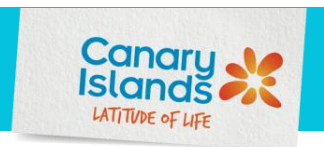


Tourist profile. Historical data (2019 - 2025)

GERMANY: Third Quarter



How many are they and how much do they spend?

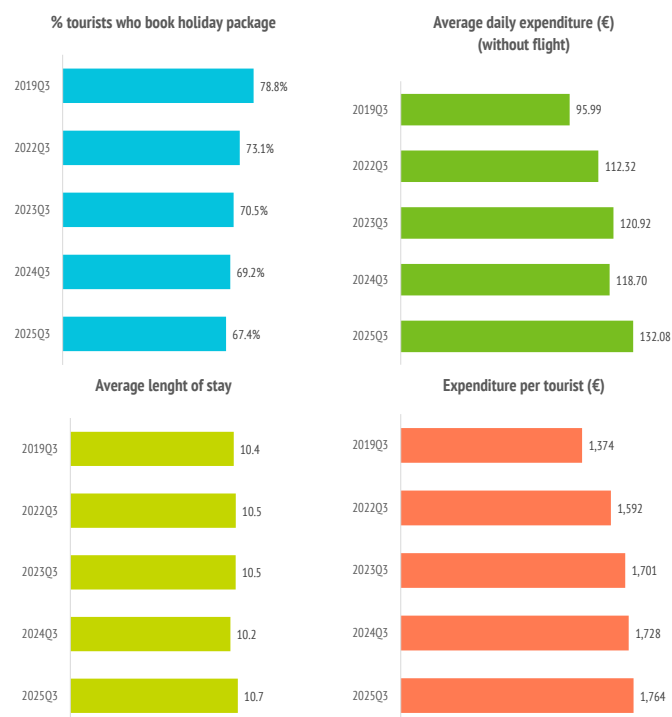


	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
TOURISTS					
Tourist arrivals (FRONTUR) (*)	550	507	492	517	544
Tourist arrivals ≥ 16 years old (EGT) (*)	472	433	418	439	456
- book holiday package (*)	371	316	295	303	308
- do not book holiday package (*)	100	117	123	135	149
- % tourists who book holiday package	78.8%	73.1%	70.5%	69.2%	67.4%
Children < 16 years old (FRONTUR - EGT) (*)	78	74	74	78	88
Expenditure per tourist (€)	1,374	1,592	1,701	1,728	1,764
- book holiday package	1,440	1,632	1,800	1,849	1,925
- holiday package	1,250	1,400	1,554	1,628	1,698
- others	190	232	245	221	227
- do not book holiday package	1,127	1,484	1,464	1,455	1,432
- flight	333	451	424	487	419
- accommodation	348	510	546	442	444
- others	446	524	494	526	569
Average lenght of stay	10.4	10.5	10.5	10.2	10.7
- Median	10.0	10.0	10.0	10.0	10.0
Average daily expenditure (€)	139.59	163.82	175.07	182.18	184.86
- Median	124.73	147.50	155.83	168.12	166.67
Average daily expenditure (without flight)	95.99	112.32	120.92	118.70	132.08
- Median	87.57	103.33	109.20	113.43	120.37
Average cost of the flight (€)	428.43	494.56	518.52	594.74	504.00
Total turnover (≥ 16 years old) (€m)	648	689	711	758	805
Turnover without flight (≥ 16 years old) (€m)	446	475	494	497	575

(*) Thousands of tourists

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

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Accommodation:					
- Accommodation	90.3%	92.0%	88.5%	87.4%	86.3%
- Additional accommodation expenses	6.6%	5.8%	4.9%	4.9%	5.0%
Transport:					
- National/International Transport	96.4%	98.2%	94.2%	97.6%	96.0%
- Flights between islands	3.2%	4.2%	5.0%	1.7%	4.7%
- Taxi	63.7%	63.2%	65.4%	61.3%	58.0%
- Car rental	28.8%	35.1%	33.5%	35.5%	39.2%
- Public transport	8.3%	9.7%	12.6%	12.1%	11.6%
Food and drink:					
- Food purchases at supermarkets	48.8%	56.6%	58.0%	54.1%	59.5%
- Restaurants	42.3%	51.1%	49.4%	49.8%	52.3%
Leisure:					
- Organized excursions	31.0%	34.3%	38.0%	34.3%	33.3%
- Sport activities	7.2%	10.4%	10.2%	8.0%	7.3%
- Cultural activities	2.9%	3.1%	3.3%	2.5%	3.0%
- Museums	5.3%	5.0%	6.2%	4.9%	6.5%
- Theme Parks	5.5%	12.5%	12.0%	11.4%	11.2%
- Discos and pubs	3.8%	5.9%	6.0%	4.5%	3.6%
- Wellness	3.4%	5.8%	5.4%	4.3%	2.4%
Purchases of goods:					
- Souvenirs	42.0%	42.2%	41.2%	42.0%	41.0%
- Other expenses	0.9%	1.0%	1.2%	0.8%	1.8%
Other:					
- Medical or pharmaceutical expenses	5.7%	9.0%	7.3%	7.0%	6.7%
- Other expenses	5.1%	5.7%	5.1%	4.4%	3.1%



