

Tourist profile trend (2017)

LANZAROTE

How many are they and how much do they spend?



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR) (mill.)	2.13	2.27	2.39	2.73	2.93
Tourist arrivals (> 16 years old) (mill.)	1.82	1.91	2.03	2.33	2.49
Average daily expenditure (€)	118.53	123.58	128.47	131.08	134.14
. in their place of residence	82.82	87.64	93.82	95.37	97.97
. in the Canary Islands	35.71	35.94	34.65	35.71	36.17
Average length of stay	8.92	8.79	8.99	9.15	8.76
Turnover per tourist (€)	980	1,004	1,065	1,109	1,087
Total turnover (€m)	2,092	2,281	2,548	3,026	3,185
Tourist arrivals: year on year change	--	6.4%	5.3%	14.1%	7.3%
Turnover: year on year change	--	9.0%	11.7%	18.8%	5.2%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	15.1%	13.7%	11.6%	16.6%	14.4%
- Additional accommodation expenses	7.6%	6.9%	5.9%	6.3%	6.5%
Transport:					
- Public transport	17.0%	15.9%	17.3%	16.1%	15.7%
- Taxi	27.5%	27.5%	27.5%	27.2%	27.7%
- Car rental	27.9%	26.3%	27.0%	24.7%	25.5%
Food and drink:					
- Food purchases at supermarkets	70.1%	62.6%	58.2%	61.1%	60.3%
- Restaurants	63.6%	61.9%	62.6%	59.0%	63.4%
Souvenirs:	62.4%	63.3%	58.4%	55.3%	56.3%
Leisure:					
- Organized excursions	24.6%	25.6%	22.6%	24.1%	20.0%
- Leisure, amusement	8.5%	7.9%	7.0%	5.8%	6.2%
- Trip to other islands	4.1%	4.2%	3.7%	4.0%	3.6%
- Sporting activities	8.8%	7.4%	6.0%	6.0%	5.8%
- Cultural activities	10.9%	10.2%	10.1%	8.5%	8.8%
- Discos and disco-pubs	8.7%	8.0%	7.6%	3.9%	4.8%
Others:					
- Wellness	6.7%	6.0%	6.1%	5.5%	5.3%
- Medical expenses	5.7%	5.4%	4.5%	5.1%	4.9%
- Other expenses	11.6%	11.7%	11.2%	8.4%	10.0%

2017



+7%
TOURISTS
2,929,357



-2%
TRAVEL EXPENSES
€1,087



+5%
TURNOVER
€3,185 MILL

What do they book at their place of residence?



	2013	2014	2015	2016	2017
Flight only	7.0%	5.0%	4.2%	4.2%	5.0%
Flight and accommodation (room only)	32.3%	31.4%	30.7%	27.9%	31.1%
Flight and accommodation (B&B)	7.2%	7.9%	7.6%	7.7%	8.0%
Flight and accommodation (half board)	17.2%	17.2%	16.8%	18.7%	18.4%
Flight and accommodation (full board)	2.6%	2.7%	3.1%	3.6%	3.2%
Flight and accommodation (all inclusive)	33.8%	35.8%	37.7%	37.9%	34.4%
<u>% Tourists using low-cost airlines</u>	54.7%	55.1%	54.7%	52.5%	59.0%
<u>Other expenses in their place of residence:</u>					
- Car rental	11.1%	10.7%	10.2%	10.9%	11.2%
- Sporting activities	6.2%	5.2%	5.6%	5.3%	5.4%
- Excursions	4.2%	4.7%	4.4%	4.3%	4.3%
- Trip to other islands	0.8%	0.8%	0.7%	1.0%	0.8%

How do they book?



	2013	2014	2015	2016	2017
Accommodation booking					
Tour Operator	43.2%	46.9%	46.6%	44.5%	41.0%
- Tour Operator's website	81.3%	81.8%	78.7%	79.4%	80.3%
Accommodation	18.1%	17.0%	17.3%	18.2%	18.5%
- Accommodation's website	83.9%	84.3%	83.7%	85.6%	86.6%
Travel agency (High street)	18.0%	16.9%	18.0%	19.0%	18.4%
Online Travel Agency (OTA)	17.7%	17.5%	16.2%	15.7%	19.1%
No need to book accommodation	3.0%	1.7%	2.0%	2.5%	3.0%
Flight booking					
Tour Operator	45.9%	48.5%	48.6%	46.9%	42.8%
- Tour Operator's website	79.5%	79.9%	78.6%	77.7%	78.3%
Airline	27.1%	25.2%	25.7%	25.9%	29.4%
- Airline's website	97.0%	97.6%	96.9%	97.9%	98.3%
Travel agency (High street)	15.6%	15.5%	16.2%	17.8%	17.1%
Online Travel Agency (OTA)	11.4%	10.8%	9.6%	9.4%	10.7%

How far in advance do they book their trip?



