

# Tourist profile trend (2017)

## Lanzarote: First Quarter



### How many are they and how much do they spend?



### How do they book?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	429,077	466,498	483,781	560,886	587,352
Average daily expenditure (€)	117.91	118.89	124.43	126.54	135.29
.in their place of residence	81.73	82.55	88.83	90.40	99.09
.in the Canary Islands	36.18	36.34	35.60	36.13	36.20
Average lenght of stay	9.50	9.16	9.32	9.85	9.45
Turnover per tourist (€)	1,017	994	1,044	1,129	1,144
Total turnover (> 16 years old) (€m)	436	464	505	633	672
Share of total turnover	24.5%	24.2%	23.3%	24.5%	--
Share of total tourist	23.6%	24.4%	23.8%	24.1%	--
<b>Expenditure in the Canary Islands per tourist and trip (€) (*)</b>					
<b>Accommodation (**):</b>	33.72	41.28	35.12	52.67	51.60
- Accommodation	30.03	37.67	31.70	47.19	45.85
- Additional accommodation expenses	3.69	3.62	3.43	5.48	5.75
<b>Transport:</b>	31.06	28.97	35.78	32.47	32.22
- Public transport	5.13	3.91	4.61	4.82	6.75
- Taxi	7.94	6.68	8.12	8.06	6.78
- Car rental	18.00	18.39	23.05	19.59	18.69
<b>Food and drink:</b>	171.01	154.79	154.13	157.62	156.21
- Food purchases at supermarkets	71.30	55.25	51.17	65.06	57.83
- Restaurants	99.71	99.54	102.96	92.56	98.38
<b>Souvenirs:</b>	37.86	32.61	37.88	43.69	32.32
<b>Leisure:</b>	33.68	35.32	31.49	26.80	26.44
- Organized excursions	13.42	15.52	12.18	13.29	13.91
- Leisure, amusement	3.86	3.36	2.51	1.62	2.21
- Trip to other islands	1.87	1.85	2.13	2.07	2.59
- Sporting activities	4.76	4.47	4.74	3.76	2.86
- Cultural activities	4.21	2.76	3.98	3.58	2.63
- Discos and disco-pubs	5.56	7.36	5.94	2.48	2.25
<b>Others:</b>	15.91	13.53	14.48	10.79	9.39
- Wellness	3.35	4.37	2.80	3.60	2.11
- Medical expenses	2.36	2.04	2.10	1.68	1.88
- Other expenses	10.21	7.13	9.58	5.51	5.39

### How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.5%	0.2%	0.5%	0.8%	0.3%
Between 2 and 7 days	7.4%	7.0%	7.3%	6.3%	4.5%
Between 8 and 15 days	7.8%	9.2%	8.8%	9.7%	6.9%
Between 16 and 30 days	17.9%	19.2%	14.9%	16.6%	15.2%
Between 31 and 90 days	36.2%	39.0%	35.7%	37.0%	38.1%
More than 90 days	30.3%	25.5%	32.8%	29.7%	35.0%

### What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	8.5%	5.5%	5.3%	5.2%	5.5%
Flight and accommodation (room only)	35.2%	33.0%	33.1%	27.7%	29.5%
Flight and accommodation (B&B)	5.9%	10.5%	9.1%	9.0%	9.2%
Flight and accommodation (half board)	20.4%	16.7%	17.9%	20.9%	19.9%
Flight and accommodation (full board)	2.7%	3.5%	3.3%	3.7%	2.7%
Flight and accommodation (all inclusive)	27.3%	30.8%	31.2%	33.6%	33.2%
<b>% Tourists using low-cost airlines</b>	47.0%	51.6%	53.7%	50.6%	54.2%
<b>Other expenses in their place of residence:</b>					
- Car rental	11.1%	11.1%	11.4%	10.2%	11.4%
- Sporting activities	7.1%	5.0%	5.1%	4.1%	4.2%
- Excursions	3.6%	4.1%	4.2%	3.5%	4.7%
- Trip to other islands	0.6%	0.6%	0.8%	0.6%	0.5%

(\*) 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?

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	43.3%	50.8%	48.5%	44.7%	44.3%
- Tour Operator's website	80.6%	87.3%	76.2%	76.8%	76.3%
<b>Accommodation</b>	19.2%	16.1%	17.7%	18.9%	17.7%
- Accommodation's website	85.3%	86.7%	84.8%	84.8%	89.1%
<b>Travel agency (High street)</b>	18.4%	13.6%	16.0%	17.9%	16.3%
<b>Online Travel Agency (OTA)</b>	15.9%	17.8%	16.0%	15.4%	19.1%
<b>No need to book accommodation</b>	3.0%	1.6%	1.8%	3.0%	2.6%

