#### How many are they and how much do they spend? **أ**€

	2018Q1	2018Q2	2018Q3	2018Q4	2018
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.69	0.71	0.75	0.72	2.88
Tourist arrivals > 15 years old (EGT) (*)	0.62	0.59	0.60	0.65	2.46
- book holiday package <i>(*)</i>	0.34	0.32	0.36	0.34	1.36
<ul> <li>do not book holiday package (*)</li> </ul>	0.28	0.27	0.24	0.31	1.09
- % tourists who book holiday package	54.9%	54.2%	60.1%	52.8%	55.5%

(\*) Million of tourists

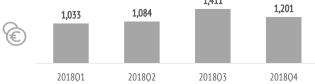


### % TOURISTS WHO BOOK HOLIDAY PACKAGE

2018Q1	ê	ê	ê	ê	ê	ê	Å	Å	ê	ê	55%
2018Q2	Å	Å	Å	Å	ê	ê	Å	Å	Å	Å	54%
2018Q3	ê	ê	ê	ê	ê	ê	ê	ê	Å	ê	60%
2018Q4	Å	Å	Å	Å	Å	ê	Å	Å	Å	Å	53%

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Expenditure per tourist (€)	1,033	1,084	1,411	1,201	1,182
<ul> <li>book holiday package</li> </ul>	1,066	1,183	1,521	1,358	1,287
<ul> <li>holiday package</li> </ul>	859	956	1,257	1,146	1,060
- others	207	227	263	211	228
<ul> <li>do not book holiday package</li> </ul>	992	967	1,245	1,026	1,051
- flight	223	273	365	293	286
- accommodation	420	353	444	398	402
- others	349	341	437	334	362
Average lenght of stay	9.09	8.68	9.23	8.25	8.80
<ul> <li>book holiday package</li> </ul>	8.23	8.51	8.86	7.89	8.38
<ul> <li>do not book holiday package</li> </ul>	10.13	8.87	9.79	8.65	9.33
Average daily expenditure (€)	126.6	135.6	162.7	158.3	146.0
<ul> <li>book holiday package</li> </ul>	134.4	147.2	177.5	181.0	160.6
<ul> <li>do not book holiday package</li> </ul>	117.0	121.9	140.4	132.9	127.8
Total turnover (> 15 years old) (€m)	636	640	848	781	2,904
<ul> <li>book holiday package</li> </ul>	360	378	550	466	1,754
- do not book holiday package	275	262	298	315	1,150





Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Climate	79.4%	75.5%	73.0%	81.5%	77.5%
Safety	52.1%	52.6%	57.9%	54.4%	54.3%
Tranquility	46.4%	47.5%	47.6%	48.9%	47.6%
Accommodation supply	42.6%	47.6%	50.8%	45.2%	46.5%
Price	36.0%	38.4%	41.7%	37.3%	38.3%
Sea	33.7%	34.7%	41.5%	38.3%	37.1%
Effortless trip	35.8%	35.7%	34.3%	38.6%	36.1%
European belonging	37.0%	34.8%	29.9%	38.6%	35.2%
Environment	31.5%	33.9%	34.7%	32.6%	33.1%
Landscapes	29.9%	28.7%	31.3%	30.8%	30.2%
Beaches	24.3%	28.1%	37.8%	29.8%	30.0%
Gastronomy	22.4%	20.6%	20.3%	22.1%	21.4%
Authenticity	20.2%	19.1%	22.3%	19.1%	20.2%
Fun possibilities	12.3%	16.2%	25.0%	15.5%	17.2%
Exoticism	7.2%	9.6%	11.2%	6.9%	8.6%
Historical heritage	8.0%	7.1%	9.2%	8.5%	8.2%
Culture	7.4%	8.2%	8.7%	7.8%	8.0%
Shopping	5.5%	7.9%	8.7%	6.3%	7.1%
Hiking trail network	6.6%	5.3%	4.2%	7.4%	5.9%
Nightlife	4.4%	4.9%	6.0%	3.9%	4.8%

Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very import

% of tourists who indicate that the factor is "very important" in their choice.

