

Tourist profile trend (2017)

Lanzarote: Third Quarter



How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	491,243	508,699	544,296	604,857	645,448
Average daily expenditure (€)	117.49	124.12	135.00	133.41	132.20
. in their place of residence	82.64	89.95	102.52	96.99	97.16
. in the Canary Islands	34.85	34.18	32.48	36.42	35.03
Average length of stay	9.72	9.14	9.33	9.38	8.89
Turnover per tourist (€)	1,060	1,066	1,174	1,155	1,098
Total turnover (> 16 years old) (€m)	521	542	639	699	709
Share of total turnover	29.2%	28.2%	29.5%	27.1%	--
Share of total tourist	27.0%	26.6%	26.8%	26.0%	--

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

Accommodation (**):	41.97	28.45	31.26	50.99	42.64
- Accommodation	37.34	23.26	26.25	44.13	38.59
- Additional accommodation expenses	4.63	5.19	5.01	6.86	4.05
Transport:	30.03	24.24	28.92	28.51	25.92
- Public transport	4.84	2.40	4.27	4.53	3.31
- Taxi	7.60	7.47	7.23	6.95	7.10
- Car rental	17.59	14.36	17.42	17.04	15.52
Food and drink:	149.23	139.02	128.45	146.41	143.71
- Food purchases at supermarkets	65.19	50.91	45.19	55.81	53.07
- Restaurants	84.04	88.11	83.26	90.60	90.63
Souvenirs:	43.07	50.31	44.46	40.30	38.57
Leisure:	45.07	43.82	41.14	41.03	33.56
- Organized excursions	20.73	21.97	19.94	20.57	15.48
- Leisure, amusement	4.78	4.25	4.48	3.66	3.79
- Trip to other islands	3.17	1.78	1.61	2.77	1.83
- Sporting activities	4.86	4.57	2.67	4.96	5.58
- Cultural activities	3.96	4.17	4.49	4.69	2.63
- Discos and disco-pubs	7.57	7.07	7.94	4.38	4.24
Others:	15.40	10.35	12.78	10.31	9.19
- Wellness	2.27	2.18	3.05	3.34	2.38
- Medical expenses	1.61	1.43	0.85	1.05	0.98
- Other expenses	11.51	6.74	8.88	5.93	5.83

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.1%	0.4%	0.4%	0.4%	0.4%
Between 2 and 7 days	6.9%	7.5%	4.7%	4.2%	5.3%
Between 8 and 15 days	9.9%	8.8%	8.3%	5.6%	7.0%
Between 16 and 30 days	14.7%	15.4%	12.9%	10.9%	11.0%
Between 31 and 90 days	32.6%	30.3%	31.1%	31.2%	32.0%
More than 90 days	35.7%	37.6%	42.6%	47.8%	44.4%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	6.0%	4.1%	3.3%	3.8%	5.0%
Flight and accommodation (room only)	31.8%	29.1%	26.5%	28.8%	31.2%
Flight and accommodation (B&B)	6.6%	5.9%	6.5%	6.5%	7.0%
Flight and accommodation (half board)	16.4%	16.3%	14.4%	17.4%	16.7%
Flight and accommodation (full board)	2.7%	2.8%	3.3%	3.5%	2.9%
Flight and accommodation (all inclusive)	36.5%	41.9%	46.1%	40.0%	37.2%
% Tourists using low-cost airlines	58.1%	56.5%	53.4%	54.9%	57.5%
Other expenses in their place of residence:					
- Car rental	11.8%	11.1%	8.4%	11.8%	10.7%
- Sporting activities	6.0%	5.9%	6.3%	6.3%	6.3%
- Excursions	5.4%	5.6%	5.0%	4.9%	4.0%
- Trip to other islands	1.2%	1.4%	0.6%	1.3%	1.0%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	40.6%	44.4%	46.5%	42.9%	39.3%
- Tour Operator's website	79.8%	80.0%	79.3%	80.5%	79.6%
Accommodation	17.5%	14.5%	16.4%	18.4%	18.7%
- Accommodation's website	83.3%	79.7%	84.1%	87.3%	85.0%
Travel agency (High street)	20.7%	21.3%	19.9%	20.7%	20.8%
Online Travel Agency (OTA)	18.7%	18.1%	15.5%	15.6%	18.1%
No need to book accommodation	2.4%	1.7%	1.7%	2.4%	3.1%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	43.4%	46.1%	48.3%	44.9%	41.4%
- Tour Operator's website	79.4%	77.5%	77.7%	79.4%	77.5%
Airline	28.6%	23.5%	23.5%	27.6%	27.6%
- Airline's website	97.3%	97.4%	96.7%	98.3%	97.4%
Travel agency (High street)	17.5%	18.7%	17.7%	18.5%	20.1%
Online Travel Agency (OTA)	10.4%	11.7%	10.5%	9.0%	10.9%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	7.3%	8.1%	7.3%	7.4%	7.0%
4* Hotel	34.5%	35.6%	39.1%	38.6%	36.2%
1-2-3* Hotel	12.2%	13.5%	15.5%	9.3%	13.1%
Apartment	43.8%	41.3%	36.4%	42.7%	41.4%
Property (privately-owned, friends, family)	1.9%	1.3%	1.5%	1.3%	1.5%
Others	0.2%	0.2%	0.2%	0.7%	0.8%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	64.7%	52.1%	49.5%	43.9%	48.2%
Percentage of women	35.3%	47.9%	50.5%	56.1%	51.8%

