8%	34.1%	29.6%
- Balearic Islands	--	5.0%	3.7%	4.2%	4.3%
- Rest of Spain	--	4.5%	4.3%	4.1%	4.1%
- Italy	--	2.5%	2.4%	3.8%	2.4%
- France	--	0.7%	0.5%	1.3%	0.7%
- Turkey	--	2.5%	1.6%	2.3%	1.9%
- Greece	--	4.3%	3.3%	4.9%	3.2%
- Portugal	--	4.2%	5.5%	4.7%	4.8%
- Croatia	--	0.9%	0.8%	1.7%	0.9%
- Egypt	--	4.4%	4.8%	4.4%	4.2%
- Others	--	3.9%	3.9%	2.8%	3.1%

* Percentage of valid answers

Importance of each factor in the destination choice



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Climate	83.1%	82.1%	83.0%	80.7%	82.6%
Sea	56.7%	57.5%	59.5%	60.8%	60.3%
Safety	55.9%	50.6%	53.3%	56.0%	55.7%
Tranquility	51.5%	47.8%	50.4%	49.7%	51.0%
Beaches	41.4%	44.2%	42.8%	45.7%	44.9%
Landscapes	43.0%	40.3%	44.5%	42.7%	44.0%
European belonging	44.0%	46.1%	40.1%	42.0%	43.8%
Effortless trip	46.6%	46.0%	44.0%	46.5%	42.4%
Accommodation supply	40.3%	33.2%	38.8%	36.2%	38.9%
Environment	31.3%	29.2%	23.2%	30.9%	27.9%
Price	30.4%	24.3%	24.3%	23.7%	27.3%
Gastronomy	25.2%	27.1%	27.1%	27.8%	23.8%
Authenticity	19.0%	17.7%	18.3%	21.5%	20.8%
Hiking trail network	16.2%	17.4%	14.3%	15.6%	14.8%
Fun possibilities	14.7%	16.0%	19.3%	18.7%	13.2%
Shopping	8.9%	9.1%	6.7%	9.5%	8.7%
Culture	8.9%	7.1%	9.4%	7.9%	7.7%
Historical heritage	10.1%	6.5%	7.2%	7.6%	7.6%
Exoticism	7.3%	6.9%	5.7%	7.6%	6.9%
Nightlife	4.0%	5.1%	4.6%	5.1%	4.6%

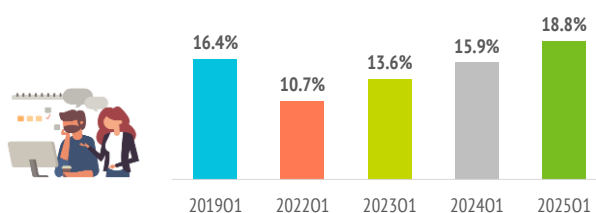
Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")
% of tourists who indicate that the factor is "very important" in their choice.

How far in advance do they book their trip?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
The same day	0.7%	0.8%	0.6%	0.7%	0.9%
Between 1 and 30 days	26.0%	39.6%	27.0%	26.1%	23.2%
Between 1 and 2 months	23.6%	25.6%	28.6%	22.1%	23.1%
Between 3 and 6 months	33.3%	23.3%	30.2%	35.2%	34.0%
More than 6 months	16.4%	10.7%	13.6%	15.9%	18.8%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



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



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Previous visits to the Canary Islands	53.8%	47.2%	50.9%	48.1%	48.4%
Friends or relatives	21.5%	29.6%	25.2%	23.8%	23.0%
Internet or social media	50.3%	52.3%	49.8%	55.1%	49.2%
Mass Media	2.4%	3.2%	2.1%	2.1%	2.3%
Travel guides and magazines	13.0%	10.4%	11.8%	10.0%	10.0%
Travel Blogs or Forums	4.3%	4.8%	4.7%	6.0%	4.5%
Travel TV Channels	1.6%	1.6%	1.0%	1.9%	1.4%
Tour Operator or Travel Agency	27.3%	21.3%	24.9%	25.2%	22.5%
Public administrations or similar	0.4%	0.8%	0.7%	0.3%	0.3%
Others	2.8%	2.4%	2.4%	1.4%	2.3%

* Multi-choice question

Tourist profile. Historical data (2019 - 2025)

