

TOURIST PROFILE BY SOURCE MARKETS (2019)

LANZAROTE: MAIN SOURCE MARKETS



How many are they and how much do they spend?

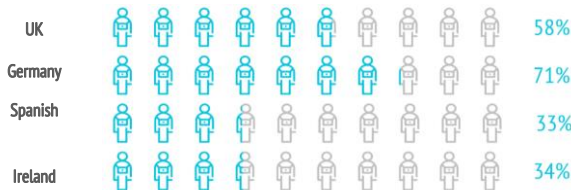


	UK	Germany	Spain	Ireland	Lanzarote
TOURISTS					
Tourist arrivals (FRONTUR) (*)	1,406	306	296	310	2,913
Tourist arrivals > 15 years old (EGT) (*)	1,216	275	260	256	2,522
- book holiday package (*)	703	195	86	86	1,352
- do not book holiday package (*)	512	79	174	170	1,169
- % tourists who book holiday package	57.9%	71.2%	33.1%	33.6%	53.6%

(*) Thousands of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE

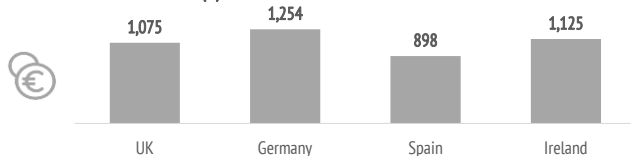


	UK	Germany	Spain	Ireland	Lanzarote
Expenditure per tourist (€)	1,075	1,254	898	1,125	1,089
- book holiday package	1,181	1,311	1,073	1,103	1,200
- holiday package	975	1,097	868	780	982
- others	206	215	205	323	218
- do not book holiday package	929	1,114	811	1,136	962
- flight	246	296	225	293	258
- accommodation	344	348	300	432	348
- others	339	470	286	412	356
Average length of stay	8.61	10.61	7.47	9.00	8.75
- book holiday package	8.23	9.84	6.90	7.70	8.36
- do not book holiday package	9.15	12.49	7.75	9.65	9.21
Average daily expenditure (€)	134.3	129.9	133.8	139.8	135.3
- book holiday package	149.4	140.8	164.2	147.5	150.6
- do not book holiday package	113.6	103.0	118.7	135.9	117.6
Total turnover (> 15 years old) (€m)	1,307	344	233	288	2,747
- book holiday package	831	256	92	95	1,622
- do not book holiday package	476	88	141	193	1,125

AVERAGE LENGTH OF STAY (nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

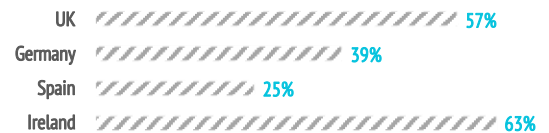


	UK	Germany	Spain	Ireland	Lanzarote
Climate	80.4%	76.1%	64.1%	80.9%	77.5%
Safety	63.1%	54.7%	34.0%	67.0%	55.7%
Tranquility	48.3%	52.3%	56.4%	56.4%	49.8%
Accommodation supply	56.5%	38.7%	25.0%	62.6%	47.6%
Price	49.3%	25.2%	25.5%	57.1%	41.2%
Sea	32.4%	56.9%	42.9%	38.5%	39.4%
Effortless trip	43.8%	41.4%	22.1%	45.7%	37.5%
Environment	35.2%	30.7%	42.4%	34.3%	35.8%
European belonging	32.7%	39.2%	33.0%	45.6%	34.5%
Landscapes	21.9%	42.2%	53.4%	17.3%	32.0%
Beaches	27.8%	38.3%	37.9%	35.2%	32.0%
Gastronomy	25.1%	21.7%	24.1%	27.8%	24.0%
Authenticity	19.7%	23.5%	34.8%	21.6%	23.3%
Fun possibilities	19.1%	12.3%	14.7%	25.7%	17.9%
Exoticism	6.9%	7.8%	17.6%	9.2%	10.1%
Historical heritage	7.4%	11.1%	18.0%	6.1%	9.2%
Culture	8.8%	9.3%	13.4%	7.0%	9.2%
Shopping	7.9%	6.2%	5.5%	14.0%	7.7%
Hiking trail network	3.2%	9.6%	10.5%	4.1%	6.7%
Nightlife	6.7%	2.2%	3.7%	10.4%	5.5%

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

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

% TOURISTS WHO CHOOSE ACCOMMODATION SUPPLY



What is the main motivation for their holidays?