% TOURISTS WHO CHOOSE ACCOMMODATION SUPLLY



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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Rest	66.3%	60.4%	52.4%	58.4%	59.4%
Enjoy family time	6.5%	11.8%	19.4%	17.4%	13.8%
Have fun	3.6%	4.7%	6.4%	4.0%	4.7%
Explore the destination	18.7%	20.5%	19.2%	17.3%	18.9%
Practice their hobbies	1.9%	1.8%	1.7%	1.7%	1.7%
Other reasons	3.0%	0.8%	0.8%	1.2%	1.5%

How far in advance do they book their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
The same day	0.4%	0.4%	0.7%	0.1%	0.4%
Between 1 and 30 days	22.0%	15.8%	19.5%	15.9%	18.3%
Between 1 and 2 months	27.6%	22.7%	17.5%	22.6%	22.7%
Between 3 and 6 months	31.4%	37.8%	30.9%	34.0%	33.5%
More than 6 months	18.5%	23.4%	31.5%	27.3%	25.2%

## % TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



2018Q2 23.4% 2018Q4 27.3%



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# What channels did they use to get information about the trip? ${\sf Q}$

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Previous visits to the Canary Islands	62.1%	55.8%	51.8%	61.8%	58.0%
Friends or relatives	23.4%	26.7%	31.3%	25.3%	26.6%
Internet or social media	64.1%	62.8%	65.5%	62.2%	63.6%
Mass Media	1.6%	0.6%	1.2%	1.6%	1.2%
Travel guides and magazines	11.9%	10.4%	8.9%	10.6%	10.5%
Travel Blogs or Forums	5.9%	7.3%	8.0%	6.7%	7.0%
Travel TV Channels	0.5%	0.6%	0.6%	0.6%	0.6%
Tour Operator or Travel Agency	23.4%	25.6%	27.2%	26.5%	25.7%
Public administrations or similar	0.2%	0.2%	0.3%	0.5%	0.3%
Others	0.9%	2.5%	1.6%	1.6%	1.7%
* Multi-choise question					

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

	2018Q1	2018Q2	2018Q3	2018Q4	2018
<u>Flight</u>					
- Directly with the airline	43.5%	43.3%	38.8%	43.4%	42.3%
- Tour Operator or Travel Agency	56.5%	56.7%	61.2%	56.6%	57.7%
Accommodation					
- Directly with the accommodation	32.4%	31.4%	27.4%	31.9%	30.8%
- Tour Operator or Travel Agency	67.6%	68.6%	72.6%	68.1%	69.2%

Where do they stay?					Ħ
	2018Q1	2018Q2	2018Q3	2018Q4	2018
1-2-3* Hotel	11.4%	10.5%	9.1%	7.3%	9.5%
4* Hotel	41.4%	37.8%	35.6%	36.9%	37.9%
5* Hotel / 5* Luxury Hotel	5.0%	6.1%	6.9%	10.1%	7.1%
Aparthotel / Tourist Villa	30.1%	30.3%	34.7%	27.9%	30.7%
House/room rented in a private dwelli	4.7%	4.0%	4.4%	5.6%	4.7%
Private accommodation <sup>(1)</sup>	3.2%	3.7%	4.1%	4.4%	3.9%
Others (Cottage, cruise, camping,)	4.3%	7.5%	5.3%	7.7%	6.2%

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

What do they book?					101
	2018Q1	2018Q2	2018Q3	2018Q4	2018
Room only	29.3%	29.4%	30.0%	32.2%	30.3%
Bed and Breakfast	10.6%	12.3%	8.1%	9.7%	10.2%
Half board	22.8%	19.6%	18.2%	18.5%	19.8%
Full board	2.6%	2.0%	2.3%	2.0%	2.2%
All inclusive	34.6%	36.6%	41.3%	37.6%	37.5%

# 37.5% of tourists book all inclusive.



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**41.0%** 2018Q2





43.7%

2018Q3

### Other expenses

	2018Q1	2018Q2	2018Q3	2018Q4	TOTAL
Restaurants or cafes	67.6%	67.8%	66.6%	68.2%	67.6%
Supermarkets	56.0%	59.3%	59.0%	59.1%	58.3%
Car rental	34.9%	34.5%	33.7%	30.3%	33.3%
Organized excursions	23.9%	25.4%	32.4%	24.2%	26.4%
Taxi, transfer, chauffeur service	56.8%	55.3%	57.6%	53.1%	55.7%
Theme Parks	3.5%	4.6%	9.8%	5.1%	5.7%
Sport activities	6.2%	7.7%	8.3%	5.7%	6.9%
Museums	14.5%	12.2%	13.0%	13.2%	13.2%
Flights between islands	5.5%	7.5%	7.5%	6.0%	6.6%

