

Tourist profile trend (2016)

Lanzarote: First Quarter



How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	427,944	429,077	466,498	483,781	560,886
Average daily expenditure (€)	113.65	117.91	118.89	124.43	126.54
. in their place of residence	76.48	81.73	82.55	88.83	90.40
. in the Canary Islands	37.17	36.18	36.34	35.60	36.13
Average length of stay	8.66	9.50	9.16	9.32	9.85
Turnover per tourist (€)	906	1,017	994	1,044	1,129
Total turnover (> 16 years old) (€m)	388	436	464	505	633
Share of total turnover	22.9%	24.5%	24.2%	23.3%	24.5%
Share of total tourist	24.6%	23.6%	24.4%	23.8%	24.1%

Expenditure in the Canary Islands per tourist and trip (€) (*)

Accommodation (**):	30.17	33.72	41.28	35.12	52.67
- Accommodation	24.91	30.03	37.67	31.70	47.19
- Additional accommodation expenses	5.26	3.69	3.62	3.43	5.48
Transport:	29.85	31.06	28.97	35.78	32.47
- Public transport	3.37	5.13	3.91	4.61	4.82
- Taxi	6.94	7.94	6.68	8.12	8.06
- Car rental	19.53	18.00	18.39	23.05	19.59
Food and drink:	154.45	171.01	154.79	154.13	157.62
- Food purchases at supermarkets	57.04	71.30	55.25	51.17	65.06
- Restaurants	97.42	99.71	99.54	102.96	92.56
Souvenirs:	40.61	37.86	32.61	37.88	43.69
Leisure:	32.26	33.68	35.32	31.49	26.80
- Organized excursions	12.74	13.42	15.52	12.18	13.29
- Leisure, amusement	3.89	3.86	3.36	2.51	1.62
- Trip to other islands	1.46	1.87	1.85	2.13	2.07
- Sporting activities	2.82	4.76	4.47	4.74	3.76
- Cultural activities	4.27	4.21	2.76	3.98	3.58
- Discos and disco-pubs	7.09	5.56	7.36	5.94	2.48
Others:	13.85	15.91	13.53	14.48	10.79
- Wellness	2.38	3.35	4.37	2.80	3.60
- Medical expenses	2.05	2.36	2.04	2.10	1.68
- Other expenses	9.42	10.21	7.13	9.58	5.51

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.3%	0.5%	0.2%	0.5%	0.8%
Between 2 and 7 days	8.0%	7.4%	7.0%	7.3%	6.3%
Between 8 and 15 days	11.5%	7.8%	9.2%	8.8%	9.7%
Between 16 and 30 days	19.8%	17.9%	19.2%	14.9%	16.6%
Between 31 and 90 days	36.0%	36.2%	39.0%	35.7%	37.0%
More than 90 days	24.5%	30.3%	25.5%	32.8%	29.7%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	8.3%	8.5%	5.5%	5.3%	5.2%
Flight and accommodation (room only)	34.5%	35.2%	33.0%	33.1%	27.7%
Flight and accommodation (B&B)	7.6%	5.9%	10.5%	9.1%	9.0%
Flight and accommodation (half board)	17.4%	20.4%	16.7%	17.9%	20.9%
Flight and accommodation (full board)	1.9%	2.7%	3.5%	3.3%	3.7%
Flight and accommodation (all inclusive)	30.4%	27.3%	30.8%	31.2%	33.6%
% Tourists using low-cost airlines	43.7%	47.0%	51.6%	53.7%	50.6%
Other expenses in their place of residence:					
- Car rental	11.8%	11.1%	11.1%	11.4%	10.2%
- Sporting activities	5.5%	7.1%	5.0%	5.1%	4.1%
- Excursions	2.8%	3.6%	4.1%	4.2%	3.5%
- Trip to other islands	0.4%	0.6%	0.6%	0.8%	0.6%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	49.2%	43.3%	50.8%	48.5%	44.7%
- Tour Operator's website	74.4%	80.6%	87.3%	76.2%	76.8%
Accommodation	16.5%	19.2%	16.1%	17.7%	18.9%
- Accommodation's website	85.1%	85.3%	86.7%	84.8%	84.8%
Travel agency (High street)	15.0%	18.4%	13.6%	16.0%	17.9%
Online Travel Agency (OTA)	15.1%	15.9%	17.8%	16.0%	15.4%
No need to book accommodation	4.2%	3.0%	1.6%	1.8%	3.0%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	58.0%	45.0%	52.6%	49.8%	46.7%
- Tour Operator's website	73.0%	78.1%	83.7%	75.1%	75.6%
Airline	20.6%	27.5%	23.2%	26.5%	25.7%
- Airline's website	97.0%	96.6%	96.4%	97.5%	98.3%
Travel agency (High street)	11.9%	15.3%	12.9%	14.1%	17.7%
Online Travel Agency (OTA)	9.5%	12.2%	11.3%	9.6%	9.9%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	6.9%	6.4%	7.5%	5.8%	5.1%
4* Hotel	31.0%	31.0%	34.7%	35.4%	39.9%
1-2-3* Hotel	12.3%	11.9%	14.6%	15.1%	12.8%
Apartment	45.8%	46.6%	41.8%	41.9%	40.0%
Property (privately-owned, friends, family)	3.3%	2.7%	1.1%	1.2%	1.6%
Others	0.8%	1.3%	0.4%	0.5%	0.5%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	64.5%	61.1%	56.4%	56.0%	48.8%
Percentage of women	35.5%	38.9%	43.6%	44.0%	51.2%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Age					
Average age (tourists > 16 years old)	45.8	47.6	49.1	50.6	55.2
Standard deviation	13.6	13.9	14.6	14.2	15.0

