

Tourist profile trend (2016)

Lanzarote: Fourth Quarter



How many are they and how much do they spend?



How do they book?

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	445,569	482,417	467,397	527,062	600,909
Average daily expenditure (€)	122.95	124.63	131.97	129.22	141.11
.in their place of residence	85.93	87.64	94.84	92.57	106.10
.in the Canary Islands	37.02	37.00	37.12	36.65	35.01
Average lenght of stay	8.60	8.03	8.42	8.90	8.67
Turnover per tourist (€)	985	949	1,022	1,068	1,145
Total turnover (> 16 years old) (€m)	439	458	478	563	688
Share of total turnover	25.9%	25.6%	24.9%	26.0%	26.6%
Share of total tourist	25.6%	26.5%	24.4%	25.9%	25.8%
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	33.94	32.45	35.36	36.40	50.24
- Accommodation	30.81	28.33	30.32	31.10	44.82
- Additional accommodation expenses	3.13	4.13	5.04	5.30	5.42
Transport:	27.42	27.33	26.27	28.98	27.37
- Public transport	3.43	3.72	5.32	4.54	5.19
- Taxi	5.88	6.35	6.45	6.83	6.98
- Car rental	18.11	17.26	14.51	17.61	15.19
Food and drink:	151.23	134.93	138.22	157.04	138.83
- Food purchases at supermarkets	56.84	50.14	51.70	57.13	54.07
- Restaurants	94.39	84.79	86.52	99.90	84.76
Souvenirs:	44.85	41.51	43.94	41.87	32.36
Leisure:	31.78	34.03	36.07	31.01	27.91
- Organized excursions	12.71	14.74	15.32	13.89	14.85
- Leisure, amusement	2.41	3.24	3.01	2.20	2.76
- Trip to other islands	2.07	1.08	1.92	1.64	1.51
- Sporting activities	3.92	5.67	5.42	3.62	3.59
- Cultural activities	3.99	4.21	4.61	3.79	2.65
- Discos and disco-pubs	6.69	5.10	5.80	5.87	2.56
Others:	11.45	11.82	10.57	10.47	10.08
- Wellness	3.02	2.27	2.49	2.96	3.12
- Medical expenses	1.80	1.21	1.06	1.14	1.62
- Other expenses	6.63	8.34	7.02	6.37	5.34

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.5%	0.5%	0.3%	0.5%	0.3%
Between 2 and 7 days	5.6%	10.3%	6.8%	6.4%	4.9%
Between 8 and 15 days	6.1%	11.5%	9.1%	7.4%	4.3%
Between 16 and 30 days	16.5%	18.5%	15.4%	14.3%	11.8%
Between 31 and 90 days	34.5%	36.7%	35.3%	36.0%	36.9%
More than 90 days	37.0%	22.5%	33.0%	35.4%	41.8%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	9.1%	4.9%	5.3%	4.8%	4.1%
Flight and accommodation (room only)	31.2%	32.2%	29.6%	32.7%	26.9%
Flight and accommodation (B&B)	9.3%	9.1%	8.9%	7.7%	7.6%
Flight and accommodation (half board)	16.6%	14.8%	18.5%	17.9%	18.5%
Flight and accommodation (full board)	1.5%	2.5%	2.8%	3.3%	3.8%
Flight and accommodation (all inclusive)	32.3%	36.4%	34.8%	33.7%	39.0%
% Tourists using low-cost airlines	43.4%	56.7%	55.6%	53.3%	50.3%
Other expenses in their place of residence:					
- Car rental	9.5%	11.1%	10.6%	10.7%	10.9%
- Sporting activities	5.2%	7.2%	6.0%	5.0%	5.9%
- Excursions	3.0%	3.9%	4.1%	4.5%	4.3%
- Trip to other islands	0.3%	0.7%	0.4%	0.8%	1.0%

(*) 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?