# Activities in the Canary Islands

Outdoor time per day	2018Q1	2018Q2	2018Q3	2018Q4	2018
0 hours	1.3%	1.9%	2.3%	2.0%	1.8%
1 - 2 hours	10.1%	10.3%	13.9%	12.4%	11.7%
3 - 6 hours	36.7%	36.2%	35.3%	36.7%	36.2%
7 - 12 hours	45.5%	43.9%	40.5%	43.0%	43.2%
More than 12 hours	6.4%	7.8%	8.1%	6.0%	7.0%

#### 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



Activities in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Walk, wander	80.3%	80.2%	72.4%	76.3%	77.3%
Beach	53.1%	65.2%	76.3%	63.0%	64.3%
Swimming pool, hotel facilities	53.0%	68.0%	76.4%	60.4%	64.3%
Explore the island on their own	50.4%	50.1%	48.2%	49.1%	49.5%
Taste Canarian gastronomy	27.2%	29.6%	27.6%	26.2%	27.6%
Wineries/markets/popular festival	20.0%	19.7%	22.2%	18.4%	20.0%
Organized excursions	18.9%	19.3%	23.6%	17.7%	19.8%
Museums / exhibitions	21.2%	18.3%	19.1%	18.9%	19.4%
Sport activities	14.8%	15.5%	18.1%	14.9%	15.8%
Nightlife / concerts / shows	12.2%	13.6%	15.1%	11.3%	13.0%
Activities at sea	6.6%	7.9%	12.7%	8.8%	9.0%
Theme parks	4.9%	7.5%	13.9%	6.9%	8.3%
Nature activities	8.2%	7.3%	6.8%	7.5%	7.5%
Sea excursions / whale watching	3.6%	6.4%	11.1%	5.7%	6.7%
Beauty and health treatments	6.1%	6.0%	4.9%	4.6%	5.4%
Astronomical observation	1.7%	1.3%	2.8%	2.0%	2.0%

\* Multi-choise question

Taste Canarian gastronomy Activities at sea Sport activities Wineries/markets Swimping pool Sea excursions Explore the island

## Which places do they visit in Lanzarote?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Montaña del Fuego	36.4%	36.4%	37.8%	32.7%	35.7%
Arrecife	31.9%	28.7%	28.5%	30.0%	29.8%
Jameos del agua	27.9%	27.6%	30.4%	24.5%	27.6%
Mirador del Río	26.3%	24.8%	26.3%	23.1%	25.1%
Cueva de los Verdes	19.8%	22.0%	25.2%	18.6%	21.4%
Mercadillo de Teguise	22.2%	20.4%	23.4%	19.3%	21.3%
Jardín de Cactus	19.5%	20.1%	17.2%	16.5%	18.3%
Fundación César Manrique	18.2%	15.3%	13.5%	15.6%	15.7%
Monumento al Campesino	11.3%	10.1%	10.6%	10.0%	10.5%
Isla de La Graciosa	6.2%	7.8%	9.3%	6.1%	7.3%
Castillo de San José	4.2%	4.0%	4.3%	3.8%	4.1%

# 4 in 10 tourists in Lanzarote visit Montaña del Fuego (Ruta de los Volcanes)



2018Q1 36.4% 2018Q2 36.4% 2018Q3 37.8% 2018Q4 32.7%

#### Internet usage during their trip

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Research					
- Tourist package	15.2%	17.1%	17.8%	15.6%	16.4%
- Flights	14.6%	12.7%	14.9%	12.9%	13.8%
- Accommodation	19.8%	16.6%	19.7%	17.7%	18.4%
- Transport	13.6%	12.7%	17.0%	13.3%	14.2%
- Restaurants	25.6%	27.4%	32.5%	26.8%	28.2%
- Excursions	23.9%	28.9%	33.3%	24.5%	27.8%
- Activities	30.0%	33.7%	37.7%	28.8%	32.6%
Book or purchase					
- Tourist package	39.5%	34.8%	37.7%	38.5%	37.6%
- Flights	65.6%	69.3%	66.5%	67.7%	67.3%
- Accommodation	58.9%	60.9%	58.7%	60.6%	59.8%
- Transport	47.4%	52.1%	50.3%	49.6%	49.9%
- Restaurants	8.1%	9.1%	10.4%	11.2%	9.7%
- Excursions	7.5%	8.6%	12.5%	8.7%	9.5%
- Activities	7.4%	9.4%	12.2%	10.5%	10.0%
* Multi-choise question					
Internet usage in the Canary Islands	2018Q1	2018Q2	2018Q3	2018Q4	2018
Did not use the Internet	11.9%	10.3%	6.6%	7.8%	9.1%
Used the Internet	88.1%	89.7%	93.4%	92.2%	90.9%
- Own Internet connection	30.6%	32.5%	36.1%	32.4%	32.9%
- Free Wifi connection	48.1%	48.7%	46.7%	48.4%	48.0%
Applications*					
- Search for locations or maps	55.7%	59.9%	61.3%	61.2%	59.6%
- Search for destination info	46.2%	44.1%	50.5%	47.3%	47.1%
- Share pictures or trip videos	53.0%	54.3%	60.4%	54.4%	55.6%
- Download tourist apps	5.5%	7.6%	7.7%	6.9%	6.9%
- Others	29.5%	26.3%	21.1%	26.3%	25.7%
* Multi-choise question					