GERMANY: First Quarter



With whom did they book their flight and accommodation?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Flight					
- Directly with the airline	34.9%	40.7%	34.2%	35.6%	35.1%
- Tour Operator or Travel Agency	65.1%	59.3%	65.8%	64.4%	64.9%
Accommodation					
- Directly with the accommodation	24.7%	28.0%	24.1%	24.5%	23.8%
- Tour Operator or Travel Agency	75.3%	72.0%	75.9%	75.5%	76.2%

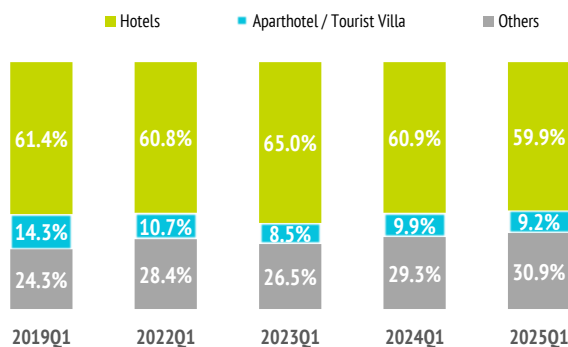
Where does the flight come from?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Germany	92.5%	93.7%	93.7%	92.7%	95.3%
Luxembourg	0.5%	0.4%	0.8%	1.5%	1.5%
Spanish Mainland	3.1%	3.6%	2.6%	1.4%	1.4%
Austria	0.4%	0.0%	0.0%	0.1%	0.4%
Switzerland	1.9%	1.5%	1.3%	2.5%	0.4%
Portugal	0.5%	0.3%	0.8%	0.8%	0.3%
Others	0.0%	0.0%	0.2%	0.1%	0.2%
Denmark	0.2%	0.0%	0.0%	0.0%	0.2%
Poland	0.0%	0.2%	0.1%	0.1%	0.2%
Netherlands	0.2%	0.0%	0.3%	0.1%	0.1%
Others	0.8%	0.3%	0.4%	0.6%	0.1%

Where do they stay?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
1-2-3* Hotel	11.9%	11.0%	10.9%	10.9%	11.8%
4* Hotel	43.3%	41.8%	44.5%	41.3%	40.1%
5* Hotel / 5* Luxury Hotel	6.1%	8.1%	9.7%	8.7%	8.0%
Aparthotel / Tourist Villa	14.3%	10.7%	8.5%	9.9%	9.2%
House/room rented in a private dwelling	7.7%	11.3%	9.7%	17.9%	18.9%
Private accommodation (1)	7.1%	8.3%	8.2%	6.0%	7.6%
Others (Cottage, cruise, camping,...)	9.5%	8.8%	8.6%	5.4%	4.5%

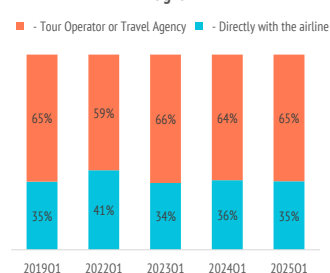
(1) Own property /House of friends or relatives / Free housing exchange / Other private accommodation.



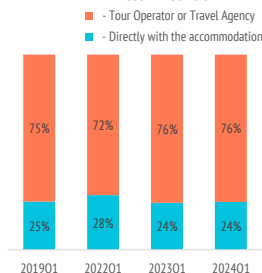
What do they book?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Room only	22.2%	25.8%	22.1%	26.0%	25.9%
Bed and Breakfast	8.7%	9.7%	10.6%	10.7%	10.2%
Half board	28.7%	23.7%	32.8%	25.8%	29.9%
Full board	4.6%	2.8%	2.6%	2.9%	2.7%
All inclusive	35.8%	37.9%	32.0%	34.6%	31.2%

Flight

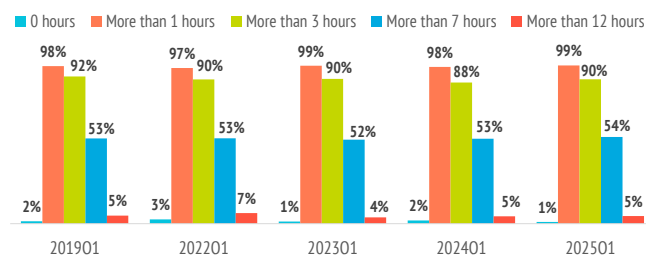


Accommodation



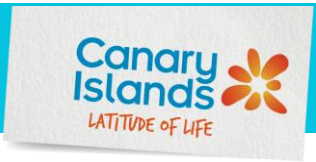
Activities in the Canary Islands

Outdoor time per day	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
0 hours	1.5%	2.7%	1.3%	2.0%	1.1%
1 - 2 hours	6.5%	7.1%	8.2%	9.7%	8.7%
3 - 6 hours	38.7%	36.9%	38.0%	35.1%	36.0%
7 - 12 hours	48.2%	46.7%	48.5%	48.5%	49.4%
More than 12 hours	5.1%	6.7%	3.9%	4.6%	4.8%
Outdoor time per day	7.2	7.2	6.9	7.0	7.2