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	43.6%	47.1%	48.2%	47.7%	45.8%
- Tour Operator's website	79.7%	85.6%	79.2%	79.9%	80.2%
Accommodation	20.0%	16.5%	18.2%	17.2%	18.8%
- Accommodation's website	87.1%	85.0%	85.2%	83.7%	84.3%
Travel agency (High street)	19.0%	15.1%	15.4%	16.8%	18.6%
Online Travel Agency (OTA)	13.1%	19.1%	16.6%	16.0%	14.2%
No need to book accommodation	4.3%	2.2%	1.7%	2.3%	2.6%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight booking					
Tour Operator	47.6%	50.2%	51.3%	47.7%	48.3%
- Tour Operator's website	79.1%	85.2%	78.8%	81.2%	78.9%
Airline	25.9%	24.2%	25.1%	27.2%	26.0%
- Airline's website	96.9%	97.2%	98.0%	96.0%	97.9%
Travel agency (High street)	19.3%	13.2%	14.2%	15.6%	18.0%
Online Travel Agency (OTA)	7.3%	12.3%	9.4%	9.5%	7.7%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	9.8%	8.4%	7.7%	6.2%	6.5%
4* Hotel	35.2%	37.2%	37.9%	36.5%	41.8%
1-2-3* Hotel	12.1%	13.0%	14.7%	12.5%	9.1%
Apartment	38.9%	39.6%	37.8%	42.4%	40.6%
Property (privately-owned, friends, family)	3.6%	1.3%	1.5%	1.8%	1.1%
Others	0.5%	0.5%	0.4%	0.5%	0.8%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	59.4%	57.8%	64.4%	50.8%	46.0%
Percentage of women	40.6%	42.2%	35.6%	49.2%	54.0%
Age					
Average age (tourists > 16 years old)	45.6	43.3	46.6	48.8	50.9
Standard deviation	12.9	13.8	13.7	14.6	14.2
Age range (> 16 years old)					
16-24 years old	4.3%	7.0%	4.6%	4.9%	3.0%
25-30 years old	9.9%	14.7%	10.4%	8.8%	5.6%
31-45 years old	34.7%	35.9%	31.5%	28.2%	28.0%
46-60 years old	37.6%	29.9%	35.8%	33.6%	35.4%
Over 60 years old	13.5%	12.6%	17.8%	24.6%	28.1%
Occupation					
Business owner or self-employed	26.5%	28.4%	28.0%	25.4%	22.8%
Upper/Middle management employee	37.5%	38.6%	35.0%	32.4%	34.1%
Auxiliary level employee	18.1%	18.2%	14.7%	13.3%	12.9%
Students	2.2%	2.3%	3.3%	3.3%	1.9%
Retired	13.1%	10.7%	16.7%	23.2%	26.5%
Unemployed / unpaid dom. work	2.6%	1.7%	2.3%	2.3%	1.7%
Annual household income level					
€12,000 - €24,000	14.2%	15.1%	16.4%	16.2%	13.7%
€24,001 - €36,000	18.6%	18.1%	17.1%	19.9%	17.2%
€36,001 - €48,000	18.9%	19.8%	14.9%	16.9%	16.5%
€48,001 - €60,000	14.6%	14.2%	15.4%	14.5%	14.9%
€60,001 - €72,000	8.9%	9.0%	9.8%	10.0%	10.3%
€72,001 - €84,000	7.8%	6.6%	7.7%	5.7%	7.7%
More than €84,000	16.9%	17.1%	18.7%	16.8%	19.7%

Tourist profile trend (2016)

Lanzarote: Fourth Quarter



Which island do they choose?

Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	445,569	482,417	467,397	527,062	600,909
- Fuerteventura	371,091	407,337	398,938	437,284	495,222
- Gran Canaria	788,308	901,778	863,399	951,656	1,064,140
- Tenerife	1,026,851	1,123,476	1,092,650	1,144,231	1,280,669
- La Palma	37,879	35,785	37,346	45,080	65,961

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	16.7%	16.3%	16.3%	17.0%	17.1%
- Fuerteventura	13.9%	13.8%	14.0%	14.1%	14.1%
- Gran Canaria	29.5%	30.6%	30.2%	30.6%	30.3%
- Tenerife	38.5%	38.1%	38.2%	36.8%	36.5%
- La Palma	1.4%	1.2%	1.3%	1.5%	1.9%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	6.0%	5.7%	5.7%	5.7%	3.7%
Only with partner	59.8%	61.6%	53.9%	56.5%	49.2%
Only with children (under the age of 13)	0.5%	2.5%	1.5%	1.3%	1.1%
Partner + children (under the age of 13)	11.7%	8.8%	12.6%	11.6%	15.3%
Other relatives	4.4%	4.5%	5.1%	6.7%	7.9%
Friends	2.6%	5.1%	5.1%	3.9%	3.4%
Work colleagues	0.5%	0.2%	0.2%	0.2%	0.3%
Other combinations ⁽¹⁾	14.7%	11.6%	16.0%	14.2%	19.2%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	95.3%	96.2%	97.7%	96.3%	94.9%
Average rating (scale 1-10)	8.93	8.96	9.10	9.14	8.97

How many are loyal to the destination?

Repeat tourists of the island	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	50.6%	48.6%	51.6%	54.2%	56.0%
In love (at least 10 previous visits)	5.2%	3.7%	5.6%	6.9%	7.7%

Where are they from?