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

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Expenditure per tourist and trip (€)					
Accommodation:					
- Accommodation	832	847	1,069	954	949
- Additional accommodation expenses	716	765	901	838	866
- Additional accommodation expenses	116	82	168	116	82
Transport:					
- National/International Transport	722	895	883	1,001	1,040
- National/International Transport	444	504	550	609	525
- Flights between islands	77	82	82	82	67
- Taxi	80	122	109	131	270
- Car rental	104	161	126	142	151
- Public transport	17	26	16	36	26
Food and drink:					
- Food purchases at supermarkets	232	243	264	277	301
- Food purchases at supermarkets	108	91	106	104	118
- Restaurants	124	152	159	174	183
Leisure:					
- Organized excursions	549	547	533	594	608
- Organized excursions	97	108	103	115	150
- Sport activities	207	116	101	109	107
- Cultural activities	39	52	61	40	46
- Museums	31	32	33	27	28
- Theme Parks	57	71	69	80	95
- Discos and pubs	73	91	90	110	84
- Wellness	46	78	76	115	98
Purchases of goods:					
- Souvenirs	176	259	452	440	159
- Souvenirs	93	91	78	85	75
- Other expenses	83	169	374	355	84
Other:					
- Medical or pharmaceutical expenses	118	122	136	141	329
- Medical or pharmaceutical expenses	37	40	45	67	59
- Other expenses	81	82	92	73	270

Source: Tourist Expenditure Survey (EGT, ISTAC).

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

What is the main purpose of their trip?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Holiday, leisure	95.9%	96.0%	94.2%	93.7%	92.9%
Visiting family or friends	2.7%	2.5%	3.9%	4.9%	4.5%
Business and work	0.6%	0.6%	1.8%	0.4%	0.6%
Education and training	0.1%	0.1%	0.0%	0.1%	0.2%
Sports training	0.4%	0.1%	0.1%	0.1%	0.4%
Health or medical care	0.2%	0.0%	0.0%	0.4%	0.0%
Fairs and congresses	0.0%	0.4%	0.0%	0.0%	0.4%
Others	0.1%	0.3%	0.1%	0.2%	0.9%

What is the main motivation for their holidays?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Rest	52.1%	48.9%	46.6%	44.6%	41.1%
Enjoy family time	11.2%	12.5%	12.5%	16.7%	15.7%
Have fun	9.3%	11.1%	12.9%	11.8%	12.2%
Explore the destination	24.5%	23.9%	25.2%	23.8%	28.5%
Practice their hobbies	1.9%	2.2%	1.8%	2.3%	2.0%
Other reasons	1.0%	1.3%	1.0%	0.9%	0.5%