	2013	2014	2015	2016	2017
The same day they leave	0.4%	0.3%	0.5%	0.5%	0.4%
Between 2 and 7 days	7.9%	6.7%	6.0%	5.0%	5.1%
Between 8 and 15 days	9.4%	8.8%	8.2%	6.2%	6.0%
Between 16 and 30 days	17.7%	16.2%	14.2%	13.1%	11.9%
Between 31 and 90 days	35.2%	35.0%	35.0%	35.7%	36.3%
More than 90 days	29.4%	32.9%	36.1%	39.5%	40.4%

Who are they?



	2013	2014	2015	2016	2017
Gender					
Men	61.3%	57.9%	50.7%	45.7%	47.6%
Women	38.7%	42.1%	49.3%	54.3%	52.4%
Age					
Average age (tourists > 16 years old)	43.1	45.2	46.6	51.0	49.7
Standard deviation	13.9	14.3	14.3	15.1	15.1
Age range (> 16 years old)					
16-24 years old	9.2%	7.0%	6.2%	4.5%	5.3%
25-30 years old	13.2%	12.1%	9.8%	7.4%	7.5%
31-45 years old	35.2%	32.1%	31.9%	24.1%	27.2%
46-60 years old	29.8%	32.7%	33.0%	33.5%	33.1%
Over 60 years old	12.6%	16.2%	19.2%	30.5%	26.9%
Occupation					
Business owner or self-employed	25.6%	25.5%	25.2%	21.7%	24.8%
Upper/Middle management employee	37.4%	36.4%	35.1%	31.4%	32.7%
Auxiliary level employee	18.4%	16.9%	15.7%	13.8%	13.2%
Students	4.9%	3.9%	3.6%	2.9%	3.0%
Retired	11.4%	15.0%	18.2%	28.5%	24.3%
Unemployed / unpaid dom. work	2.4%	2.3%	2.1%	1.7%	1.9%
Annual household income level					
€12,000 - €24,000	16.6%	16.7%	15.5%	15.3%	15.2%
€24,001 - €36,000	19.9%	20.3%	17.9%	19.7%	18.9%
€36,001 - €48,000	17.4%	16.9%	17.4%	17.7%	17.1%
€48,001 - €60,000	16.2%	15.6%	14.9%	15.7%	15.9%
€60,001 - €72,000	8.9%	9.1%	11.1%	9.8%	9.5%
€72,001 - €84,000	6.8%	6.5%	6.6%	6.1%	6.6%
More than €84,000	14.1%	14.9%	16.6%	15.8%	16.8%

Tourist profile trend (2017)

LANZAROTE

Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	1,820,148	1,911,659	2,033,971	2,328,674	2,488,213
- Fuerteventura	1,514,524	1,595,143	1,668,484	1,914,107	1,938,908
- Gran Canaria	2,876,750	3,001,310	3,104,724	3,654,806	3,900,824
- Tenerife	3,996,638	4,193,228	4,249,936	4,885,901	5,144,415
- La Palma	143,472	138,916	163,425	221,541	277,952

Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	7.7%	7.7%	6.9%	6.3%	6.4%
4* Hotel	34.4%	36.4%	37.1%	41.2%	37.9%
1-2-3* Hotel	12.2%	13.8%	14.3%	10.2%	11.8%
Apartment	42.9%	40.5%	40.0%	40.5%	41.6%
Property (privately-owned, friends, family)	2.2%	1.3%	1.4%	1.3%	1.4%
Others	0.6%	0.3%	0.4%	0.6%	0.9%

Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	6.1%	4.4%	4.8%	3.7%	4.5%
Only with partner	57.7%	54.3%	52.2%	53.7%	50.0%
Only with children (under the age of 13)	1.1%	1.4%	1.3%	1.1%	1.2%
Partner + children (under the age of 13)	12.0%	12.5%	15.0%	13.1%	14.1%
Other relatives	4.8%	5.2%	5.7%	6.5%	6.2%
Friends	5.0%	5.2%	5.2%	4.5%	4.6%
Work colleagues	0.2%	0.3%	0.2%	0.2%	0.1%
Other combinations ⁽¹⁾	13.0%	16.8%	15.7%	17.2%	19.3%

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

How do they rate the Canary Islands?

	2013	2014	2015	2016	2017
Impression of their stay					
Good or very good (% tourists)	95.6%	96.4%	95.5%	95.8%	95.2%
Average rating (scale 1-10)	8.99	9.04	9.01	9.08	9.06

How many are loyal to the Canary Islands?

