

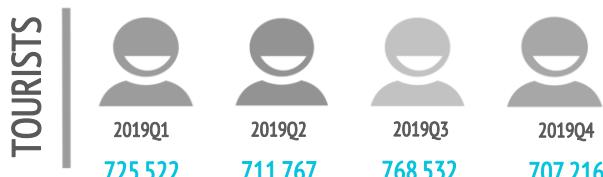
TOURIST PROFILE BY QUARTER OF TRIP (2019) LANZAROTE



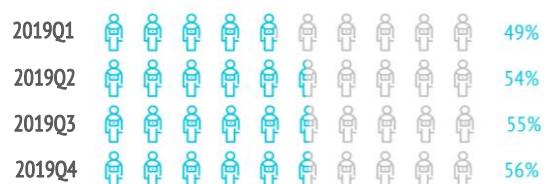
How many are they and how much do they spend?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
TOURISTS					
Tourist arrivals (FRONTUR) (*)	0.73	0.71	0.77	0.71	2.91
Tourist arrivals > 15 years old (EGT) (*)	0.63	0.61	0.63	0.65	2.52
- book holiday package (*)	0.31	0.33	0.34	0.36	1.35
- do not book holiday package (*)	0.32	0.28	0.29	0.28	1.17
- % tourists who book holiday package	49.2%	54.4%	54.6%	56.2%	53.6%

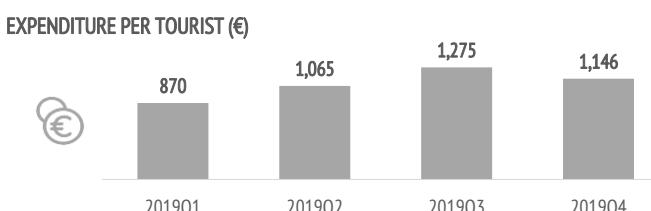
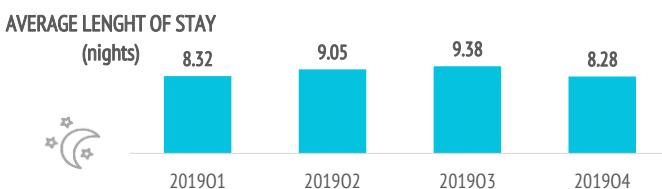
(*) Million of tourists



% TOURISTS WHO BOOK HOLIDAY PACKAGE



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Expenditure per tourist (€)	870	1,065	1,275	1,146	1,089
- book holiday package	995	1,164	1,378	1,239	1,200
- holiday package	783	962	1,144	1,016	982
- others	212	202	234	223	218
- do not book holiday package	749	946	1,151	1,028	962
- flight	164	266	324	290	258
- accommodation	291	319	412	375	348
- others	294	362	416	362	356
Average length of stay	8.32	9.05	9.38	8.28	8.75
- book holiday package	8.28	8.54	8.66	7.97	8.36
- do not book holiday package	8.36	9.65	10.24	8.68	9.21
Average daily expenditure (€)	113.9	131.8	148.1	147.0	135.3
- book holiday package	126.5	145.1	166.8	161.0	150.6
- do not book holiday package	101.7	116.0	125.7	129.0	117.6
Total turnover (> 15 years old) (€m)	550	651	802	744	2,747
- book holiday package	310	387	473	452	1,622
- do not book holiday package	240	264	329	292	1,125



Importance of each factor in the destination choice

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Climate	82.9%	73.9%	70.1%	83.1%	77.5%
Safety	50.9%	60.4%	55.4%	56.1%	55.7%
Tranquility	46.1%	53.1%	49.1%	50.8%	49.8%
Accommodation supply	43.2%	49.5%	49.8%	47.9%	47.6%
Price	41.1%	45.0%	39.6%	39.3%	41.2%
Sea	36.4%	37.7%	41.0%	42.2%	39.4%
Effortless trip	33.9%	40.6%	35.1%	40.2%	37.5%
Environment	32.9%	37.7%	36.1%	36.5%	35.8%
European belonging	35.4%	37.2%	30.8%	34.9%	34.5%
Landscapes	32.7%	32.8%	31.6%	31.1%	32.0%
Beaches	28.6%	32.8%	35.5%	30.9%	32.0%
Gastronomy	21.1%	23.5%	25.3%	25.9%	24.0%
Authenticity	21.1%	26.8%	24.7%	20.9%	23.3%
Fun possibilities	14.7%	19.1%	23.1%	14.6%	17.9%
Exoticism	9.5%	10.8%	11.1%	8.9%	10.1%
Historical heritage	8.1%	10.4%	10.4%	8.1%	9.2%
Culture	9.0%	10.3%	9.6%	7.8%	9.2%
Shopping	4.9%	8.8%	9.0%	8.0%	7.7%
Hiking trail network	8.8%	5.7%	4.1%	8.0%	6.7%
Nightlife	4.1%	7.2%	6.1%	4.5%	5.5%