Activities in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Beach	68.9%	76.1%	73.6%	77.7%	74.0%
Walk, wander	60.0%	61.8%	65.5%	61.8%	64.6%
Explore the island on their own	54.3%	52.9%	54.1%	58.1%	56.5%
Taste Canarian gastronomy	30.3%	34.8%	35.2%	35.5%	36.0%
Swimming pool, hotel facilities	32.3%	32.7%	36.8%	37.9%	33.5%
Hiking	--	24.2%	26.8%	26.4%	26.7%
Organized excursions	14.4%	13.0%	14.9%	13.8%	13.8%
Museums / exhibitions	10.9%	9.4%	10.6%	12.1%	12.9%
Other Nature Activities	--	11.2%	12.1%	13.9%	12.9%
Wineries / markets / popular festivals	12.0%	9.0%	11.6%	11.1%	11.9%
Theme parks	10.3%	7.1%	9.0%	10.3%	9.6%
Sea excursions / whale watching	7.3%	9.9%	9.7%	8.6%	9.0%
Nightlife / concerts / shows	7.9%	9.0%	9.7%	10.0%	8.7%
Astronomical observation	5.1%	5.9%	4.9%	5.5%	5.4%
Practice other sports	--	5.9%	5.6%	4.5%	5.2%
Beauty and health treatments	4.1%	4.8%	4.9%	4.6%	4.0%
Cycling / Mountain bike	--	6.5%	4.7%	5.0%	3.6%
Running	--	3.6%	1.8%	2.8%	2.4%
Surf	--	4.5%	4.1%	4.0%	2.0%
Scuba Diving	--	2.5%	2.0%	3.1%	2.0%
Golf	--	1.5%	2.6%	2.4%	1.8%
Swim	--	18.7%	3.2%	2.9%	1.7%
Windsurf / Kitesurf	--	1.7%	1.3%	1.1%	0.7%

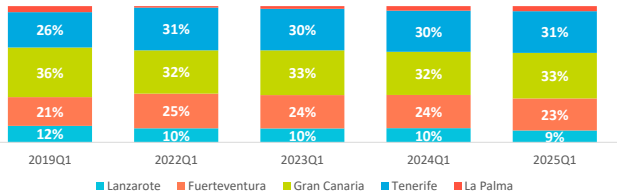
* Multi-choise question



Which island do they choose?



Tourists (≥ 16 year old)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	82,646	48,588	67,203	81,460	68,123
Fuerteventura	144,612	119,920	160,768	190,754	183,565
Gran Canaria	249,180	150,431	216,532	247,259	260,971
Tenerife	177,546	147,986	200,436	236,509	238,969
La Palma	30,406	5,051	13,009	26,077	29,535



How many are loyal to the Canary Islands?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Repeat tourists	75.9%	71.0%	76.4%	74.2%	77.1%
At least 10 previous visits	21.4%	20.4%	19.1%	19.0%	22.5%
Repeat tourists (last 5 years)	73.1%	66.3%	72.6%	68.8%	72.7%
Repeat tourists (last 5 years)(5 or more visits)	22.1%	15.0%	13.5%	16.1%	18.4%