	UK	Germany	Spain	Ireland	Lanzarote
Rest	69.6%	38.4%	34.1%	70.9%	56.3%
Enjoy family time	13.6%	9.0%	15.6%	16.2%	13.2%
Have fun	5.8%	3.7%	5.6%	8.1%	5.9%
Explore the destination	8.2%	41.8%	40.1%	4.1%	20.8%
Practice their hobbies	1.4%	5.6%	3.0%	0.1%	2.3%
Other reasons	1.4%	1.5%	1.6%	0.7%	1.5%

% TOURISTS TRAVELLING TO EXPLORE THE ISLANDS



How far in advance do they book their trip?



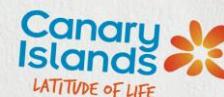
	UK	Germany	Spain	Ireland	Lanzarote
The same day	0.2%	0.5%	0.9%	0.0%	0.4%
Between 1 and 30 days	17.7%	20.2%	26.0%	19.8%	20.6%
Between 1 and 2 months	19.3%	22.2%	32.4%	22.2%	22.8%
Between 3 and 6 months	34.0%	34.6%	31.3%	37.9%	34.1%
More than 6 months	28.8%	22.5%	9.4%	20.1%	22.2%

Source: Encuesta sobre el Gasto Turístico (ISTAC).

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

TOURIST PROFILE BY SOURCE MARKETS (2019)

LANZAROTE: MAIN SOURCE MARKETS



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

	UK	Germany	Spain	Ireland	Lanzarote
Previous visits to the Canary Islands	66.8%	54.1%	41.8%	69.1%	58.4%
Friends or relatives	26.4%	23.3%	35.7%	26.9%	27.2%
Internet or social media	63.7%	56.5%	56.2%	56.0%	61.3%
Mass Media	1.5%	1.3%	1.1%	1.6%	1.5%
Travel guides and magazines	8.4%	18.4%	5.6%	4.2%	10.2%
Travel Blogs or Forums	4.7%	6.4%	13.0%	5.0%	6.8%
Travel TV Channels	0.7%	1.4%	0.3%	0.7%	0.7%
Tour Operator or Travel Agency	23.3%	33.7%	14.2%	15.6%	23.1%
Public administrations or similar	0.2%	0.3%	1.9%	0.1%	0.4%
Others	2.6%	1.7%	2.2%	1.3%	2.1%

* Multi-choise question

With whom did they book their flight and accommodation? 🗣️

	UK	Germany	Spain	Ireland	Lanzarote
Flight					
- Directly with the airline	45.0%	27.1%	61.2%	67.7%	46.5%
- Tour Operator or Travel Agency	55.0%	72.9%	38.8%	32.3%	53.5%
Accommodation					
- Directly with the accommodation	31.2%	17.2%	49.2%	54.0%	34.5%
- Tour Operator or Travel Agency	68.8%	82.8%	50.8%	46.0%	65.5%

Where do they stay? 🛏️

	UK	Germany	Spain	Ireland	Lanzarote
1-2-3* Hotel	5.9%	5.5%	5.0%	4.9%	6.3%
4* Hotel	38.9%	52.2%	38.6%	32.5%	39.2%
5* Hotel / 5* Luxury Hotel	10.1%	10.0%	12.8%	5.7%	9.6%
Aparthotel / Tourist Villa	30.8%	13.8%	16.1%	48.4%	27.3%
House/room rented in a private dwelling	4.8%	8.3%	8.6%	4.6%	6.3%
Private accommodation (1)	4.5%	5.7%	11.7%	1.8%	5.2%
Others (Cottage, cruise, camping,...)	5.0%	4.5%	7.0%	2.1%	6.1%

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

What do they book? 🗣️

	UK	Germany	Spain	Ireland	Lanzarote
Room only	29.2%	18.1%	26.7%	43.6%	29.1%
Bed and Breakfast	9.0%	7.9%	10.8%	22.1%	10.9%
Half board	16.8%	30.6%	24.8%	14.4%	19.4%
Full board	1.7%	1.8%	6.5%	3.3%	3.1%
All inclusive	43.3%	41.6%	31.1%	16.6%	37.5%



37.5% of tourists book all inclusive.



