

Tourist profile trend (2016)

Lanzarote: Third Quarter



How many are they and how much do they spend?



How do they book?

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	465,423	491,243	508,699	544,296	604,857
Average daily expenditure (€)	120.93	117.49	124.12	135.00	133.41
.in their place of residence	86.79	82.64	89.95	102.52	96.99
.in the Canary Islands	34.14	34.85	34.18	32.48	36.42
Average lenght of stay	9.47	9.72	9.14	9.33	9.38
Turnover per tourist (€)	1,076	1,060	1,066	1,174	1,155
Total turnover (> 16 years old) (€m)	501	521	542	639	699
Share of total turnover	29.6%	29.2%	28.2%	29.5%	27.1%
Share of total tourist	26.7%	27.0%	26.6%	26.8%	26.0%
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	29.34	41.97	28.45	31.26	50.99
- Accommodation	25.04	37.34	23.26	26.25	44.13
- Additional accommodation expenses	4.30	4.63	5.19	5.01	6.86
Transport:	30.94	30.03	24.24	28.92	28.51
- Public transport	2.60	4.84	2.40	4.27	4.53
- Taxi	5.97	7.60	7.47	7.23	6.95
- Car rental	22.37	17.59	14.36	17.42	17.04
Food and drink:	145.86	149.23	139.02	128.45	146.41
- Food purchases at supermarkets	57.91	65.19	50.91	45.19	55.81
- Restaurants	87.95	84.04	88.11	83.26	90.60
Souvenirs:	41.18	43.07	50.31	44.46	40.30
Leisure:	49.86	45.07	43.82	41.14	41.03
- Organized excursions	23.25	20.73	21.97	19.94	20.57
- Leisure, amusement	3.77	4.78	4.25	4.48	3.66
- Trip to other islands	2.66	3.17	1.78	1.61	2.77
- Sporting activities	4.06	4.86	4.57	2.67	4.96
- Cultural activities	3.89	3.96	4.17	4.49	4.69
- Discos and disco-pubs	12.23	7.57	7.07	7.94	4.38
Others:	10.86	15.40	10.35	12.78	10.31
- Wellness	2.50	2.27	2.18	3.05	3.34
- Medical expenses	1.06	1.61	1.43	0.85	1.05
- Other expenses	7.30	11.51	6.74	8.88	5.93

How far in advance do they book their trip?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.3%	0.1%	0.4%	0.4%	0.4%
Between 2 and 7 days	7.1%	6.9%	7.5%	4.7%	4.2%
Between 8 and 15 days	8.6%	9.9%	8.8%	8.3%	5.6%
Between 16 and 30 days	16.1%	14.7%	15.4%	12.9%	10.9%
Between 31 and 90 days	29.5%	32.6%	30.3%	31.1%	31.2%
More than 90 days	38.5%	35.7%	37.6%	42.6%	47.8%

What do they book at their place of residence?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	5.8%	6.0%	4.1%	3.3%	3.8%
Flight and accommodation (room only)	31.2%	31.8%	29.1%	26.5%	28.8%
Flight and accommodation (B&B)	5.4%	6.6%	5.9%	6.5%	6.5%
Flight and accommodation (half board)	16.8%	16.4%	16.3%	14.4%	17.4%
Flight and accommodation (full board)	2.3%	2.7%	2.8%	3.3%	3.5%
Flight and accommodation (all inclusive)	38.5%	36.5%	41.9%	46.1%	40.0%
% Tourists using low-cost airlines	44.9%	58.1%	56.5%	53.4%	54.9%
Other expenses in their place of residence:					
- Car rental	9.7%	11.8%	11.1%	8.4%	11.8%
- Sporting activities	4.4%	6.0%	5.9%	6.3%	6.3%
- Excursions	3.0%	5.4%	5.6%	5.0%	4.9%
- Trip to other islands	0.7%	1.2%	1.4%	0.6%	1.3%

(*) 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.

How do they book?

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Accommodation booking					
Tour Operator	40.7%	40.6%	44.4%	46.5%	42.9%
- Tour Operator's website	74.8%	79.8%	80.0%	79.3%	80.5%
Accommodation	16.5%	17.5%	14.5%	16.4%	18.4%
- Accommodation's website	81.8%	83.3%	79.7%	84.1%	87.3%
Travel agency (High street)	25.5%	20.7%	21.3%	19.9%	20.7%
Online Travel Agency (OTA)	14.4%	18.7%	18.1%	15.5%	15.6%
No need to book accommodation	2.9%	2.4%	1.7%	1.7%	2.4%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight booking					
Tour Operator	43.7%	43.4%	46.1%	48.3%	44.9%
- Tour Operator's website	73.5%	79.4%	77.5%	77.7%	79.4%
Airline	23.4%	28.6%	23.5%	23.5%	27.6%
- Airline's website	97.4%	97.3%	97.4%	96.7%	98.3%
Travel agency (High street)	23.1%	17.5%	18.7%	17.7%	18.5%
Online Travel Agency (OTA)	9.7%	10.4%	11.7%	10.5%	9.0%

Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	5.8%	7.3%	8.1%	7.3%	7.4%
4* Hotel	36.7%	34.5%	35.6%	39.1%	38.6%
1-2-3* Hotel	13.6%	12.2%	13.5%	15.5%	9.3%
Apartment	41.1%	43.8%	41.3%	36.4%	42.7%
Property (privately-owned, friends, family)	2.4%	1.9%	1.3%	1.5%	1.3%
Others	0.4%	0.2%	0.2%	0.2%	0.7%

Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Gender					
Percentage of men	56.7%	64.7%	52.1%	49.5%	43.9%
Percentage of women	43.3%	35.3%	47.9%	50.5%	56.1%
Age					
Average age (tourists > 16 years old)	39.9	38.4	40.5	42.0	46.2
Standard deviation	12.0	12.5	12.5	12.3	14.6
Age range (> 16 years old)					
16-24 years old	11.0%	15.3%	11.4%	8.6%	7.4%
25-30 years old	16.0%	17.9%	15.4%	12.2%	11.1%
31-45 years old	39.4%	34.5%	38.7%	41.0%	28.9%
46-60 years old	29.0%	28.3%	28.7%	31.1%	35.2%
Over 60 years old	4.6%	4.0%	5.8%	7.1%	17.4%
Occupation					
Business owner or self-employed	25.0%	25.3%	25.2%	26.6%	23.2%
Upper/Middle management employee	39.8%	37.5%	39.3%	41.0%	35.0%
Auxiliary level employee	22.6%	20.9%	21.1%	19.1%	18.5%
Students	5.2%	8.7%	6.1%	4.3%	4.7%
Retired	4.5%	3.8%	5.1%	6.5%	16.6%
Unemployed / unpaid dom. work	2.8%	3.7%	3.1%	2.6%	1.9%
Annual household income level					
€12,000 - €24,000	18.4%	17.7%	18.9%	14.9%	16.7%
€24,001 - €36,000	20.6%	22.0%	24.9%	16.9%	19.4%
€36,001 - €48,000	19.3%	17.4%	15.9%	16.3%	16.0%
€48,001 - €60,000	14.6%	18.0%	14.3%	14.9%	16.1%
€60,001 - €72,000	10.0%	9.2%	8.9%	12.5%	11.3%
€72,001 - €84,000	5.7%	5.3%	4.6%	7.1%	5.3%
More than €84,000	11.4%	10.3%	12.5%	17.4%	15.2%

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Which island do they choose?

Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	465,423	491,243	508,699	544,296	604,857
- Fuerteventura	385,948	411,931	440,855	447,593	484,107
- Gran Canaria	592,788	625,351	656,504	675,982	847,744
- Tenerife	931,210	933,438	997,622	987,323	1,184,832
- La Palma	39,502	33,517	35,685	38,837	46,789

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	19.3%	19.7%	19.3%	20.2%	19.1%
- Fuerteventura	16.0%	16.5%	16.7%	16.6%	15.3%
- Gran Canaria	24.5%	25.1%	24.9%	25.1%	26.8%
- Tenerife	38.6%	37.4%	37.8%	36.6%	37.4%
- La Palma	1.6%	1.3%	1.4%	1.4%	1.5%

Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	2.9%	4.5%	2.5%	3.3%	3.0%
Only with partner	47.2%	51.3%	44.2%	39.2%	42.3%
Only with children (under the age of 13)	1.1%	1.1%	2.3%	1.5%	2.0%
Partner + children (under the age of 13)	18.9%	16.9%	17.5%	24.4%	18.9%
Other relatives	5.2%	4.5%	6.5%	5.8%	6.8%
Friends	3.3%	4.6%	4.8%	3.6%	4.5%
Work colleagues	0.1%	0.0%	0.3%	0.1%	0.0%
Other combinations ⁽¹⁾	21.2%	17.1%	22.0%	22.1%	22.5%

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

How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	95.7%	95.2%	96.3%	96.2%	97.2%
Average rating (scale 1-10)	9.01	8.98	9.03	9.08	9.14

How many are loyal to the destination?

Repeat tourists of the island	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	42.8%	47.0%	43.6%	47.3%	50.9%
In love (at least 10 previous visits)	3.2%	4.1%	3.6%	4.1%	4.1%

Where are they from?