Age					
Average age (tourists > 16 years old)	38.4	40.5	42.0	46.2	45.4
Standard deviation	12.5	12.5	12.3	14.6	14.7

Age range (> 16 years old)					
16-24 years old	15.3%	11.4%	8.6%	7.4%	8.9%
25-30 years old	17.9%	15.4%	12.2%	11.1%	9.8%
31-45 years old	34.5%	38.7%	41.0%	38.9%	31.7%
46-60 years old	28.3%	28.7%	31.1%	25.2%	32.8%
Over 60 years old	4.0%	5.8%	7.1%	17.4%	16.8%

Occupation					
Business owner or self-employed	25.3%	25.2%	26.6%	23.2%	28.1%
Upper/Middle management employee	37.5%	39.3%	41.0%	35.0%	35.8%
Auxiliary level employee	20.9%	21.1%	19.1%	18.5%	14.8%
Students	8.7%	6.1%	4.3%	4.7%	5.0%
Retired	3.8%	5.1%	6.5%	16.6%	14.2%
Unemployed / unpaid dom. work	3.7%	3.1%	2.6%	1.9%	2.1%

Annual household income level					
€12,000 - €24,000	17.7%	18.9%	14.9%	16.7%	17.5%
€24,001 - €36,000	22.0%	24.9%	16.9%	19.4%	19.5%
€36,001 - €48,000	17.4%	15.9%	16.3%	16.0%	16.1%
€48,001 - €60,000	18.0%	14.3%	14.9%	16.1%	15.5%
€60,001 - €72,000	9.2%	8.9%	12.5%	11.3%	9.9%
€72,001 - €84,000	5.3%	4.6%	7.1%	5.3%	6.6%
More than €84,000	10.3%	12.5%	17.4%	15.2%	14.9%

(*) 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 (2017)

Lanzarote: Third Quarter



Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	491,243	508,699	544,296	604,857	645,448
- Fuerteventura	411,931	440,855	447,593	484,107	493,948
- Gran Canaria	625,351	656,504	675,982	847,744	910,485
- Tenerife	933,438	997,622	987,323	1,184,832	1,237,883
- La Palma	33,517	35,685	38,837	46,789	57,969