43%
UK



31%
Spanish Mainland



42%
Germany



17%
Ireland

Other expenses 📍

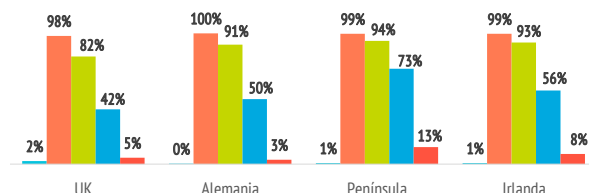
	UK	Germany	Spain	Ireland	Lanzarote
Restaurants or cafes	62.6%	54.1%	64.4%	76.5%	62.7%
Supermarkets	55.5%	56.7%	50.5%	63.0%	56.1%
Car rental	19.8%	46.2%	61.2%	15.9%	31.9%
Organized excursions	19.7%	34.5%	42.9%	21.0%	27.5%
Taxi, transfer, chauffeur service	62.2%	58.4%	25.4%	57.6%	54.4%
Theme Parks	5.1%	3.0%	5.3%	8.6%	5.3%
Sport activities	5.9%	8.6%	5.4%	7.6%	6.8%
Museums	6.1%	21.1%	22.5%	5.7%	12.3%
Flights between islands	4.5%	3.6%	13.8%	7.1%	6.4%

Activities in the Canary Islands 🚶

Outdoor time per day	UK	Germany	Spain	Ireland	Lanzarote
0 hours	2.3%	0.4%	0.8%	0.7%	1.7%
1 - 2 hours	15.6%	8.7%	5.4%	6.6%	11.2%
3 - 6 hours	40.3%	41.4%	21.2%	36.6%	36.2%
7 - 12 hours	36.8%	46.2%	59.7%	48.3%	44.5%
More than 12 hours	4.9%	3.3%	13.0%	7.8%	6.4%

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	UK	Germany	Spain	Ireland	Lanzarote
Walk, wander	81.9%	58.9%	74.9%	79.2%	76.9%
Beach	56.6%	80.3%	72.6%	64.9%	64.7%
Swimming pool, hotel facilities	71.2%	42.3%	52.6%	73.5%	63.5%
Explore the island on their own	37.2%	67.0%	71.6%	32.6%	48.7%
Taste Canarian gastronomy	26.8%	35.9%	41.0%	25.4%	28.0%
Museums / exhibitions	11.3%	33.4%	33.4%	8.7%	20.3%
Wineries / markets / popular festi	15.1%	31.0%	33.1%	11.0%	20.3%
Organized excursions	16.7%	21.2%	22.1%	14.6%	19.2%
Sport activities	12.2%	20.2%	11.8%	11.1%	14.4%
Nightlife / concerts / shows	16.5%	5.3%	8.9%	29.4%	13.6%
Activities at sea	9.0%	17.5%	8.4%	8.5%	9.9%
Nature activities	4.6%	16.4%	12.5%	4.3%	8.6%
Theme parks	8.8%	6.0%	7.0%	11.8%	8.6%
Sea excursions / whale watching	5.8%	7.3%	8.0%	6.9%	6.5%
Beauty and health treatments	5.4%	4.3%	5.6%	9.5%	5.6%
Astronomical observation	1.4%	4.6%	2.6%	1.0%	2.0%

* Multi-choise question



TOURIST PROFILE BY SOURCE MARKETS (2019)

LANZAROTE: MAIN SOURCE MARKETS



Which places do they visit in Lanzarote?