Where did they spend their main holiday last year? *

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Didn't have holidays	--	32.7%	16.9%	14.3%	13.8%
Canary Islands	--	18.1%	21.9%	23.7%	24.0%
Other destination	--	49.2%	61.1%	62.0%	62.1%
- Balearic Islands	--	5.3%	6.0%	6.5%	7.0%
- Rest of Spain	--	2.9%	5.6%	6.0%	5.8%
- Italy	--	8.7%	8.4%	8.2%	7.2%
- France	--	2.4%	3.2%	3.0%	3.4%
- Turkey	--	3.6%	5.3%	4.3%	4.5%
- Greece	--	8.1%	9.9%	8.3%	8.1%
- Portugal	--	1.4%	2.4%	3.4%	2.0%
- Croatia	--	4.5%	3.9%	3.3%	4.3%
- Egypt	--	1.0%	2.2%	2.8%	2.1%
- Tunisia	--	0.1%	0.3%	0.3%	0.4%
- Morocco	--	0.1%	0.8%	0.9%	1.0%
- Others	--	11.2%	13.2%	15.0%	16.3%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
None (I was clear about "this Canary Island")	--	17.7%	20.2%	18.9%	20.5%
Canary Islands (other island)	--	21.4%	21.9%	23.6%	22.8%
Other destination	--	60.9%	58.0%	57.5%	56.6%
- Balearic Islands	--	10.1%	7.7%	9.3%	8.5%
- Rest of Spain	--	7.6%	6.9%	7.3%	7.3%
- Italy	--	6.6%	6.3%	7.6%	7.1%
- France	--	1.9%	2.6%	2.1%	2.8%
- Turkey	--	4.2%	4.3%	2.7%	2.8%
- Greece	--	14.9%	15.2%	12.8%	12.3%
- Portugal	--	6.5%	6.2%	7.1%	7.4%
- Croatia	--	4.0%	4.4%	4.4%	4.0%
- Egypt	--	2.9%	2.5%	2.4%	1.9%
- Others	--	2.2%	1.9%	1.7%	2.5%

* Percentage of valid answers

Importance of each factor in the destination choice

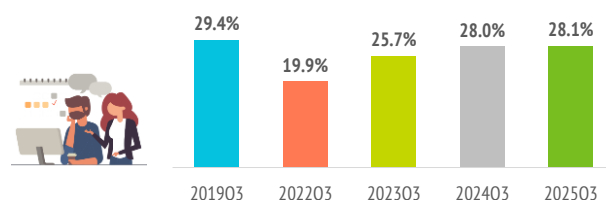
	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Sea	64.7%	67.6%	65.7%	63.6%	66.8%
Climate	67.1%	60.0%	60.9%	60.0%	59.0%
Safety	57.6%	54.0%	57.5%	57.5%	58.2%
Beaches	53.4%	55.2%	55.4%	53.5%	56.5%
Tranquility	50.8%	47.0%	48.5%	48.3%	48.9%
Effortless trip	44.1%	48.9%	48.0%	48.7%	46.3%
Accommodation supply	42.3%	43.4%	43.9%	41.1%	38.1%
Landscapes	31.7%	29.8%	30.8%	29.2%	34.5%
European belonging	39.2%	32.5%	34.5%	35.6%	33.5%
Price	30.3%	32.6%	34.9%	34.0%	30.4%
Gastronomy	22.1%	25.4%	25.0%	23.5%	23.7%
Environment	22.4%	20.2%	21.7%	20.4%	23.2%
Authenticity	19.3%	19.3%	20.6%	20.2%	22.2%
Fun possibilities	19.4%	22.7%	23.6%	17.6%	20.2%
Shopping	10.7%	10.0%	11.6%	10.7%	13.4%
Exoticism	8.6%	7.5%	8.8%	7.6%	11.5%
Culture	8.0%	6.7%	8.9%	7.9%	8.5%
Hiking trail network	6.6%	6.6%	5.2%	9.1%	7.5%
Historical heritage	7.8%	5.6%	6.9%	5.8%	7.4%
Nightlife	5.0%	4.5%	5.7%	4.9%	6.4%

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?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
The same day	0.6%	0.7%	0.5%	0.8%	0.3%
Between 1 and 30 days	19.0%	22.5%	16.7%	20.1%	20.1%
Between 1 and 2 months	16.3%	19.4%	18.7%	17.5%	17.4%
Between 3 and 6 months	34.7%	37.5%	38.4%	33.6%	34.1%
More than 6 months	29.4%	19.9%	25.7%	28.0%	28.1%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



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

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Previous visits to the Canary Islands	42.3%	38.7%	33.8%	39.5%	40.7%
Friends or relatives	24.5%	25.3%	24.9%	26.0%	26.1%
Internet or social media	55.5%	59.3%	55.3%	56.2%	57.7%
Mass Media	1.9%	3.0%	2.3%	2.1%	3.3%
Travel guides and magazines	12.5%	10.4%	8.4%	9.3%	9.5%
Travel Blogs or Forums	6.1%	7.2%	5.3%	5.7%	5.7%
Travel TV Channels	1.1%	1.5%	1.0%	1.0%	1.3%
Tour Operator or Travel Agency	38.4%	32.0%	39.7%	30.2%	25.9%
Public administrations or similar	0.5%	0.8%	0.7%	0.3%	0.3%
Others	1.8%	3.0%	2.4%	3.6%	3.3%

