

Tourist profile trend (2017)

Lanzarote: Fourth Quarter



How many are they and how much do they spend?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR) (thousands)	518	559	605	707	743
Tourist arrivals (> 16 years old) (thousands)	482	467	527	601	658
Average daily expenditure (€)	124.63	131.97	129.22	141.11	142.94
. in their place of residence	87.64	94.84	92.57	106.10	106.15
. in the Canary Islands	37.00	37.12	36.65	35.01	36.79
Average lenght of stay	8.03	8.42	8.90	8.67	8.48
Turnover per tourist (€)	949	1,022	1,068	1,145	1,135
Total turnover (> 16 years old) (€m)	492	571	646	810	843

% tourists who pay in the Canary Islands:

Accommodation:

- Accommodation	14.7%	15.0%	12.9%	17.0%	12.0%
- Additional accommodation expenses	6.6%	6.9%	5.6%	6.2%	6.9%

Transport:

- Public transport	15.6%	16.9%	17.7%	16.3%	15.9%
- Taxi	28.2%	26.9%	26.4%	26.1%	27.6%
- Car rental	27.6%	26.9%	26.5%	23.9%	28.0%

Food and drink:

- Food purchases at supermarkets	70.9%	65.7%	61.3%	59.7%	59.2%
- Restaurants	62.6%	60.5%	62.6%	60.3%	63.6%

Souvenirs:	59.6%	64.9%	56.5%	51.8%	56.0%
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Leisure:

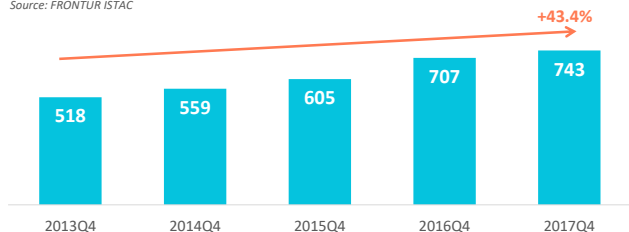
- Organized excursions	21.8%	23.9%	20.9%	21.5%	19.1%
- Leisure, amusement	7.8%	7.0%	5.8%	6.2%	5.4%
- Trip to other islands	3.0%	4.4%	3.1%	2.7%	3.5%
- Sporting activities	9.4%	7.1%	4.9%	6.3%	6.4%
- Cultural activities	10.5%	10.5%	10.0%	8.0%	9.9%
- Discos and disco-pubs	7.3%	6.7%	7.2%	2.6%	4.9%

Others:

- Wellness	7.6%	6.1%	5.3%	5.5%	5.5%
- Medical expenses	5.3%	4.3%	3.6%	5.9%	4.9%
- Other expenses	9.7%	12.4%	9.1%	7.8%	9.5%

TOURIST ARRIVALS (thousands)

Source: FRONTUR ISTAC



What do they book at their place of residence?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	4.9%	5.3%	4.8%	4.1%	4.9%
Flight and accommodation (room only)	32.2%	29.6%	32.7%	26.9%	31.7%
Flight and accommodation (B&B)	9.1%	8.9%	7.7%	7.6%	8.0%
Flight and accommodation (half board)	14.8%	18.5%	17.9%	18.5%	18.3%
Flight and accommodation (full board)	2.5%	2.8%	3.3%	3.8%	3.0%
Flight and accommodation (all inclusive)	36.4%	34.8%	33.7%	39.0%	34.0%
% Tourists using low-cost airlines	56.7%	55.6%	53.3%	50.3%	62.4%

Other expenses in their place of residence:

- Car rental	11.1%	10.6%	10.7%	10.9%	11.6%
- Sporting activities	7.2%	6.0%	5.0%	5.9%	6.1%
- Excursions	3.9%	4.1%	4.5%	4.3%	5.0%
- Trip to other islands	0.7%	0.4%	0.8%	1.0%	1.1%

How do they book?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	47.1%	48.2%	47.7%	45.8%	39.8%
- Tour Operator's website	85.6%	79.2%	79.9%	80.2%	81.1%
Accommodation	16.5%	18.2%	17.2%	18.8%	18.1%
- Accommodation's website	85.0%	85.2%	83.7%	84.3%	85.5%
Travel agency (High street)	15.1%	15.4%	16.8%	18.6%	19.8%
Online Travel Agency (OTA)	19.1%	16.6%	16.0%	14.2%	19.1%
No need to book accommodation	2.2%	1.7%	2.3%	2.6%	3.2%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	50.2%	51.3%	47.7%	48.3%	41.5%
- Tour Operator's website	85.2%	78.8%	81.2%	78.9%	79.0%
Airline	24.2%	25.1%	27.2%	26.0%	29.9%
- Airline's website	97.2%	98.0%	96.0%	97.9%	99.3%
Travel agency (High street)	13.2%	14.2%	15.6%	18.0%	17.7%
Online Travel Agency (OTA)	12.3%	9.4%	9.5%	7.7%	10.9%