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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Rest	56.5%	53.4%	53.5%	61.6%	56.3%
Enjoy family time	9.5%	15.5%	17.0%	10.8%	13.2%
Have fun	4.8%	8.4%	5.6%	4.8%	5.9%
Explore the destination	23.8%	19.2%	21.0%	19.3%	20.8%
Practice their hobbies	3.3%	2.2%	1.8%	2.0%	2.3%
Other reasons	2.2%	1.4%	1.0%	1.4%	1.5%

How far in advance do they book their trip?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
The same day	0.7%	0.3%	0.3%	0.2%	0.4%
Between 1 and 30 days	28.8%	17.7%	16.9%	18.8%	20.6%
Between 1 and 2 months	29.6%	20.0%	19.6%	21.6%	22.8%
Between 3 and 6 months	26.9%	38.9%	34.8%	36.0%	34.1%
More than 6 months	14.0%	23.1%	28.3%	23.3%	22.2%

% TOURISTS BOOKING MORE THAN 6 MONTHS IN ADVANCE



Picture: Freepik.com

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 QUARTER OF TRIP (2019) LANZAROTE



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

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Previous visits to the Canary Islands	56.4%	59.5%	56.3%	61.3%	58.4%
Friends or relatives	28.2%	28.2%	28.9%	23.8%	27.2%
Internet or social media	65.6%	57.1%	61.4%	61.0%	61.3%
Mass Media	1.8%	1.3%	1.5%	1.3%	1.5%
Travel guides and magazines	9.9%	11.0%	9.3%	10.7%	10.2%
Travel Blogs or Forums	7.7%	5.2%	8.3%	6.1%	6.8%
Travel TV Channels	0.8%	0.9%	0.5%	0.6%	0.7%
Tour Operator or Travel Agency	19.2%	24.6%	23.9%	24.7%	23.1%
Public administrations or similar	0.4%	0.7%	0.2%	0.2%	0.4%
Others	1.8%	2.2%	2.5%	2.1%	2.1%

* Multi-choice question

Other expenses

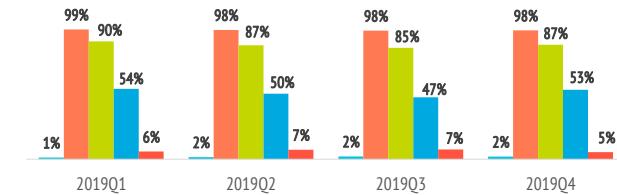
	2019Q1	2019Q2	2019Q3	2019Q4	2019
Restaurants or cafes	63.4%	55.6%	65.2%	66.3%	62.7%
Supermarkets	58.6%	51.5%	59.4%	55.0%	56.1%
Car rental	34.4%	27.3%	33.7%	32.2%	31.9%
Organized excursions	23.2%	30.9%	31.3%	24.6%	27.5%
Taxi, transfer, chauffeur service	51.1%	56.0%	54.2%	56.1%	54.4%
Theme Parks	4.1%	3.8%	8.7%	4.5%	5.3%
Sport activities	7.8%	6.2%	7.8%	5.2%	6.8%
Museums	13.1%	9.8%	12.6%	13.4%	12.3%
Flights between islands	6.9%	6.6%	7.3%	4.6%	6.4%

Activities in the Canary Islands

	2019Q1	2019Q2	2019Q3	2019Q4	2019
0 hours	1.2%	1.6%	2.1%	1.9%	1.7%
1 - 2 hours	9.0%	11.7%	13.1%	10.9%	11.2%
3 - 6 hours	36.1%	36.9%	37.7%	34.3%	36.2%
7 - 12 hours	47.8%	42.7%	39.6%	47.6%	44.5%
More than 12 hours	5.8%	7.2%	7.4%	5.3%	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