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	19.7%	19.3%	20.2%	19.1%	19.3%
- Fuerteventura	16.5%	16.7%	16.6%	15.3%	14.8%
- Gran Canaria	25.1%	24.9%	25.1%	26.8%	27.2%
- Tenerife	37.4%	37.8%	36.6%	37.4%	37.0%
- La Palma	1.3%	1.4%	1.4%	1.5%	1.7%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	4.5%	2.5%	3.3%	3.0%	3.3%
Only with partner	51.3%	44.2%	39.2%	42.3%	41.2%
Only with children (under the age of 13)	1.1%	2.3%	1.5%	2.0%	2.2%
Partner + children (under the age of 13)	16.9%	17.5%	24.4%	18.9%	19.3%
Other relatives	4.5%	6.5%	5.8%	6.8%	6.0%
Friends	4.6%	4.8%	3.6%	4.5%	3.9%
Work colleagues	0.0%	0.3%	0.1%	0.0%	0.1%
Other combinations ⁽¹⁾	17.1%	22.0%	22.1%	22.5%	24.0%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	95.2%	96.3%	96.2%	97.2%	93.1%
Average rating (scale 1-10)	8.98	9.03	9.08	9.14	8.95

How many are loyal to the destination?

Repeat tourists of the island	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	47.0%	43.6%	47.3%	50.9%	50.1%
In love (at least 10 previous visits)	4.1%	3.6%	4.1%	4.1%	5.4%

Where are they from?



Ten main source markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
United Kingdom	222,476	234,088	269,333	297,765	325,356
Spanish Mainland	85,322	86,002	75,022	77,779	69,209
Germany	51,912	57,804	53,320	63,320	65,213
Ireland	51,712	51,196	50,449	54,585	58,981
France	17,683	18,718	33,565	33,723	31,902
Netherlands	16,389	13,759	16,440	20,812	21,499
Italy	9,951	8,975	9,113	16,136	20,371
Belgium	6,335	7,336	8,594	9,252	12,849
Poland	1,555	6,698	6,022	3,218	11,812
Switzerland	5,727	6,505	6,973	7,743	8,856

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	89.0%	88.8%	89.3%	88.5%	89.4%
Tranquillity/rest/relaxation	42.5%	39.8%	37.0%	36.3%	37.0%
Beaches	33.9%	35.2%	32.2%	31.2%	32.9%
Scenery	22.3%	24.5%	25.2%	23.8%	25.9%
Visiting new places	19.7%	21.6%	18.4%	18.4%	19.5%
Price	20.3%	19.4%	17.7%	16.2%	16.7%
Suitable destination for children	11.6%	14.8%	16.8%	13.9%	13.6%
Ease of travel	8.6%	9.2%	8.4%	12.8%	10.5%
Quality of the environment	8.5%	9.1%	9.3%	9.5%	9.8%
Security	3.8%	3.9%	9.5%	12.1%	9.9%
Culture	4.2%	4.2%	4.5%	4.1%	4.8%
Nightlife, fun	4.5%	3.5%	2.9%	1.6%	2.8%
Active tourism	4.7%	2.7%	3.0%	2.0%	2.7%
Nautical activities	2.5%	1.6%	2.2%	2.5%	2.1%
Shopping	1.3%	2.3%	1.6%	1.3%	2.4%
Rural tourism	1.6%	1.1%	0.5%	1.5%	1.3%

* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	63.8%	59.4%	60.3%	63.3%	65.0%
Recommendation by friends or relatives	41.8%	44.9%	37.5%	41.0%	40.0%
The Canary Islands television channel	0.3%	0.4%	0.2%	0.1%	0.2%
Other television or radio channels	0.7%	0.5%	0.7%	1.2%	0.5%
Information in the press/magazines/books	4.1%	3.7%	3.5%	3.6%	3.7%
Attendance at a tourism fair	0.8%	0.1%	0.3%	0.2%	0.3%
Tour Operator's brochure or catalogue	10.7%	11.8%	12.7%	10.9%	10.5%
Recommendation by Travel Agency	11.6%	12.1%	10.9%	10.9%	10.1%
Information obtained via the Internet	32.7%	34.9%	31.6%	27.2%	30.2%
Senior Tourism programme	0.1%	0.1%	0.1%	0.1%	0.2%
Others	5.6%	3.3%	4.4%	4.1%	4.3%

* 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.