Repeat tourists (previous visits)	2013	2014	2015	2016	2017
At least 1 visit to the island	50.8%	49.9%	51.8%	55.1%	55.0%
At least 10 visits to the island	5.0%	4.9%	5.5%	6.7%	7.1%
At least 1 visit to the Canary Islands	80.7%	79.3%	79.4%	82.4%	81.4%
At least 10 visits to the Canary Islands	13.7%	14.6%	16.4%	18.1%	17.5%

Where are they from?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
United Kingdom	45.6%	46.5%	48.0%	48.1%	48.9%
Germany	13.0%	13.2%	12.2%	12.8%	12.3%
Ireland	9.5%	9.0%	9.3%	8.7%	8.7%
Spanish Mainland	12.7%	10.8%	9.4%	9.4%	7.9%
France	3.4%	4.0%	5.7%	5.5%	4.8%
Netherlands	3.2%	3.1%	3.3%	3.7%	3.8%
Italy	1.4%	1.4%	1.5%	2.1%	2.7%
Poland	0.4%	1.2%	1.2%	0.6%	1.8%
Belgium	1.3%	1.3%	1.6%	1.5%	1.7%
Others	9.5%	9.5%	7.8%	7.6%	7.4%

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	17.6%	17.6%	18.1%	17.9%	18.1%
- Fuerteventura	14.6%	14.7%	14.9%	14.7%	14.1%
- Gran Canaria	27.8%	27.7%	27.7%	28.1%	28.4%
- Tenerife	38.6%	38.7%	37.9%	37.6%	37.4%
- La Palma	1.4%	1.3%	1.5%	1.7%	2.0%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	93.0%	92.7%	92.7%	92.6%	93.0%
Tranquillity/rest/relaxation	44.8%	43.6%	39.8%	38.8%	41.4%
Beaches	26.5%	28.5%	26.1%	25.4%	26.8%
Scenery	23.7%	23.8%	24.2%	24.3%	24.9%
Visiting new places	16.6%	17.3%	16.0%	16.2%	16.4%
Price	19.3%	19.2%	18.6%	15.8%	15.1%
Ease of travel	12.8%	12.6%	13.2%	13.9%	13.4%
Security	5.5%	5.3%	9.0%	12.2%	10.0%
Suitable destination for children	8.0%	9.2%	10.0%	9.9%	10.0%
Quality of the environment	9.5%	9.1%	9.2%	10.0%	9.9%
Active tourism	4.3%	4.2%	4.1%	3.6%	4.2%
Culture	4.5%	4.1%	4.6%	4.4%	4.2%
Nightlife/fun	3.3%	3.1%	2.5%	2.1%	2.4%
Shopping	1.8%	2.1%	2.1%	2.1%	2.0%
Nautical activities	2.0%	1.8%	1.7%	1.7%	1.5%
Rural tourism	1.1%	1.2%	0.9%	1.2%	1.3%

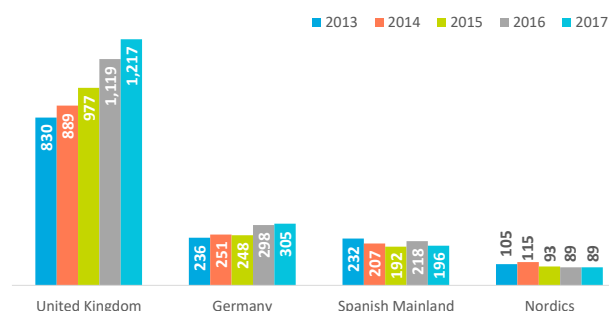
* Multi-choice question

What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	69.2%	68.2%	67.8%	70.6%	70.8%
Recommendation by friends/relatives	39.2%	38.0%	36.5%	35.4%	36.3%
The Canary Islands television channel	0.2%	0.2%	0.3%	0.2%	0.1%
Other television or radio channels	0.5%	0.5%	0.5%	0.8%	0.8%
Information in press/magazines/books	4.3%	4.5%	4.0%	4.0%	4.0%
Attendance at a tourism fair	0.3%	0.2%	0.3%	0.3%	0.3%
Tour Operator's brochure or catalogue	8.7%	10.1%	9.7%	10.4%	8.1%
Recommendation by Travel Agency	8.8%	9.0%	9.9%	8.9%	8.6%
Information obtained via the Internet	32.3%	33.5%	30.0%	26.9%	28.5%
Senior Tourism programme	0.5%	0.4%	0.2%	0.1%	0.1%
Others	5.4%	4.3%	4.9%	4.9%	4.4%

* Multi-choice question

Main markets: tourist arrivals (thousands)



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.