* Multi-choice question

With whom did they book their flight and accommodation?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Flight					
- Directly with the airline	19.9%	22.4%	21.8%	26.9%	29.7%
- Tour Operator or Travel Agency	80.1%	77.6%	78.2%	73.1%	70.3%
Accommodation					
- Directly with the accommodation	12.0%	15.3%	14.2%	17.4%	20.7%
- Tour Operator or Travel Agency	88.0%	84.7%	85.8%	82.6%	79.3%

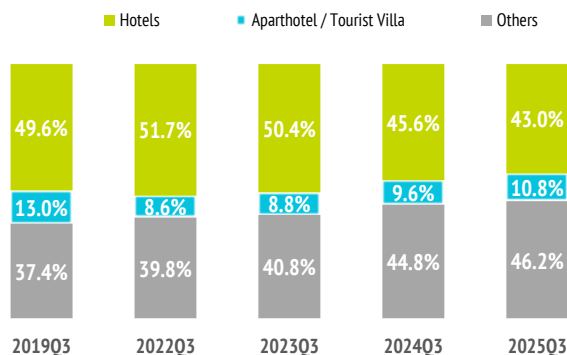
Where does the flight come from?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Germany	93.5%	90.8%	92.6%	93.0%	91.6%
Switzerland	2.5%	5.0%	2.9%	3.0%	3.1%
Spanish Mainland	2.2%	0.8%	2.0%	1.4%	2.1%
Portugal	0.8%	1.2%	0.8%	0.1%	1.3%
Austria	0.0%	0.0%	0.3%	0.5%	0.5%
Luxembourg	0.3%	1.0%	0.5%	0.4%	0.5%
Netherlands	0.1%	0.1%	0.4%	0.3%	0.5%
Czech Republic	0.0%	0.0%	0.0%	0.0%	0.4%
United Kingdom	0.2%	0.0%	0.2%	0.2%	0.1%
Denmark	0.0%	0.1%	0.1%	0.0%	0.1%
Others	0.5%	1.0%	0.3%	1.1%	0.0%

Where do they stay?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
1-2-3* Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
4* Hotel	49.6%	51.7%	50.4%	45.6%	43.0%
5* Hotel / 5* Luxury Hotel	0.0%	0.0%	0.0%	0.0%	0.0%
Aparthotel / Tourist Villa	13.0%	8.6%	8.8%	9.6%	10.8%
House/room rented in a private dwelling	4.1%	7.1%	7.7%	11.4%	16.6%
Private accommodation (1)	5.9%	5.6%	5.3%	8.5%	8.0%
Others (Cottage, cruise, camping...)	3.6%	5.0%	3.8%	1.2%	1.9%

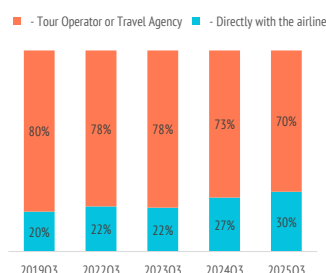
(1) Own property / House of friends or relatives / Free housing exchange / Other private accommodation.



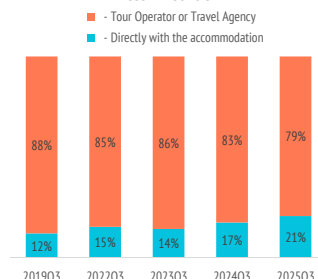
What do they book?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Room only	12.1%	13.6%	13.6%	17.0%	23.5%
Bed and Breakfast	5.3%	5.1%	6.9%	5.7%	6.0%
Half board	29.7%	27.5%	24.4%	26.7%	22.7%
Full board	3.5%	2.9%	2.9%	3.0%	3.6%
All inclusive	49.3%	50.9%	52.3%	47.6%	44.2%

Flight

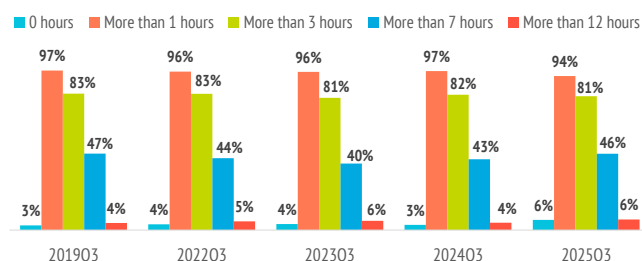


Accommodation



Activities in the Canary Islands

Outdoor time per day	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
0 hours	2.8%	3.5%	3.7%	3.2%	6.2%
1 - 2 hours	14.1%	13.5%	15.8%	14.4%	12.3%
3 - 6 hours	36.5%	39.2%	40.1%	39.3%	35.1%
7 - 12 hours	42.2%	38.5%	34.9%	38.6%	40.0%
More than 12 hours	4.3%	5.3%	5.6%	4.5%	6.5%
Outdoor time per day	6.4	6.3	6.1	6.2	6.6