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Flight booking</b>					
<b>Tour Operator</b>	45.0%	52.6%	49.8%	46.7%	45.0%
- Tour Operator's website	78.1%	83.7%	75.1%	75.6%	76.0%
<b>Airline</b>	27.5%	23.2%	26.5%	25.7%	30.2%
- Airline's website	96.6%	96.4%	97.5%	98.3%	97.9%
<b>Travel agency (High street)</b>	15.3%	12.9%	14.1%	17.7%	15.0%
<b>Online Travel Agency (OTA)</b>	12.2%	11.3%	9.6%	9.9%	9.8%

### Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>5* Hotel</b>	6.4%	7.5%	5.8%	5.1%	5.4%
<b>4* Hotel</b>	31.0%	34.7%	35.4%	39.9%	40.5%
<b>1-2-3* Hotel</b>	11.9%	14.6%	15.1%	12.8%	9.9%
<b>Apartment</b>	46.6%	41.8%	41.9%	40.0%	41.4%
<b>Property (privately-owned, friends, family)</b>	2.7%	1.1%	1.2%	1.6%	1.7%
<b>Others</b>	1.3%	0.4%	0.5%	0.5%	1.1%

### Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Gender</b>					
Percentage of men	61.1%	56.4%	56.0%	48.8%	46.1%
Percentage of women	38.9%	43.6%	44.0%	51.2%	53.9%
<b>Age</b>					
Average age (tourists > 16 years old)	47.6	49.1	50.6	55.2	54.3
Standard deviation	13.9	14.6	14.2	15.0	14.3
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	5.5%	3.6%	3.5%	3.0%	2.1%
25-30 years old	7.4%	8.5%	7.2%	5.4%	3.9%
31-45 years old	33.0%	28.2%	24.4%	17.8%	22.6%
46-60 years old	32.9%	35.6%	37.7%	31.4%	33.9%
Over 60 years old	21.2%	24.0%	27.3%	42.4%	37.5%
<b>Occupation</b>					
Business owner or self-employed	22.9%	25.0%	23.4%	21.4%	22.1%
Upper/Middle management employee	36.1%	35.2%	31.8%	26.3%	29.5%
Auxiliary level employee	15.5%	13.5%	15.3%	9.7%	10.1%
Students	3.9%	2.5%	2.7%	1.9%	1.7%
Retired	20.2%	22.7%	25.9%	39.4%	35.0%
Unemployed / unpaid dom. work	1.5%	1.1%	1.0%	1.3%	1.5%
<b>Annual household income level</b>					
€12,000 - €24,000	17.7%	14.1%	15.3%	14.1%	15.6%
€24,001 - €36,000	18.9%	16.6%	16.8%	22.4%	18.9%
€36,001 - €48,000	14.8%	19.4%	19.1%	18.0%	16.5%
€48,001 - €60,000	17.4%	16.8%	14.9%	15.0%	15.6%
€60,001 - €72,000	8.3%	8.9%	10.5%	9.0%	8.8%
€72,001 - €84,000	8.8%	8.1%	6.6%	6.3%	6.7%
More than €84,000	14.2%	16.2%	16.7%	15.2%	17.9%

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### Lanzarote: First Quarter



#### Which island do they choose?

Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	429,077	466,498	483,781	560,886	587,352
- Fuerteventura	366,481	363,967	394,726	473,171	465,858
- Gran Canaria	819,171	895,237	871,881	991,937	1,048,751
- Tenerife	1,059,587	1,150,121	1,179,865	1,261,312	1,325,439
- La Palma	48,806	36,356	42,548	61,898	78,022

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	15.8%	16.0%	16.3%	16.7%	16.8%
- Fuerteventura	13.5%	12.5%	13.3%	14.1%	13.3%
- Gran Canaria	30.1%	30.7%	29.3%	29.6%	29.9%
- Tenerife	38.9%	39.5%	39.7%	37.7%	37.8%
- La Palma	1.8%	1.2%	1.4%	1.8%	2.2%

#### Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	9.1%	5.0%	5.7%	4.8%	4.7%
Only with partner	62.7%	61.0%	63.8%	62.9%	55.3%
Only with children (under the age of 13)	0.4%	0.9%	0.6%	0.7%	1.2%
Partner + children (under the age of 13)	9.7%	9.9%	8.0%	7.5%	11.7%
Other relatives	4.7%	3.5%	4.4%	5.3%	6.2%
Friends	4.1%	5.1%	6.7%	5.7%	4.8%
Work colleagues	0.2%	0.3%	0.2%	0.4%	0.1%
Other combinations <sup>(1)</sup>	9.1%	14.2%	10.6%	12.7%	15.9%

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

#### How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	96.2%	96.1%	93.9%	94.9%	94.7%
Average rating (scale 1-10)	9.12	8.98	8.82	9.06	8.98

#### How many are loyal to the destination?

Repeat tourists of the island	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	55.9%	53.6%	55.1%	58.9%	59.1%
In love (at least 10 previous visits)	6.4%	5.5%	6.3%	6.7%	7.3%