Where do they stay? 🏨

	2019Q1	2019Q2	2019Q3	2019Q4	2019
1-2-3* Hotel	8.1%	4.3%	6.2%	6.4%	6.3%
4* Hotel	35.9%	42.3%	38.7%	40.0%	39.2%
5* Hotel / 5* Luxury Hotel	10.5%	9.6%	9.7%	8.5%	9.6%
Aparthotel / Tourist Villa	28.6%	25.6%	27.5%	27.5%	27.3%
House/room rented in a private dwelling	6.8%	5.5%	5.4%	7.4%	6.3%
Private accommodation ⁽¹⁾	5.4%	5.7%	5.4%	4.4%	5.2%
Others (Cottage, cruise, camping,..)	4.8%	6.9%	7.0%	5.8%	6.1%

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

What do they book? 🎪

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Room only	32.0%	25.9%	28.1%	30.3%	29.1%
Bed and Breakfast	11.9%	9.9%	9.4%	12.3%	10.9%
Half board	17.9%	19.2%	19.8%	20.7%	19.4%
Full board	2.5%	5.3%	2.6%	2.0%	3.1%
All inclusive	35.7%	39.8%	40.2%	34.7%	37.5%

“

37.5% of tourists book all inclusive.



35.7%

2019Q1



40.2%

2019Q3



39.8%

2019Q2



34.7%

2019Q4

Taste Canarian gastronomy
Swimming pool
Walk
Explore the island
Activities at sea
Nightlife
Wineries/markets
Astronomical observation
Museums
Sport activities
Beach
Explore the island
Theme parks
Nature activities
Sea excursions
Beauty and health treatments

* Multi-choice question

TOURIST PROFILE BY QUARTER OF TRIP (2019)

LANZAROTE



Which places do they visit in Lanzarote?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Montaña del Fuego	35.8%	34.3%	37.5%	34.2%	35.4%
Arrecife	37.0%	28.2%	29.8%	29.6%	31.2%
Jameos del agua	27.6%	24.9%	30.3%	26.9%	27.4%
Mirador del Río	28.5%	22.1%	26.5%	24.2%	25.3%
Mercadillo de Teguise	23.3%	19.4%	22.9%	19.8%	21.3%
Cueva de los Verdes	20.8%	19.9%	22.9%	20.2%	20.9%
Jardín de Cactus	20.8%	16.7%	17.7%	17.0%	18.1%
Fundación César Manrique	18.2%	16.0%	14.3%	15.2%	15.9%
Monumento al Campesino	10.6%	8.9%	9.9%	9.0%	9.6%
Isla de La Graciosa	7.6%	9.2%	10.7%	7.3%	8.7%
Castillo de San José	5.1%	3.4%	5.2%	4.4%	4.5%

4 in 10 tourists in Lanzarote visit

Montaña del Fuego (Ruta de los Volcanes)



2019Q1		35.8%
2019Q2		34.3%
2019Q3		37.5%
2019Q4		34.2%

Internet usage during their trip



	2019Q1	2019Q2	2019Q3	2019Q4	2019
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Research

- Tourist package	15.9%	16.2%	15.3%	14.8%	15.5%
- Flights	13.0%	14.0%	12.0%	14.5%	13.4%
- Accommodation	16.2%	18.0%	15.8%	19.7%	17.4%
- Transport	15.8%	16.2%	13.7%	14.4%	15.0%
- Restaurants	32.9%	30.7%	29.6%	29.9%	30.8%
- Excursions	29.0%	25.1%	28.7%	24.5%	26.9%
- Activities	33.5%	29.9%	33.3%	30.4%	31.8%

Book or purchase

- Tourist package	38.1%	37.8%	36.2%	42.2%	38.6%
- Flights	73.4%	67.9%	68.9%	69.7%	70.0%
- Accommodation	65.5%	59.2%	60.8%	61.1%	61.7%
- Transport	54.4%	50.3%	49.9%	51.4%	51.6%
- Restaurants	10.7%	12.3%	9.4%	14.5%	11.7%
- Excursions	9.1%	14.8%	12.0%	12.3%	12.0%
- Activities	11.2%	13.7%	13.7%	13.0%	12.9%