How far in advance do they book their trip?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.5%	0.3%	0.5%	0.3%	0.3%
Between 2 and 7 days	10.3%	6.8%	6.4%	4.9%	3.6%
Between 8 and 15 days	11.5%	9.1%	7.4%	4.3%	4.3%
Between 16 and 30 days	18.5%	15.4%	14.3%	11.8%	10.9%
Between 31 and 90 days	36.7%	35.3%	36.0%	36.9%	37.0%
More than 90 days	22.5%	33.0%	35.4%	41.8%	43.9%

Who are they?



	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	57.8%	64.4%	50.8%	46.0%	48.9%
Women	42.2%	35.6%	49.2%	54.0%	51.1%

Age

Average age (tourists > 16 years old)	43.3	46.6	48.8	50.9	50.8
Standard deviation	13.8	13.7	14.6	14.2	14.6

Age range (> 16 years old)

16-24 years old	7.0%	4.6%	4.9%	3.0%	3.9%
25-30 years old	14.7%	10.4%	8.8%	5.6%	6.3%
31-45 years old	35.9%	31.5%	28.2%	28.0%	26.9%
46-60 years old	29.9%	35.8%	33.6%	35.4%	34.0%
Over 60 years old	12.6%	17.8%	24.6%	28.1%	28.9%

Occupation

Business owner or self-employed	28.4%	28.0%	25.4%	22.8%	25.9%
Upper/Middle management employee	38.6%	35.0%	32.4%	34.1%	30.7%
Auxiliary level employee	18.2%	14.7%	13.3%	12.9%	13.9%
Students	2.3%	3.3%	3.3%	1.9%	2.2%
Retired	10.7%	16.7%	23.2%	26.5%	25.4%
Unemployed / unpaid dom. work	1.7%	2.3%	2.3%	1.7%	1.8%

Annual household income level

€12,000 - €24,000	15.1%	16.4%	16.2%	13.7%	13.2%
€24,001 - €36,000	18.1%	17.1%	19.9%	17.2%	18.9%
€36,001 - €48,000	19.8%	14.9%	16.9%	16.5%	17.3%
€48,001 - €60,000	14.2%	15.4%	14.5%	14.9%	16.3%
€60,001 - €72,000	9.0%	9.8%	10.0%	10.3%	10.1%
€72,001 - €84,000	6.6%	7.7%	5.7%	7.7%	6.2%
More than €84,000	17.1%	18.7%	16.8%	19.7%	18.0%

Tourist profile trend (2017)

Lanzarote: Fourth Quarter



Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	482,417	467,397	527,062	600,909	658,457
- Fuerteventura	407,337	398,938	437,284	495,222	513,386
- Gran Canaria	901,778	863,399	951,656	1,064,140	1,108,297
- Tenerife	1,123,476	1,092,650	1,144,231	1,280,669	1,357,305
- La Palma	35,785	37,346	45,080	65,961	86,566

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	8.4%	7.7%	6.2%	6.5%	5.9%
4* Hotel	37.2%	37.9%	36.5%	41.8%	37.5%
1-2-3* Hotel	13.0%	14.7%	12.5%	9.1%	12.9%
Apartment	39.6%	37.8%	42.4%	40.6%	41.4%
Property (privately-owned, friends, family)	1.3%	1.5%	1.8%	1.1%	1.3%
Others	0.5%	0.4%	0.5%	0.8%	0.9%

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	5.7%	5.7%	5.7%	3.7%	6.5%
Only with partner	61.6%	53.9%	56.5%	49.2%	47.1%
Only with children (under the age of 13)	2.5%	1.5%	1.3%	1.1%	0.6%
Partner + children (under the age of 13)	8.8%	12.6%	11.6%	15.3%	12.9%
Other relatives	4.5%	5.1%	6.7%	7.9%	6.5%
Friends	5.1%	5.1%	3.9%	3.4%	4.8%
Work colleagues	0.2%	0.2%	0.2%	0.3%	0.1%
Other combinations ⁽¹⁾	11.6%	16.0%	14.2%	19.2%	21.4%

* Multi-choice question (different situations have been isolated)

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	96.2%	97.7%	96.3%	94.9%	97.2%
Average rating (scale 1-10)	8.96	9.10	9.14	8.97	9.19

How many are loyal to the Canary Islands?