#### Where are they from?



Ten main source markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
United Kingdom	188,966	205,313	221,213	259,030	270,611
Germany	68,842	69,337	71,353	77,865	78,312
Ireland	35,931	34,251	40,764	43,512	47,536
Spanish Mainland	44,342	32,812	32,191	45,200	36,993
France	11,554	19,948	23,498	33,871	30,211
Netherlands	15,217	16,638	16,365	21,248	26,713
Italy	3,846	3,999	5,382	8,931	14,530
Poland	708	4,803	5,127	3,797	13,267
Denmark	13,039	10,189	9,500	11,420	10,902
Sweden	5,910	20,091	16,811	19,490	10,864

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	96.2%	96.0%	94.0%	95.2%	94.7%
Tranquillity/rest/relaxation	44.2%	45.9%	42.8%	39.8%	41.3%
Scenery	24.9%	23.1%	25.8%	25.1%	25.6%
Beaches	20.5%	23.1%	18.9%	18.9%	19.9%
Ease of travel	15.2%	14.8%	14.1%	16.8%	16.3%
Price	17.0%	19.5%	17.1%	16.5%	15.1%
Visiting new places	12.8%	14.0%	15.3%	13.4%	14.7%
Security	8.3%	5.9%	6.7%	12.1%	12.0%
Quality of the environment	11.2%	8.9%	9.8%	11.7%	11.0%
Suitable destination for children	5.5%	6.4%	5.1%	5.7%	7.9%
Active tourism	6.4%	5.6%	5.4%	5.3%	5.3%
Culture	4.4%	3.6%	6.0%	4.6%	5.0%
Shopping	1.1%	2.0%	2.7%	2.0%	2.0%
Nightlife/fun	2.0%	3.3%	3.0%	2.5%	2.0%
Rural tourism	1.4%	0.9%	1.4%	1.1%	1.2%
Health-related tourism	1.1%	0.6%	0.5%	0.5%	0.8%

\* Multi-choice question

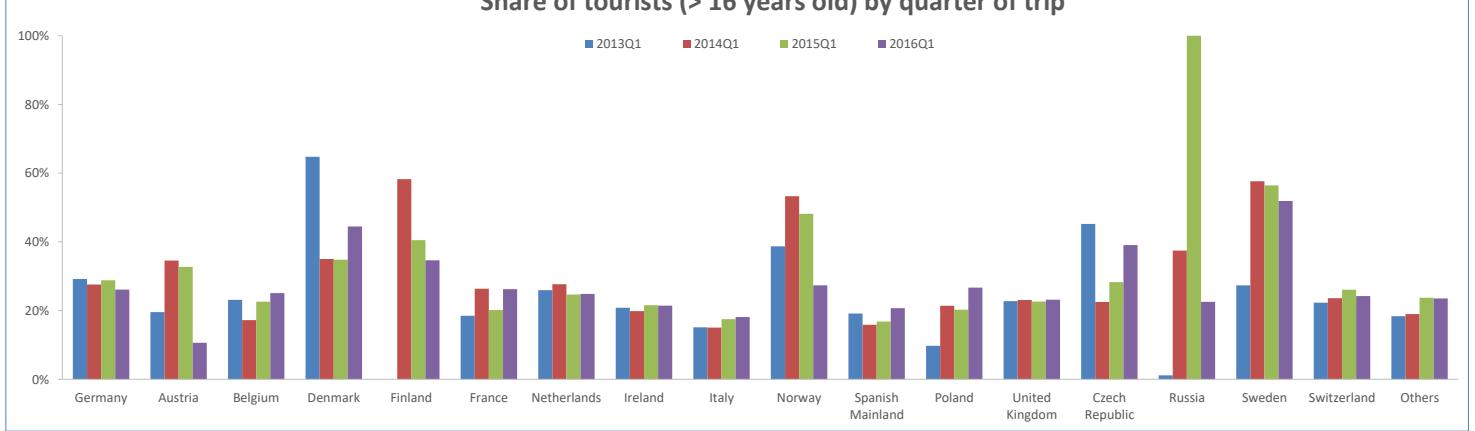
#### What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	74.5%	75.0%	74.1%	75.8%	76.2%
Recommendation by friends or relatives	36.5%	31.8%	33.5%	29.3%	33.1%
The Canary Islands television channel	0.2%	0.1%	0.3%	0.3%	0.1%
Other television or radio channels	0.7%	0.5%	0.4%	0.9%	1.1%
Information in the press/magazines/books	4.5%	5.9%	4.2%	4.1%	5.2%
Attendance at a tourism fair	0.1%	0.3%	0.1%	0.4%	0.3%
Tour Operator's brochure or catalogue	6.9%	9.3%	7.1%	10.5%	8.2%
Recommendation by Travel Agency	6.5%	5.9%	8.4%	7.7%	7.6%
Information obtained via the Internet	29.6%	34.2%	28.9%	26.0%	25.8%
Senior Tourism programme	0.7%	0.7%	0.4%	0.3%	0.1%
Others	4.1%	4.2%	4.8%	6.0%	4.9%

\* Multi-choice question

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



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.