LATITUDE OF LIFE How many islands do they visit during their trip?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
One island	91.9%	90.5%	91.3%	91.7%	91.4%
Two islands	7.5%	8.8%	7.8%	7.9%	8.0%
Three or more islands	0.6%	0.7%	0.9%	0.3%	0.6%

### % TOURISTS VISITING MORE THAN ONE ISLAND

2018Q1	_	<u>`</u>	2018Q3
8.1%		$\phi \neq \phi$	 8.7%
2018Q2		<b>1</b>	 2018Q4
9.5%			 8.3%

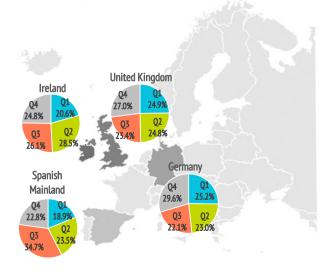
# How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Average rating	8.67	8.66	8.78	8.69	8.70
Experience in the Canary Islands	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Worse or much worse than expected	2.8%	3.3%	2.3%	2.4%	2.7%
Lived up to expectations	63.1%	58.5%	51.3%	59.4%	58.1%
Better or much better than expected	34.1%	38.2%	46.4%	38.2%	39.2%
Future intentions (scale 1-10)	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Return to the Canary Islands	8.73	8.68	8.67	8.84	8.73
Recommend visiting the Canary Islands	8.97	8.95	9.00	9.02	8.98

# How many are loyal to the Canary Islands?

	2018Q1	2018Q1	2018Q1	2018Q1	2018Q1
Repeat tourists	72.5%	66.8%	66.8%	72.3%	69.7%
Repeat tourists (last 5 years)	10.9%	8.6%	6.5%	11.5%	9.4%
Repeat tourists (last 5 years)(5 or more visits)	79.3%	73.7%	73.3%	79.2%	76.5%
At least 10 previous visits	22.1%	65.8%	13.6%	24.1%	20.0%

#### LANZAROTE: MAIN MARKETS % TOURISTS BY QUARTER OF TRIP





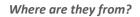
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	2018Q1	2018Q2	2018Q3	2018Q4	2018
United Kingdom	47.0%	48.8%	45.3%	48.2%	47.3%
Germany	12.0%	11.4%	10.8%	13.3%	11.9%
Ireland	7.9%	11.4%	10.2%	9.0%	9.6%
Spanish Mainland	6.8%	8.8%	12.7%	7.7%	9.0%
France	5.2%	5.8%	5.3%	3.7%	5.0%
Netherlands	4.7%	3.3%	3.8%	3.7%	3.9%
Italy	2.5%	2.9%	2.9%	2.4%	2.6%
Belgium	1.8%	1.6%	2.1%	1.9%	1.9%
Poland	2.0%	1.8%	1.8%	1.3%	1.7%
Switzerland	1.6%	1.2%	1.2%	1.9%	1.5%
Denmark	1.7%	0.4%	1.1%	1.7%	1.2%
Sweden	2.4%	0.3%	0.0%	1.2%	1.0%
Norway	1.4%	0.1%	0.1%	1.3%	0.8%
Finland	1.5%	0.2%	0.1%	0.9%	0.7%
Austria	0.2%	0.4%	0.4%	0.3%	0.3%
Czech Republic	0.2%	0.2%	0.5%	0.2%	0.3%
Russia	0.0%	0.0%	0.1%	0.1%	0.0%
Others	1.2%	1.4%	1.6%	1.3%	1.4%