Who are they?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Gender					
Men	52.6%	51.0%	50.0%	52.2%	51.0%
Women	47.4%	49.0%	50.0%	47.8%	49.0%
Age					
Average age	50.8	48.0	51.3	50.0	52.7
Standard deviation	16.0	16.9	17.1	16.7	17.6
Age range					
16 - 24 years old	5.5%	10.5%	7.0%	6.6%	7.0%
25 - 30 years old	8.9%	9.5%	9.4%	9.0%	8.5%
31 - 45 years old	22.5%	25.4%	21.2%	26.6%	21.9%
46 - 60 years old	31.7%	26.7%	26.6%	25.8%	20.6%
Over 60 years old	31.4%	27.8%	35.8%	32.0%	42.1%
Occupation					
Salaried worker	46.3%	48.8%	45.1%	51.9%	48.0%
Self-employed	9.5%	9.3%	8.6%	10.2%	7.4%
Unemployed	0.3%	0.3%	0.7%	0.4%	0.4%
Business owner	14.4%	11.5%	9.9%	9.3%	7.8%
Student	3.9%	5.7%	4.0%	3.5%	4.8%
Retired	24.0%	22.4%	30.6%	23.0%	29.8%
Unpaid domestic work	0.5%	1.0%	0.4%	0.4%	0.7%
Others	1.1%	0.9%	0.8%	1.3%	1.0%
Annual household income level					
Less than €25,000	11.8%	11.2%	9.2%	9.0%	8.4%
€25,000 - €49,999	40.5%	31.6%	31.7%	32.0%	32.8%
€50,000 - €74,999	24.2%	27.7%	25.8%	29.9%	28.5%
More than €74,999	23.6%	29.5%	33.3%	29.1%	30.3%
Education level					
No studies	0.7%	0.5%	0.4%	0.1%	0.2%
Primary education	3.8%	2.7%	2.9%	3.2%	2.9%
Secondary education	23.7%	20.2%	20.0%	19.1%	21.7%
Higher education	71.9%	76.6%	76.8%	77.7%	75.1%

Share by islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	12.1%	10.3%	10.2%	10.4%	8.7%
Fuerteventura	21.1%	25.4%	24.4%	24.4%	23.5%
Gran Canaria	36.4%	31.9%	32.9%	31.6%	33.4%
Tenerife	25.9%	31.4%	30.5%	30.2%	30.6%
La Palma	4.4%	1.1%	2.0%	3.3%	3.8%

How many islands do they visit during their trip?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
One island	88.8%	91.0%	91.3%	91.3%	93.1%
Two islands	5.8%	5.6%	6.9%	5.8%	5.0%
Three or more islands	5.4%	3.3%	1.9%	2.8%	1.9%

How do they rate the Canary Islands?



Satisfaction (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Average rating	8.66	8.71	8.72	8.65	8.54

Experience in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Worse or much worse than expected	1.5%	1.3%	1.4%	1.9%	2.3%
Lived up to expectations	55.3%	52.0%	56.5%	54.9%	58.6%
Better or much better than expected	43.2%	46.7%	42.0%	43.1%	39.1%

Future intentions (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Return to the Canary Islands	8.87	8.79	8.80	8.71	8.69
Recommend visiting the Canary Islands	9.01	9.00	8.99	8.87	8.86

Who do they come with?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Unaccompanied	11.4%	13.6%	12.1%	11.0%	12.9%
Only with partner	55.9%	53.8%	56.2%	49.1%	57.7%
Only with children (< 13 years old)	4.0%	3.8%	3.4%	5.6%	2.3%
Partner + children (< 13 years old)	4.6%	2.3%	4.3%	5.9%	4.7%
Other relatives	5.0%	7.4%	6.0%	5.1%	4.5%
Friends	6.8%	8.8%	6.1%	8.9%	7.6%
Work colleagues	0.5%	0.1%	0.1%	0.1%	0.0%
Organized trip	0.5%	0.4%	0.3%	0.1%	0.6%
Other combinations (2)	11.2%	9.8%	11.5%	14.2%	9.7%

(2) Combination of some of the groups previously analyzed

Tourists with children	10.5%	7.6%	9.9%	14.9%	9.4%
- Between 0 and 2 years old	2.0%	0.9%	1.3%	1.1%	1.5%
- Between 3 and 12 years old	7.4%	6.0%	8.1%	12.7%	7.2%
- Between 0 -2 and 3-12 years old	1.1%	0.7%	0.4%	1.2%	0.7%
Tourists without children	89.5%	92.4%	90.1%	85.1%	90.6%
Group composition:					
- 1 person	15.5%	16.3%	14.6%	12.2%	15.1%
- 2 people	63.7%	64.4%	63.1%	60.6%	65.9%
- 3 people	9.5%	8.9%	11.2%	12.5%	8.6%
- 4 or 5 people	9.8%	8.5%	9.4%	12.5%	8.7%
- 6 or more people	1.5%	1.8%	1.7%	2.2%	1.7%
Average group size:	2.22	2.20	2.26	2.40	2.22

*People who share the main expenses of the trip

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

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