Ten main source markets	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
United Kingdom	211,433	215,243	220,965	250,787	283,354
Germany	64,065	69,884	65,989	71,092	88,860
Ireland	38,025	36,978	35,699	43,976	47,022
Spanish Mainland	44,711	46,619	40,156	38,340	46,378
France	8,712	16,831	14,617	24,221	24,075
Netherlands	11,773	14,978	16,379	20,098	22,574
Italy	5,078	5,146	6,456	7,993	13,855
Sweden	8,529	15,688	11,765	9,742	12,640
Norway	12,354	22,054	12,589	11,443	10,944
Switzerland	5,945	5,815	6,021	8,851	9,984

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	93.4%	94.5%	93.7%	96.1%	94.4%
Tranquillity/rest/relaxation	44.0%	46.4%	43.1%	40.7%	37.2%
Beaches	23.3%	25.2%	28.2%	27.1%	26.3%
Scenery	18.6%	25.3%	24.1%	24.8%	24.7%
Visiting new places	17.3%	15.8%	15.0%	14.3%	14.9%
Ease of travel	16.9%	16.6%	14.3%	15.4%	13.6%
Price	20.9%	19.4%	15.9%	17.7%	12.2%
Suitable destination for children	6.2%	6.2%	9.0%	7.6%	11.9%
Security	5.5%	5.6%	6.5%	11.8%	11.8%
Quality of the environment	8.4%	7.8%	8.7%	8.7%	9.4%
Active tourism	3.1%	2.8%	4.6%	3.9%	3.8%
Culture	2.5%	4.6%	4.7%	3.9%	3.8%
Nightlife/fun	3.2%	2.5%	2.4%	1.7%	2.3%
Shopping	1.6%	2.0%	1.4%	2.3%	2.2%
Nautical activities	1.9%	1.8%	2.0%	1.5%	1.7%
Health-related tourism	0.7%	0.5%	0.5%	0.3%	1.0%

* Multi-choice question

What did motivate them to come?

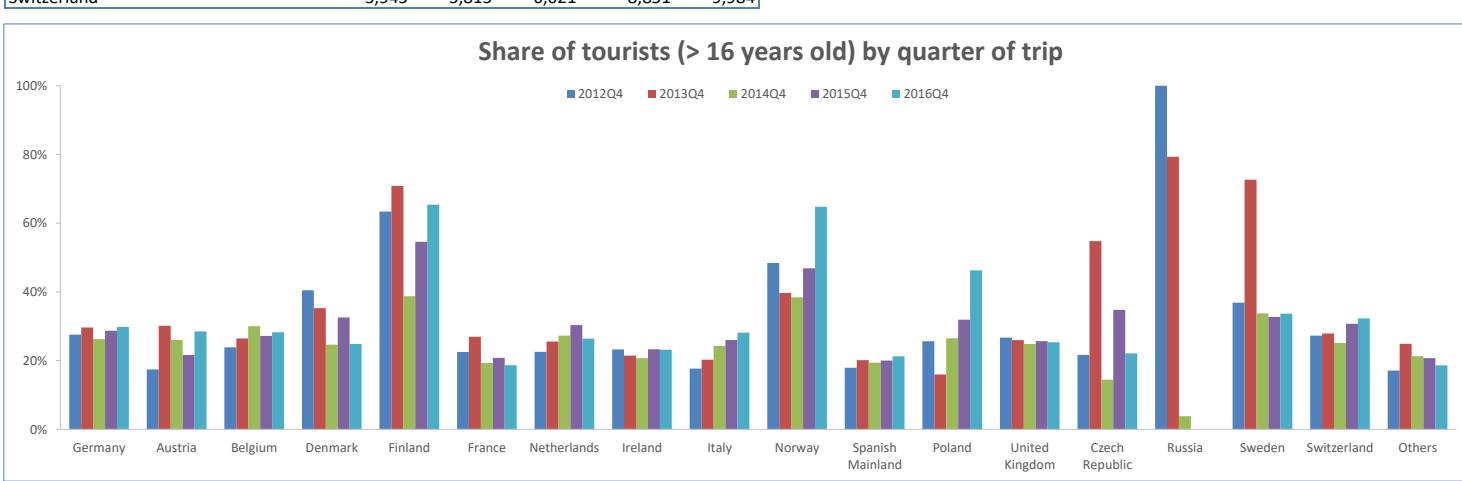


Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	67.5%	69.6%	71.6%	72.8%	73.4%
Recommendation by friends or relatives	34.3%	37.4%	35.7%	35.5%	34.6%
The Canary Islands television channel	0.1%	0.1%	0.2%	0.4%	0.1%
Other television or radio channels	0.5%	0.5%	0.5%	0.3%	0.4%
Information in the press/magazines/books	2.8%	4.6%	4.2%	3.8%	4.7%
Attendance at a tourism fair	0.9%	0.0%	0.2%	0.2%	0.4%
Tour Operator's brochure or catalogue	9.6%	7.9%	7.8%	8.1%	9.2%
Recommendation by Travel Agency	10.3%	7.4%	8.7%	9.4%	8.8%
Information obtained via the Internet	25.3%	36.1%	33.6%	28.6%	26.7%
Senior Tourism programme	0.0%	0.4%	0.4%	0.3%	0.1%
Others	5.3%	6.2%	5.2%	5.1%	4.8%

* Multi-choice question

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

■ 2012Q4 ■ 2013Q4 ■ 2014Q4 ■ 2015Q4 ■ 2016Q4



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.