# Who do they come with?

	2018Q1	2018Q2	2018Q3	2018Q4	2018
Unaccompanied	6.0%	5.6%	2.8%	4.5%	4.7%
Only with partner	63.6%	52.7%	33.6%	44.9%	48.7%
Only with children (< 13 years old)	3.1%	5.1%	9.9%	6.3%	6.1%
Partner + children (< 13 years old)	4.2%	6.8%	14.6%	10.2%	9.0%
Other relatives	7.2%	10.2%	13.6%	11.7%	10.7%
Friends	5.3%	5.2%	3.9%	4.3%	4.7%
Work colleagues	0.1%	0.1%	0.1%	0.1%	0.1%
Organized trip	0.3%	0.2%	0.1%	0.3%	0.2%
Other combinations (1)	10.3%	14.0%	21.4%	17.6%	15.8%
(1) Different situations have been isolated					
Tourists with children	10.3%	18.1%	37.0%	25.5%	22.7%
- Between 0 and 2 years old	1.7%	1.3%	2.0%	1.2%	1.6%
- Between 3 and 12 years old	8.0%	15.5%	32.3%	22.6%	19.6%
- Between 0 -2 and 3-12 years	0.6%	1.4%	2.7%	1.7%	1.6%
Tourists without children	89.7%	81.9%	63.0%	74.5%	77.3%
Group composition:					
- 1 person	8.9%	7.9%	4.4%	7.3%	7.1%
- 2 people	69.1%	57.3%	38.2%	48.4%	53.2%
- 3 people	8.2%	12.0%	19.2%	14.7%	13.5%
- 4 or 5 people	12.0%	19.0%	30.8%	23.3%	21.3%
- 6 or more people	1.9%	3.7%	7.4%	6.3%	4.8%
Average group size:	2.34	2.66	3.23	2.94	2.79

# 22.7% of tourists travel with children.

**?**?



2018Q1 10.3% 2018Q2 18.1% 37.0% 2018Q3 2018Q4 25.5%

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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

		ISLANDS - C					
Who are they?					¢		
	2018Q1	2018Q2	2018Q3	2018Q4	2018		
Gender							
Men	51.6%	49.6%	52.2%	51.4%	51.2%		
Women	48.4%	50.4%	47.8%	48.6%	48.8%		
Age							
Average age (tourist > 15 years old)	53.0	49.6	44.0	50.4	49.3		
Standard deviation	14.7	15.0	13.2	14.1	14.6		
Age range (> 15 years old)							
16 - 24 years old	2.7%	4.8%	7.9%	3.5%	4.7%		
25 - 30 years old	7.2%	9.1%	10.4%	5.5%	8.0%		
31 - 45 years old	19.7%	25.6%	36.3%	27.8%	27.3%		
46 - 60 years old	34.0%	33.8%	32.8%	37.7%	34.6%		
Over 60 years old	36.4%	26.6%	12.6%	25.6%	25.4%		
Occupation							
Salaried worker	46.0%	55.5%	65.5%	56.3%	55.8%		
Self-employed	10.4%	9.6%	10.5%	12.4%	10.8%		
Unemployed	0.8%	0.6%	1.2%	0.4%	0.7%		
Business owner	8.0%	8.0%	7.1%	6.7%	7.4%		
Student	1.6%	2.7%	5.5%	1.5%	2.8%		
Retired	32.0%	22.8%	8.8%	21.0%	21.2%		
Unpaid domestic work	0.7%	0.3%	1.1%	1.3%	0.8%		
Others	0.6%	0.5%	0.3%	0.4%	0.5%		
Annual household income level							
Less than €25,000	14.9%	13.9%	15.1%	12.1%	14.0%		
€25,000 - €49,999	39.7%	36.0%	36.1%	34.0%	36.4%		
€50,000 - €74,999	23.0%	27.4%	27.1%	26.4%	25.9%		
More than €74,999	22.5%	22.7%	21.8%	27.5%	23.7%		
Education level							
No studies	6.9%	7.8%	6.5%	6.1%	6.8%		
Primary education	2.5%	1.7%	1.3%	1.6%	1.8%		
Secondary education	24.5%	18.7%	19.8%	20.6%	20.9%		
Higher education	66.2%	71.8%	72.4%	71.8%	70.5%		
2018Q1				53.	0		





% OF TOURISTS WITH INCOMES OVER €74,999							
•	2018Q1	•	2018Q3				
•	2018Q2	•	2018Q4				



49.6

50.4

44.0

#### % SALARIED WORKED TOURISTS

2018Q1	ê	Å	ê	ê	ê	ê	Å	ŝ	ê	ê	46%
2018Q2	Å	Å	Å	Å	ê	ê	Å	Å	Å	ê	56%
2018Q3	Å	Å	Å	Å	Å	Å	ê	Å	Å	Å	66%
2018Q4	Å	Å	Å	Å	Å	ê	Å	Å	Å	ê	56%