* Multi-choice question

Internet usage in the Canary Islands



	2019Q1	2019Q2	2019Q3	2019Q4	2019
Did not use the Internet	6.7%	9.9%	6.4%	7.2%	7.5%
Used the Internet	93.3%	90.1%	93.6%	92.8%	92.5%
- Own Internet connection	35.3%	32.7%	34.5%	34.0%	34.1%
- Free Wifi connection	47.1%	45.7%	46.5%	46.7%	46.5%
Applications*					
- Search for locations or maps	65.2%	55.7%	61.6%	61.0%	61.0%
- Search for destination info	49.9%	42.7%	46.7%	47.8%	46.9%
- Share pictures or trip videos	57.2%	55.8%	61.1%	56.3%	57.6%
- Download tourist apps	7.8%	8.5%	8.4%	8.7%	8.3%
- Others	24.7%	28.6%	22.6%	22.2%	24.5%

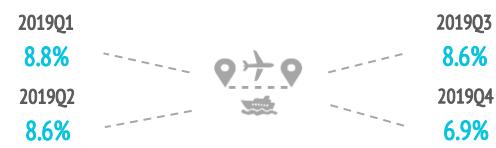
* Multi-choice question

How many islands do they visit during their trip?



	2019Q1	2019Q2	2019Q3	2019Q4	2019
One island					91.8%
Two islands					7.5%
Three or more islands					0.7%

% TOURISTS VISITING MORE THAN ONE ISLAND



How do they rate the Canary Islands?



Satisfaction (scale 0-10)	2019Q1	2019Q1	2019Q1	2019Q1	2019Q1
Average rating	8.88	8.87	8.80	8.84	8.85

Experience in the Canary Islands	2019Q1	2019Q1	2019Q1	2019Q1	2019Q1
Worse or much worse than expected	1.9%	1.8%	1.7%	1.6%	1.8%
Lived up to expectations	51.6%	57.1%	55.5%	57.2%	55.4%
Better or much better than expected	46.5%	41.0%	42.8%	41.2%	42.9%

Future intentions (scale 1-10)	2019Q1	2019Q1	2019Q1	2019Q1	2019Q1
Return to the Canary Islands	9.02	8.88	8.66	8.95	8.88
Recommend visiting the Canary Islands	9.19	9.08	8.98	9.11	9.09

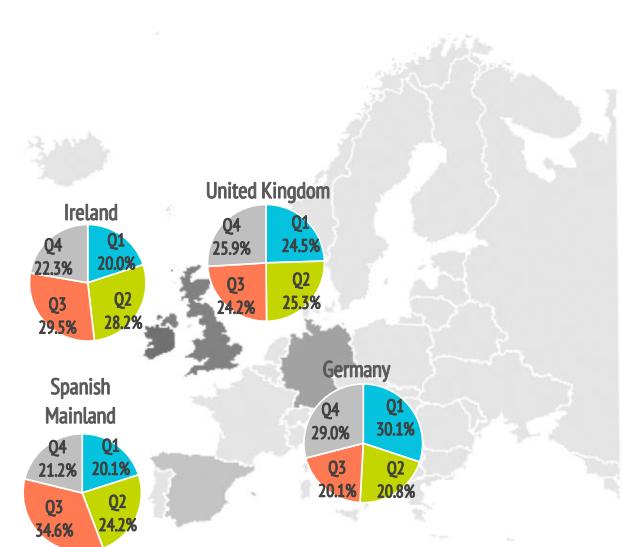
How many are loyal to the Canary Islands?



Repeat tourists	2019Q1	2019Q1	2019Q1	2019Q1	2019Q1
Repeat tourists (last 5 years)	9.2%	12.5%	10.7%	10.9%	10.8%
Repeat tourists (last 5 years)(5 or more visits)	76.4%	76.2%	75.6%	78.8%	76.8%
At least 10 previous visits	19.5%	22.1%	18.7%	20.6%	20.2%

LANZAROTE: MAIN MARKETS

% TOURISTS BY QUARTER OF TRIP



TOURIST PROFILE BY QUARTER OF TRIP (2019)