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Age range (> 16 years old)					
16-24 years old	5.2%	5.5%	3.6%	3.5%	3.0%
25-30 years old	11.0%	7.4%	8.5%	7.2%	5.4%
31-45 years old	33.2%	33.0%	28.2%	24.4%	17.8%
46-60 years old	34.4%	32.9%	35.6%	37.7%	31.4%
Over 60 years old	16.2%	21.2%	24.0%	27.3%	42.4%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Occupation					
Business owner or self-employed	25.8%	22.9%	25.0%	23.4%	21.4%
Upper/Middle management employee	37.3%	36.1%	35.2%	31.8%	26.3%
Auxiliary level employee	16.0%	15.5%	13.5%	15.3%	9.7%
Students	2.5%	3.9%	2.5%	2.7%	1.9%
Retired	17.0%	20.2%	22.7%	25.9%	39.4%
Unemployed / unpaid dom. work	1.3%	1.5%	1.1%	1.0%	1.3%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Annual household income level					
€12,000 - €24,000	15.6%	17.7%	14.1%	15.3%	14.1%
€24,001 - €36,000	21.1%	18.9%	16.6%	16.8%	22.4%
€36,001 - €48,000	16.6%	14.8%	19.4%	19.1%	18.0%
€48,001 - €60,000	15.4%	17.4%	16.8%	14.9%	15.0%
€60,001 - €72,000	10.5%	8.3%	8.9%	10.5%	9.0%
€72,001 - €84,000	7.3%	8.8%	8.1%	6.6%	6.3%
More than €84,000	13.4%	14.2%	16.2%	16.7%	15.2%

(*) Expense is prorated among all the tourists (even those who have not spent in destination).

(**) Accommodation expenses may seem low because most tourists pay the accommodation before traveling.

Tourist profile trend (2016)

Lanzarote: First Quarter



Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	427,944	429,077	466,498	483,781	560,886
- Fuerteventura	372,165	366,481	363,967	394,726	473,171
- Gran Canaria	828,230	819,171	895,237	871,881	991,937
- Tenerife	1,085,591	1,059,587	1,150,121	1,179,865	1,261,312
- La Palma	40,340	48,806	36,356	42,548	61,898