	UK	Germany	Spain	Ireland	Lanzarote
Montaña del Fuego	20.9%	48.5%	65.7%	19.7%	35.4%
Arrecife	21.1%	46.0%	54.8%	23.2%	31.2%
Jameos del agua	12.0%	42.8%	65.9%	13.2%	27.4%
Mirador del Río	9.8%	44.5%	57.6%	6.5%	25.3%
Mercadillo de Tegüise	14.2%	29.1%	36.5%	13.3%	21.3%
Cueva de los Verdes	7.1%	33.0%	59.0%	4.6%	20.9%
Jardín de Cactus	6.7%	32.0%	32.5%	4.9%	18.1%
Fundación César Manrique	7.2%	35.3%	25.4%	5.9%	15.9%
Monumento al Campesino	3.1%	16.8%	30.6%	2.2%	9.6%
Isla de La Graciosa	3.6%	12.0%	24.3%	2.7%	8.7%
Castillo de San José	1.7%	7.1%	11.5%	2.7%	4.5%

”

4 in 10 tourists in Lanzarote visit
Montaña del Fuego (Volcano Route)

Internet usage during their trip



	UK	Germany	Spain	Ireland	Lanzarote
Research					
- Tourist package	15.6%	18.5%	14.9%	16.9%	14.8%
- Flights	15.3%	16.3%	6.9%	14.6%	13.0%
- Accommodation	19.9%	23.7%	9.1%	15.7%	16.9%
- Transport	16.3%	15.2%	10.2%	17.5%	15.7%
- Restaurants	32.4%	22.3%	36.1%	35.4%	28.4%
- Excursions	22.5%	36.5%	34.9%	26.9%	26.2%
- Activities	29.2%	37.8%	35.4%	29.1%	30.1%
Book or purchase					
- Tourist package	43.3%	41.4%	24.1%	33.0%	39.4%
- Flights	71.7%	48.3%	77.3%	75.2%	66.7%
- Accommodation	61.8%	38.7%	68.1%	71.0%	57.3%
- Transport	51.8%	36.1%	64.1%	37.9%	47.6%
- Restaurants	11.1%	7.6%	13.8%	14.6%	12.1%
- Excursions	9.6%	10.9%	17.3%	13.1%	13.0%
- Activities	11.6%	9.1%	17.2%	16.0%	14.7%

* Multi-choice question

Internet usage in the Canary Islands	UK	Germany	Spain	Ireland	Lanzarote
Did not use the Internet	9.1%	6.6%	8.1%	5.7%	8.3%
Used the Internet	90.9%	93.4%	91.9%	94.3%	91.7%
- Own Internet connection	28.0%	32.6%	54.4%	33.1%	37.4%
- Free Wifi connection	52.3%	49.4%	24.0%	46.8%	39.5%
Applications*					
- Search for locations or maps	51.6%	68.7%	79.6%	52.6%	61.7%
- Search for destination info	44.9%	52.9%	48.0%	44.1%	44.8%
- Share pictures or trip videos	57.3%	56.5%	56.4%	52.1%	56.0%
- Download tourist apps	6.7%	10.2%	10.6%	6.7%	7.0%
- Others	29.6%	22.5%	13.9%	25.7%	22.6%

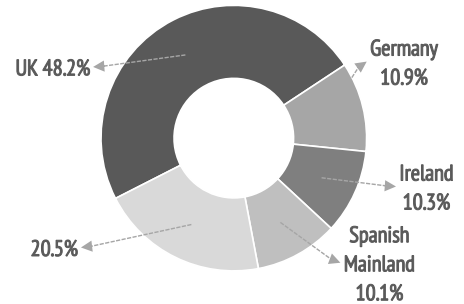
* Multi-choice question

How many islands do they visit during their trip?