LANZAROTE



Where are they from?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
United Kingdom	47.1%	50.4%	46.8%	48.6%	48.2%
Germany	13.1%	9.3%	8.8%	12.3%	10.9%
Spanish Mainland	8.2%	10.3%	14.3%	8.5%	10.3%
Ireland	8.1%	11.8%	12.0%	8.8%	10.1%
France	5.2%	5.4%	5.4%	4.9%	5.2%
Netherlands	4.0%	2.7%	2.9%	3.6%	3.3%
Italy	2.5%	2.3%	2.4%	2.4%	2.4%
Belgium	1.5%	1.9%	1.9%	1.8%	1.8%
Switzerland	1.5%	1.8%	1.2%	1.6%	1.5%
Poland	2.0%	1.0%	0.9%	1.0%	1.2%
Denmark	1.0%	0.8%	0.6%	1.5%	1.0%
Sweden	1.9%	0.4%	0.0%	1.2%	0.9%
Norway	1.3%	0.4%	0.0%	1.0%	0.7%
Finland	0.9%	0.0%	0.0%	0.9%	0.5%
Czech Republic	0.2%	0.6%	0.4%	0.3%	0.4%
Austria	0.3%	0.1%	0.3%	0.2%	0.2%
Portugal	0.1%	0.1%	0.5%	0.2%	0.2%
Others	1.0%	0.6%	1.6%	1.3%	1.1%

Who are they?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
<u>Gender</u>					
Men	49.4%	42.5%	46.9%	49.8%	47.2%
Women	50.6%	57.5%	53.1%	50.2%	52.8%
<u>Age</u>					
Average age (tourist > 15 years old)	49.1	50.9	46.2	51.7	49.5
Standard deviation	15.4	16.4	15.1	14.3	15.4
<u>Age range (> 15 years old)</u>					
16 - 24 years old	5.1%	6.2%	8.0%	3.0%	5.5%
25 - 30 years old	9.7%	7.6%	10.8%	6.7%	8.7%
31 - 45 years old	26.7%	25.1%	28.5%	23.1%	25.8%
46 - 60 years old	32.6%	27.7%	33.3%	36.8%	32.7%
Over 60 years old	26.0%	33.4%	19.5%	30.4%	27.3%
<u>Occupation</u>					
Salaried worker	48.8%	47.5%	61.8%	55.4%	53.4%
Self-employed	13.2%	12.2%	10.1%	11.8%	11.8%
Unemployed	0.9%	0.9%	0.7%	0.4%	0.7%
Business owner	8.7%	8.3%	6.3%	6.5%	7.4%
Student	2.4%	3.1%	4.4%	1.8%	2.9%
Retired	24.4%	25.5%	15.1%	22.7%	21.9%
Unpaid domestic work	0.8%	0.8%	1.2%	1.1%	1.0%
Others	0.8%	1.8%	0.3%	0.4%	0.8%
<u>Annual household income level</u>					
Less than €25,000	15.1%	16.8%	16.3%	14.3%	15.6%
€25,000 - €49,999	41.5%	35.7%	40.3%	33.5%	37.7%
€50,000 - €74,999	21.2%	24.5%	24.3%	25.1%	23.8%
More than €74,999	22.3%	23.0%	19.1%	27.1%	22.9%
<u>Education level</u>					
No studies	5.0%	6.4%	9.1%	4.7%	6.3%
Primary education	1.4%	2.4%	1.8%	1.9%	1.9%
Secondary education	20.5%	24.2%	20.9%	20.7%	21.5%
Higher education	73.1%	67.1%	68.2%	72.8%	70.3%

Who do they come with?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
Unaccompanied	6.8%	5.8%	4.5%	5.1%	5.5%
Only with partner	54.1%	47.0%	42.2%	54.5%	49.5%
Only with children (< 13 years old)	4.5%	5.0%	6.8%	3.3%	4.9%
Partner + children (< 13 years old)	5.9%	8.1%	9.4%	6.7%	7.5%
Other relatives	8.6%	12.8%	14.1%	12.0%	11.9%
Friends	8.2%	5.9%	4.0%	5.0%	5.8%
Work colleagues	0.2%	0.0%	0.0%	0.1%	0.1%
Organized trip	0.1%	0.3%	0.2%	0.1%	0.2%
Other combinations ⁽¹⁾	11.6%	15.1%	18.8%	13.3%	14.7%