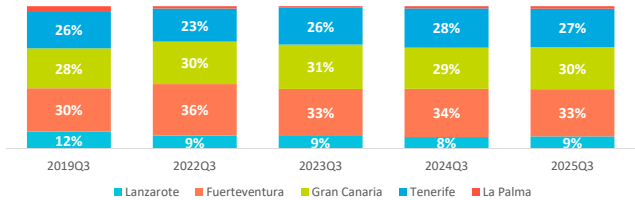


Activities in the Canary Islands	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Beach	87.2%	89.5%	87.0%	86.8%	85.8%
Explore the island on their own	49.0%	52.9%	53.5%	53.5%	53.3%
Walk, wander	44.2%	48.7%	48.3%	49.9%	48.7%
Swimming pool, hotel facilities	50.5%	51.4%	53.6%	51.1%	47.9%
Taste Canarian gastronomy	29.0%	30.4%	30.2%	29.3%	35.4%
Organized excursions	26.8%	25.3%	24.7%	22.3%	23.3%
Sea excursions / whale watching	22.1%	21.9%	23.8%	20.8%	21.5%
Hiking	--	15.4%	15.6%	15.9%	18.1%
Theme parks	17.5%	16.8%	17.7%	17.6%	17.2%
Museums / exhibitions	10.4%	9.6%	12.0%	11.1%	15.3%
Other Nature Activities	--	12.5%	10.8%	11.5%	14.5%
Wineries / markets / popular festivals	13.6%	11.2%	9.9%	14.0%	12.8%
Astronomical observation	7.4%	7.3%	6.7%	7.5%	9.1%
Nightlife / concerts / shows	10.1%	10.7%	10.5%	10.5%	8.6%
Scuba Diving	--	6.7%	7.0%	5.3%	8.3%
Practice other sports	--	7.3%	8.2%	6.9%	5.2%
Swim	--	4.0%	4.3%	3.7%	5.1%
Surf	--	4.7%	3.7%	4.2%	4.0%
Beauty and health treatments	4.7%	5.1%	5.8%	4.8%	2.5%
Cycling / Mountain bike	--	3.1%	2.1%	2.0%	2.1%
Running	--	2.4%	1.7%	2.8%	1.7%
Golf	--	1.5%	1.8%	2.7%	1.4%
Windsurf / Kitesurf	--	1.9%	1.5%	1.2%	1.3%

* Multi-choise question

Which island do they choose?

Tourists (≥ 16 year old)	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Lanzarote	55,227	39,107	36,763	35,507	38,772
Fuerteventura	140,922	155,579	136,963	147,695	150,752
Gran Canaria	129,692	128,461	129,384	125,844	133,989
Tenerife	121,375	100,126	107,246	120,393	122,694
La Palma	15,612	6,908	4,569	6,750	7,837



How many are loyal to the Canary Islands?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Repeat tourists	62.1%	62.3%	67.3%	62.3%	62.7%
At least 10 previous visits	10.3%	11.0%	11.0%	12.9%	11.6%
Repeat tourists (last 5 years)	55.1%	55.8%	58.5%	56.2%	56.5%
Repeat tourists (last 5 years)(5 or more visits)	10.6%	6.9%	8.5%	10.9%	11.9%