Repeat tourists (previous visits)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 visit to the island	48.6%	51.6%	54.2%	56.0%	56.7%
At least 10 visits to the island	3.7%	5.6%	6.9%	7.7%	7.6%
At least 1 visit to the Canary Islands	80.4%	81.8%	82.8%	84.5%	83.2%
At least 10 visits to the Canary Islands	13.2%	17.4%	19.5%	19.0%	19.0%

Where are they from?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
United Kingdom	44.6%	47.3%	47.6%	47.2%	47.1%
Germany	14.5%	14.1%	13.5%	14.8%	14.1%
Ireland	7.7%	7.6%	8.3%	7.8%	8.1%
Spanish Mainland	9.7%	8.6%	7.3%	7.7%	6.9%
Netherlands	3.1%	3.5%	3.8%	3.8%	4.4%
France	3.5%	3.1%	4.6%	4.0%	3.6%
Italy	1.1%	1.4%	1.5%	2.3%	2.5%
Switzerland	1.2%	1.3%	1.7%	1.7%	2.2%
Denmark	1.5%	1.5%	1.7%	1.1%	1.8%
Others	13.2%	11.5%	10.0%	9.7%	9.4%

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	16.3%	16.3%	17.0%	17.1%	17.7%
- Fuerteventura	13.8%	14.0%	14.1%	14.1%	13.8%
- Gran Canaria	30.6%	30.2%	30.6%	30.3%	29.8%
- Tenerife	38.1%	38.2%	36.8%	36.5%	36.4%
- La Palma	1.2%	1.3%	1.5%	1.9%	2.3%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	94.5%	93.7%	96.1%	94.4%	95.2%
Tranquillity/rest/relaxation	46.4%	43.1%	40.7%	37.2%	46.0%
Beaches	25.2%	28.2%	27.1%	26.3%	26.2%
Scenery	25.3%	24.1%	24.8%	24.7%	24.8%
Visiting new places	15.8%	15.0%	14.3%	14.9%	13.6%
Ease of travel	16.6%	14.3%	15.4%	13.6%	13.3%
Price	19.4%	15.9%	17.7%	12.2%	11.6%
Quality of the environment	7.8%	8.7%	8.7%	9.4%	9.3%
Suitable destination for children	6.2%	9.0%	7.6%	11.9%	8.9%
Security	5.6%	6.5%	11.8%	11.8%	8.5%
Active tourism	2.8%	4.6%	3.9%	3.8%	4.3%
Culture	4.6%	4.7%	3.9%	3.8%	3.3%
Nightlife/fun	2.5%	2.4%	1.7%	2.3%	2.3%
Shopping	2.0%	1.4%	2.3%	2.2%	1.9%
Nautical activities	1.8%	2.0%	1.5%	1.7%	1.6%
Rural tourism	0.8%	1.5%	0.7%	0.7%	1.0%

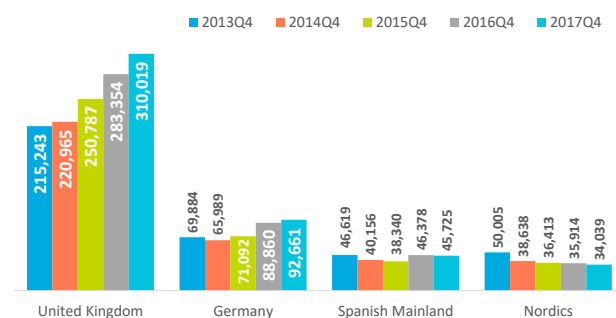
* Multi-choice question

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	69.6%	71.6%	72.8%	73.4%	72.7%
Recommendation by friends/relatives	37.4%	35.7%	35.5%	34.6%	34.6%
The Canary Islands television channel	0.1%	0.2%	0.4%	0.1%	0.1%
Other television or radio channels	0.5%	0.5%	0.3%	0.4%	0.7%
Information in press/magazines/books	4.6%	4.2%	3.8%	4.7%	2.7%
Attendance at a tourism fair	0.0%	0.2%	0.2%	0.4%	0.2%
Tour Operator's brochure or catalogue	7.9%	7.8%	8.1%	9.2%	6.1%
Recommendation by Travel Agency	7.4%	8.7%	9.4%	8.8%	8.0%
Information obtained via the Internet	36.1%	33.6%	28.6%	26.7%	27.3%
Senior Tourism programme	0.4%	0.4%	0.3%	0.1%	0.0%
Others	6.2%	5.2%	5.1%	4.8%	4.3%

* Multi-choice question

Main markets: tourist arrivals



Tourists over 16 years old.

Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed.

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