	UK	Germany	Spain	Ireland	Lanzarote
One island	93.6%	92.8%	86.5%	92.4%	91.8%
Two islands	6.2%	6.3%	12.0%	7.3%	7.5%
Three or more islands	0.2%	0.9%	1.5%	0.3%	0.7%

SHARE OF TOURISTS BY SOURCE MARKET



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	UK	Germany	Spain	Ireland	Lanzarote
Average rating	8.98	8.72	8.72	8.87	8.85

Experience in the Canary Islands	UK	Germany	Spain	Ireland	Lanzarote
Worse or much worse than expected	1.7%	0.7%	2.7%	1.1%	1.8%
Lived up to expectations	56.3%	51.7%	52.6%	59.2%	55.4%
Better or much better than expected	41.9%	47.5%	44.7%	39.7%	42.9%

Future intentions (scale 1-10)	UK	Germany	Spain	Ireland	Lanzarote
Return to the Canary Islands	9.04	8.82	8.80	9.07	8.88
Recommend visiting the Canary Islands	9.18	9.06	9.08	9.19	9.09

How many are loyal to the Canary Islands?



	UK	Germany	Spain	Ireland	Lanzarote
Lanzarote: Repeat tourists	75.8%	68.5%	66.3%	81.2%	69.6%
Lanzarote: At least 10 previous visits	14.0%	8.1%	5.9%	16.6%	10.8%
Canary Islands: Repeat tourists	82.6%	75.5%	73.1%	85.6%	76.8%
Canary Islands: At least 10 previous visits	25.0%	19.5%	15.5%	23.6%	20.2%

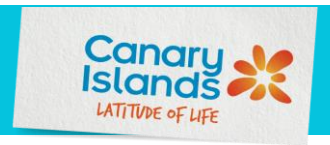
TOP 5: % REPEAT TOURISTS BY MARKETS

Ireland	81%
UK	76%
Nordics	73%
Germany	69%
Switzerland	67%



TOURIST PROFILE BY SOURCE MARKETS (2019)

LANZAROTE: MAIN SOURCE MARKETS



Where does the flight come from?



	UK	Germany	Spain	Ireland	Lanzarote
United Kingdom	99.1%	0.3%	0.2%	12.8%	49.5%
Spanish Mainland	0.1%	0.5%	99.3%	0.4%	12.5%
Germany	0.0%	95.1%	0.2%	0.4%	11.1%
Ireland	0.6%	0.0%	0.0%	86.1%	9.1%
France	0.0%	0.0%	0.0%	0.0%	3.5%
Netherlands	0.0%	0.9%	0.0%	0.0%	3.4%
Italy	0.0%	0.0%	0.0%	0.0%	2.1%
Belgium	0.0%	0.4%	0.1%	0.0%	1.9%
Switzerland	0.0%	1.7%	0.0%	0.0%	1.8%
Poland	0.0%	0.1%	0.0%	0.0%	1.1%
Denmark	0.0%	0.0%	0.0%	0.0%	1.0%
Sweden	0.0%	0.0%	0.0%	0.0%	0.9%
Norway	0.0%	0.1%	0.0%	0.2%	0.7%
Finland	0.0%	0.0%	0.0%	0.0%	0.5%
Others	0.0%	0.9%	0.2%	0.1%	1.1%

Who do they come with?



	UK	Germany	Spain	Ireland	Lanzarote
Unaccompanied	4.0%	7.6%	10.1%	4.7%	5.5%
Only with partner	50.6%	51.6%	44.4%	49.9%	49.5%
Only with children (< 13 years old)	3.8%	6.3%	6.9%	3.9%	4.9%
Partner + children (< 13 years old)	7.0%	7.4%	10.5%	7.0%	7.5%
Other relatives	14.0%	6.8%	7.6%	17.7%	11.9%
Friends	6.0%	4.2%	7.1%	5.0%	5.8%
Work colleagues	0.0%	0.0%	0.7%	0.0%	0.1%
Organized trip	0.2%	0.3%	0.0%	0.3%	0.2%
Other combinations (1)	14.4%	15.9%	12.8%	11.5%	14.7%

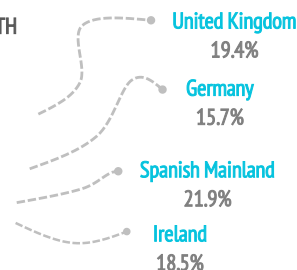
(1) Different situations have been isolated