Who are they?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Gender					
Men	51.6%	50.3%	49.7%	51.5%	54.9%
Women	48.4%	49.7%	50.3%	48.5%	45.1%
Age					
Average age	41.4	40.2	40.0	41.0	41.1
Standard deviation	14.4	15.1	15.6	16.0	15.6
Age range					
16 - 24 years old	14.7%	19.2%	21.0%	20.1%	21.7%
25 - 30 years old	14.7%	15.4%	14.5%	12.4%	8.4%
31 - 45 years old	28.4%	28.9%	30.5%	30.7%	32.2%
46 - 60 years old	33.1%	25.7%	22.4%	22.9%	25.3%
Over 60 years old	9.0%	10.8%	11.5%	14.0%	12.5%
Occupation					
Salaried worker	67.6%	66.7%	64.0%	67.9%	63.7%
Self-employed	7.0%	7.1%	9.4%	6.1%	6.1%
Unemployed	0.4%	0.2%	0.7%	0.4%	1.1%
Business owner	11.8%	11.2%	13.1%	8.1%	12.2%
Student	5.9%	7.8%	6.2%	7.7%	7.0%
Retired	6.2%	6.0%	6.3%	8.8%	8.7%
Unpaid domestic work	0.9%	0.6%	0.1%	0.4%	0.5%
Others	0.2%	0.5%	0.2%	0.8%	0.7%
Annual household income level					
Less than €25,000	12.7%	12.8%	11.3%	13.0%	12.8%
€25,000 - €49,999	36.7%	31.6%	27.2%	29.3%	28.5%
€50,000 - €74,999	27.5%	33.3%	29.7%	30.6%	32.6%
More than €74,999	23.1%	22.3%	31.7%	27.1%	26.1%
Education level					
No studies	0.5%	0.3%	0.3%	0.5%	1.4%
Primary education	3.2%	2.7%	3.4%	2.8%	4.7%
Secondary education	27.4%	21.3%	26.4%	26.3%	23.4%
Higher education	68.9%	75.7%	69.9%	70.5%	70.4%

Source: Tourist Expenditure Survey (EGT, ISTAC).
Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

Share by islands	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Lanzarote	11.9%	9.1%	8.9%	8.1%	8.5%
Fuerteventura	30.4%	36.2%	33.0%	33.9%	33.2%
Gran Canaria	28.0%	29.9%	31.2%	28.9%	29.5%
Tenerife	26.2%	23.3%	25.8%	27.6%	27.0%
La Palma	3.4%	1.6%	1.1%	1.5%	1.7%

How many islands do they visit during their trip?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
One island	92.8%	92.8%	91.7%	94.9%	92.8%
Two islands	6.2%	6.4%	6.6%	4.5%	6.2%
Three or more islands	0.9%	0.8%	1.7%	0.6%	1.0%

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Average rating	8.58	8.70	8.61	8.59	8.59

Experience in the Canary Islands	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Worse or much worse than expected	1.7%	2.7%	2.9%	2.6%	3.0%
Lived up to expectations	52.2%	55.0%	53.2%	55.9%	54.0%
Better or much better than expected	46.2%	42.3%	43.9%	41.5%	42.9%

Future intentions (scale 0-10)	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Return to the Canary Islands	8.34	8.39	8.30	8.31	8.45
Recommend visiting the Canary Islands	8.80	8.83	8.69	8.71	8.80

Who do they come with?

	2019Q3	2022Q3	2023Q3	2024Q3	2025Q3
Unaccompanied	7.6%	6.6%	6.7%	9.1%	9.3%
Only with partner	45.8%	44.7%	44.5%	41.6%	32.4%
Only with children (< 13 years old)	7.8%	8.5%	6.8%	7.9%	10.0%
Partner + children (< 13 years old)	7.8%	8.0%	10.0%	10.3%	10.6%
Other relatives	5.1%	5.6%	5.7%	6.4%	8.8%
Friends	5.9%	7.6%	7.3%	5.6%	7.4%
Work colleagues	0.1%	0.2%	0.8%	0.0%	0.4%
Organized trip	0.1%	0.0%	0.0%	0.1%	0.1%
Other combinations (2)	19.8%	18.9%	18.2%	19.0%	21.0%

(2) Combination of some of the groups previously analyzed

Tourists with children	18.9%	19.3%	21.0%	23.0%	24.9%
- Between 0 and 2 years old	1.1%	1.1%	1.3%	0.7%	0.5%
- Between 3 and 12 years old	17.2%	17.4%	19.3%	21.9%	23.7%
- Between 0 -2 and 3-12 years old	0.6%	0.8%	0.4%	0.4%	0.7%
Tourists without children	81.1%	80.7%	79.0%	77.0%	75.1%
Group composition:					
- 1 person	9.6%	7.9%	7.6%	10.5%	10.2%
- 2 people	55.1%	56.8%	55.3%	50.3%	45.6%
- 3 people	17.4%	15.1%	18.9%	16.3%	19.3%
- 4 or 5 people	16.6%	18.2%	16.1%	20.3%	22.1%
- 6 or more people	1.4%	2.0%	2.0%	2.5%	2.8%
Average group size:	2.51	2.57	2.58	2.68	2.71

*People who share the main expenses of the trip