⁽¹⁾ Different situations have been isolated

Tourists with children	14.4%	21.5%	25.4%	15.8%	19.2%
- Between 0 and 2 years old	2.6%	1.7%	1.0%	1.4%	1.7%
- Between 3 and 12 years old	10.4%	17.7%	23.3%	13.4%	16.2%
- Between 0 -2 and 3-12 years	1.4%	2.1%	1.1%	1.0%	1.4%
Tourists without children	85.6%	78.5%	74.6%	84.2%	80.8%
Group composition:					
- 1 person	10.0%	8.6%	6.6%	7.0%	8.1%
- 2 people	61.0%	54.1%	49.3%	60.0%	56.2%
- 3 people	11.8%	12.9%	14.4%	10.8%	12.5%
- 4 or 5 people	14.5%	19.2%	23.4%	18.1%	18.8%
- 6 or more people	2.6%	5.1%	6.2%	4.0%	4.5%
Average group size:	2.46	2.77	2.92	2.65	2.70

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19.2% of tourists travel with children.



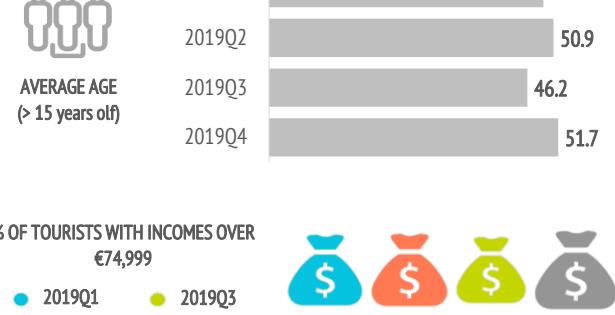
(under the age of 13)



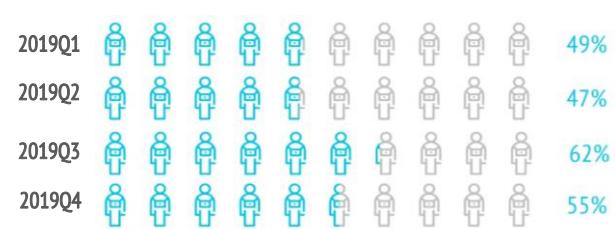
Who are they?

	2019Q1	2019Q2	2019Q3	2019Q4	2019
<u>Gender</u>					
Men	49.4%	42.5%	46.9%	49.8%	47.2%
Women	50.6%	57.5%	53.1%	50.2%	52.8%
<u>Age</u>					
Average age (tourist > 15 years old)	49.1	50.9	46.2	51.7	49.5
Standard deviation	15.4	16.4	15.1	14.3	15.4
<u>Age range (> 15 years old)</u>					
16 - 24 years old	5.1%	6.2%	8.0%	3.0%	5.5%
25 - 30 years old	9.7%	7.6%	10.8%	6.7%	8.7%
31 - 45 years old	26.7%	25.1%	28.5%	23.1%	25.8%
46 - 60 years old	32.6%	27.7%	33.3%	36.8%	32.7%
Over 60 years old	26.0%	33.4%	19.5%	30.4%	27.3%
<u>Occupation</u>					
Salaried worker	48.8%	47.5%	61.8%	55.4%	53.4%
Self-employed	13.2%	12.2%	10.1%	11.8%	11.8%
Unemployed	0.9%	0.9%	0.7%	0.4%	0.7%
Business owner	8.7%	8.3%	6.3%	6.5%	7.4%
Student	2.4%	3.1%	4.4%	1.8%	2.9%
Retired	24.4%	25.5%	15.1%	22.7%	21.9%
Unpaid domestic work	0.8%	0.8%	1.2%	1.1%	1.0%
Others	0.8%	1.8%	0.3%	0.4%	0.8%
<u>Annual household income level</u>					
Less than €25,000	15.1%	16.8%	16.3%	14.3%	15.6%
€25,000 - €49,999	41.5%	35.7%	40.3%	33.5%	37.7%
€50,000 - €74,999	21.2%	24.5%	24.3%	25.1%	23.8%
More than €74,999	22.3%	23.0%	19.1%	27.1%	22.9%
<u>Education level</u>					
No studies	5.0%	6.4%	9.1%	4.7%	6.3%
Primary education	1.4%	2.4%	1.8%	1.9%	1.9%
Secondary education	20.5%	24.2%	20.9%	20.7%	21.5%
Higher education	73.1%	67.1%	68.2%	72.8%	70.3%

% OF TOURISTS WITH INCOMES OVER €74,999



% SALARIED WORKED TOURISTS



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.