Tourists with children	19.4%	15.7%	21.9%	18.5%	19.2%
- Between 0 and 2 years old	1.5%	2.1%	2.1%	1.2%	1.7%
- Between 3 and 12 years old	16.4%	12.2%	18.4%	16.3%	16.2%
- Between 0 -2 and 3-12 years old	1.5%	1.5%	1.4%	1.0%	1.4%
Tourists without children	80.6%	84.3%	78.1%	81.5%	80.8%
Group composition:					
- 1 person	6.6%	9.6%	12.7%	7.3%	8.1%
- 2 people	57.0%	61.0%	49.6%	56.7%	56.2%
- 3 people	11.7%	14.4%	14.9%	10.9%	12.5%
- 4 or 5 people	19.1%	13.7%	18.6%	21.6%	18.8%
- 6 or more people	5.6%	1.3%	4.1%	3.5%	4.5%
Average group size:	2.76	2.41	2.66	2.71	2.70

TOURIST TRAVELLING WITH CHILDREN



(Under the age of 13)
Lanzarote: 19.2%



Who are they?



	UK	Germany	Spain	Ireland	Lanzarote
Gender					
Men	43.6%	53.9%	48.7%	45.9%	47.2%
Women	56.4%	46.1%	51.3%	54.1%	52.8%
Age					
Average age (tourist > 15 years old)	51.7	49.7	43.9	49.3	49.5
Standard deviation	15.5	15.3	13.6	14.2	15.4
Age range (> 15 years old)					
16 - 24 years old	4.8%	4.8%	6.1%	5.4%	5.5%
25 - 30 years old	6.7%	9.4%	13.5%	5.8%	8.7%
31 - 45 years old	22.7%	23.5%	37.5%	27.5%	25.8%
46 - 60 years old	32.5%	36.4%	28.9%	36.9%	32.7%
Over 60 years old	33.2%	25.9%	14.0%	24.5%	27.3%
Occupation					
Salaried worker	53.0%	54.4%	58.3%	53.3%	53.4%
Self-employed	11.2%	11.5%	11.3%	13.9%	11.8%
Unemployed	0.5%	0.4%	2.1%	0.5%	0.7%
Business owner	4.6%	10.9%	10.6%	6.3%	7.4%
Student	2.0%	3.3%	4.5%	3.0%	2.9%
Retired	27.3%	17.4%	11.2%	19.7%	21.9%
Unpaid domestic work	0.7%	0.6%	1.1%	2.7%	1.0%
Others	0.7%	1.4%	1.1%	0.6%	0.8%
Annual household income level					
Less than €25,000	17.5%	9.7%	24.0%	8.9%	15.6%
€25,000 - €49,999	37.4%	34.6%	45.9%	34.4%	37.7%
€50,000 - €74,999	21.7%	29.2%	18.5%	29.3%	23.8%
More than €74,999	23.4%	26.4%	11.7%	27.4%	22.9%
Education level					
No studies	11.6%	0.3%	0.7%	3.6%	6.3%
Primary education	1.1%	3.4%	4.3%	0.7%	1.9%
Secondary education	19.3%	24.5%	22.4%	25.3%	21.5%
Higher education	68.0%	71.8%	72.6%	70.4%	70.3%

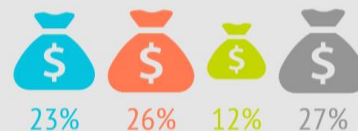


AVERAGE AGE (> 15 years old)

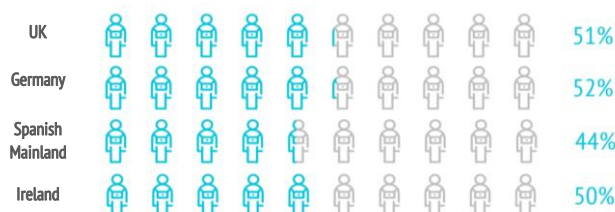


% OF TOURISTS WITH INCOMES OVER €74,999

UK Spanish Mainland
Germany Ireland



% OF TOURISTS TRAVELLING ONLY WITH PARTNER



Source: Encuesta sobre el Gasto Turístico (ISTAC).

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