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	15.5%	15.8%	16.0%	16.3%	16.7%
- Fuerteventura	13.5%	13.5%	12.5%	13.3%	14.1%
- Gran Canaria	30.1%	30.1%	30.7%	29.3%	29.6%
- Tenerife	39.4%	38.9%	39.5%	39.7%	37.7%
- La Palma	1.5%	1.8%	1.2%	1.4%	1.8%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	6.1%	9.1%	5.0%	5.7%	4.8%
Only with partner	62.8%	62.7%	61.0%	63.8%	62.9%
Only with children (under the age of 13)	0.4%	0.4%	0.9%	0.6%	0.7%
Partner + children (under the age of 13)	10.3%	9.7%	9.9%	8.0%	7.5%
Other relatives	4.0%	4.7%	3.5%	4.4%	5.3%
Friends	4.8%	4.1%	5.1%	6.7%	5.7%
Work colleagues	0.2%	0.2%	0.3%	0.2%	0.4%
Other combinations ⁽¹⁾	11.4%	9.1%	14.2%	10.6%	12.7%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	93.3%	96.2%	96.1%	93.9%	94.9%
Average rating (scale 1-10)	8.77	9.12	8.98	8.82	9.06

How many are loyal to the destination?

Repeat tourists of the island	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	54.2%	55.9%	53.6%	55.1%	58.9%
In love (at least 10 previous visits)	4.7%	6.4%	5.5%	6.3%	6.7%

Where are they from?



Ten main source markets	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
United Kingdom	189,305	188,966	205,313	221,213	259,030
Germany	64,715	68,842	69,337	71,353	77,865
Spanish Mainland	52,547	44,342	32,812	32,191	45,200
Ireland	37,100	35,931	34,251	40,764	43,512
France	6,734	11,554	19,948	23,498	33,871
Netherlands	14,775	15,217	16,638	16,365	21,248
Sweden	12,450	5,910	20,091	16,811	19,490
Denmark	5,080	13,039	10,189	9,500	11,420
Italy	6,010	3,846	3,999	5,382	8,931
Belgium	6,466	5,480	4,432	7,231	8,818

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	94.5%	96.2%	96.0%	94.0%	95.2%
Tranquillity/rest/relaxation	46.9%	44.2%	45.9%	42.8%	39.8%
Scenery	23.3%	24.9%	23.1%	25.8%	25.1%
Beaches	20.7%	20.5%	23.1%	18.9%	18.9%
Ease of travel	15.8%	15.2%	14.8%	14.1%	16.8%
Price	19.1%	17.0%	19.5%	17.1%	16.5%
Visiting new places	15.1%	12.8%	14.0%	15.3%	13.4%
Security	4.5%	8.3%	5.9%	6.7%	12.1%
Quality of the environment	8.9%	11.2%	8.9%	9.8%	11.7%
Suitable destination for children	6.3%	5.5%	6.4%	5.1%	5.7%
Active tourism	3.9%	6.4%	5.6%	5.4%	5.3%
Culture	3.8%	4.4%	3.6%	6.0%	4.6%
Nightlife/fun	3.0%	2.0%	3.3%	3.0%	2.5%
Shopping	2.2%	1.1%	2.0%	2.7%	2.0%
Nautical activities	1.1%	1.7%	1.9%	1.1%	1.3%
Rural tourism	1.3%	1.4%	0.9%	1.4%	1.1%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	73.5%	74.5%	75.0%	74.1%	75.8%
Recommendation by friends or relatives	32.7%	36.5%	31.8%	33.5%	29.3%
The Canary Islands television channel	0.2%	0.2%	0.1%	0.3%	0.3%
Other television or radio channels	0.1%	0.7%	0.5%	0.4%	0.9%
Information in the press/magazines/books	4.9%	4.5%	5.9%	4.2%	4.1%
Attendance at a tourism fair	0.6%	0.1%	0.3%	0.1%	0.4%
Tour Operator's brochure or catalogue	9.0%	6.9%	9.3%	7.1%	10.5%
Recommendation by Travel Agency	8.4%	6.5%	5.9%	8.4%	7.7%
Information obtained via the Internet	32.5%	29.6%	34.2%	28.9%	26.0%
Senior Tourism programme	0.4%	0.7%	0.7%	0.4%	0.3%
Others	4.8%	4.1%	4.2%	4.8%	6.0%

* Multi-choice question

Share of tourists (> 16 years old) by quarter of trip



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.