Ten main source markets	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
United Kingdom	203,633	222,476	234,088	269,333	297,765
Spanish Mainland	88,110	85,322	86,002	75,022	77,779
Germany	54,581	51,912	57,804	53,320	63,320
Ireland	45,649	51,712	51,196	50,449	54,585
France	14,248	17,683	18,718	33,565	33,723
Netherlands	15,835	16,389	13,759	16,440	20,812
Italy	10,379	9,951	8,975	9,113	16,136
Belgium	5,676	6,335	7,336	8,594	9,252
Austria	1,553	8,706	2,406	3,339	7,772
Switzerland	5,797	5,727	6,505	6,973	7,743

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	88.4%	89.0%	88.8%	89.3%	88.5%
Tranquillity/rest/relaxation	42.0%	42.5%	39.8%	37.0%	36.3%
Beaches	34.6%	33.9%	35.2%	32.2%	31.2%
Scenery	20.1%	22.3%	24.5%	25.2%	23.8%
Visiting new places	21.7%	19.7%	21.6%	18.4%	18.4%
Price	22.5%	20.3%	19.4%	17.7%	16.2%
Suitable destination for children	11.3%	11.6%	14.8%	16.8%	13.9%
Ease of travel	9.2%	8.6%	9.2%	8.4%	12.8%
Security	4.1%	3.8%	3.9%	9.5%	12.1%
Suitable destination for children	6.7%	8.5%	9.1%	9.3%	9.5%
Culture	5.0%	4.2%	4.2%	4.5%	4.1%
Nautical activities	1.6%	2.5%	1.6%	2.2%	2.5%
Active tourism	1.9%	4.7%	2.7%	3.0%	2.0%
Nightlife/fun	4.7%	4.5%	3.5%	2.9%	1.6%
Rural tourism	1.1%	1.6%	1.1%	0.5%	1.5%
Shopping	2.5%	1.3%	2.3%	1.6%	1.3%

* Multi-choice question

What did motivate them to come?

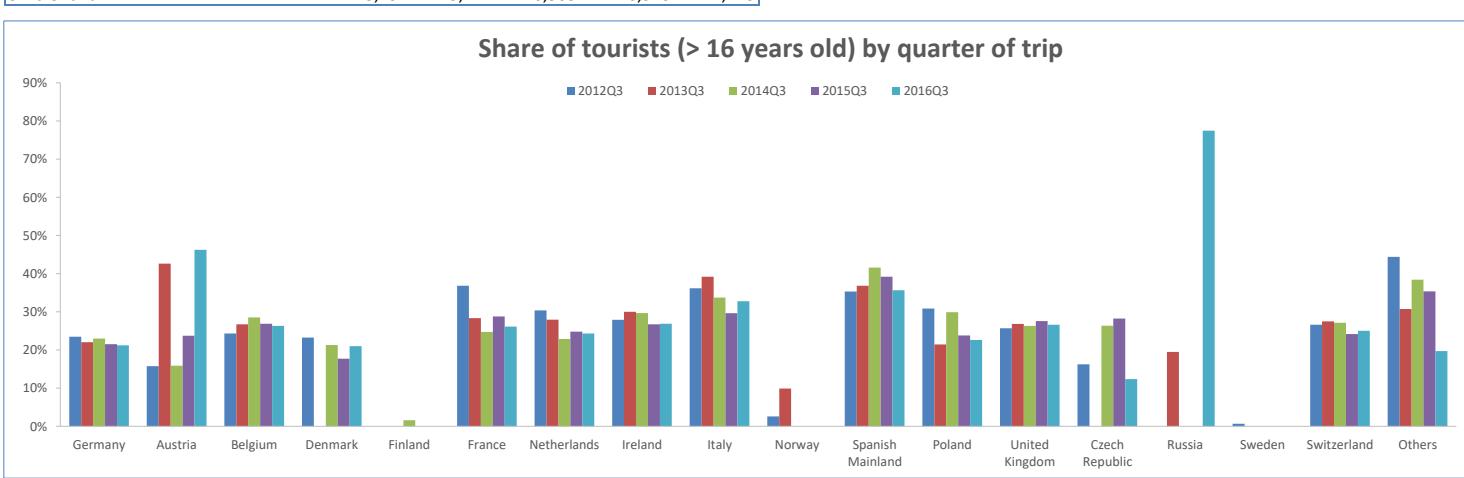


Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	60.5%	63.8%	59.4%	60.3%	63.3%
Recommendation by friends or relatives	39.8%	41.8%	44.9%	37.5%	41.0%
The Canary Islands television channel	0.1%	0.3%	0.4%	0.2%	0.1%
Other television or radio channels	0.6%	0.7%	0.5%	0.7%	1.2%
Information in the press/magazines/books	4.3%	4.1%	3.7%	3.5%	3.6%
Attendance at a tourism fair	0.0%	0.8%	0.1%	0.3%	0.2%
Tour Operator's brochure or catalogue	12.4%	10.7%	11.8%	12.7%	10.9%
Recommendation by Travel Agency	11.7%	11.6%	12.1%	10.9%	10.9%
Information obtained via the Internet	30.7%	32.7%	34.9%	31.6%	27.2%
Senior Tourism programme	0.0%	0.1%	0.1%	0.1%	0.1%
Others	3.4%	5.6%	3.3%	4.4%	4.1%

* Multi-choice question

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

■ 2012Q3 ■ 2013Q3 ■ 2014Q3 ■ 2015Q3 ■ 2016Q3



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.