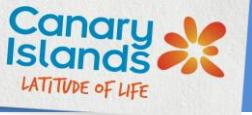


Tourist profile trend (2017)

Lanzarote: Second Quarter



How many are they and how much do they spend?



How do they book?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	417,411	469,065	478,832	562,021	596,941
Average daily expenditure (€)	113.33	119.30	124.31	122.38	125.42
.in their place of residence	78.58	83.03	90.35	87.10	88.72
.in the Canary Islands	34.74	36.27	33.96	35.28	36.70
Average lenght of stay	8.40	8.40	8.37	8.73	8.25
Turnover per tourist (€)	885	930	959	1,000	967
Total turnover (> 16 years old) (€m)	369	436	459	562	577
Share of total turnover	20.7%	22.7%	21.2%	21.8%	--
Share of total tourist	22.9%	24.5%	23.5%	24.1%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	28.71	35.20	27.61	39.63	42.19
- Accommodation	22.92	31.00	22.92	35.00	37.13
- Additional accommodation expenses	5.78	4.19	4.69	4.64	5.06
Transport:	23.74	25.66	26.58	25.17	26.76
- Public transport	3.58	4.75	3.45	3.82	3.23
- Taxi	6.19	6.49	7.33	6.69	7.89
- Car rental	13.97	14.42	15.80	14.67	15.64
Food and drink:	131.40	134.66	131.35	140.80	143.52
- Food purchases at supermarkets	51.14	50.38	43.29	53.39	50.23
- Restaurants	80.26	84.28	88.05	87.41	93.29
Souvenirs:	44.58	43.26	37.93	40.17	34.65
Leisure:	31.58	35.38	31.20	29.49	28.15
- Organized excursions	12.12	15.63	12.88	15.16	13.38
- Leisure, amusement	3.31	2.60	2.48	1.77	2.37
- Trip to other islands	1.37	1.67	2.05	2.29	1.21
- Sporting activities	3.58	5.24	5.88	3.22	3.75
- Cultural activities	4.03	3.87	3.70	3.09	3.58
- Discos and disco-pubs	7.17	6.38	4.21	3.95	3.87
Others:	10.83	10.72	11.12	10.37	9.03
- Wellness	3.09	2.07	3.15	2.32	1.92
- Medical expenses	2.02	1.77	2.00	1.33	1.20
- Other expenses	5.73	6.89	5.97	6.73	5.92

How far in advance do they book their trip?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.5%	0.3%	0.5%	0.7%	0.4%
Between 2 and 7 days	6.7%	5.6%	6.0%	4.8%	7.0%
Between 8 and 15 days	8.1%	8.0%	8.3%	5.3%	5.9%
Between 16 and 30 days	19.9%	15.0%	14.9%	13.2%	10.8%
Between 31 and 90 days	35.7%	36.0%	37.8%	38.1%	38.3%
More than 90 days	29.1%	35.0%	32.6%	37.8%	37.6%

What do they book at their place of residence?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	9.0%	5.1%	3.4%	3.8%	4.7%
Flight and accommodation (room only)	29.9%	34.1%	30.8%	28.3%	31.7%
Flight and accommodation (B&B)	7.1%	6.7%	7.1%	7.7%	7.8%
Flight and accommodation (half board)	17.4%	17.4%	17.2%	18.0%	19.0%
Flight and accommodation (full board)	2.5%	1.7%	2.4%	3.5%	4.1%
Flight and accommodation (all inclusive)	34.2%	34.9%	39.0%	38.7%	32.8%
% Tourists using low-cost airlines	56.1%	56.4%	58.9%	54.2%	61.5%
Other expenses in their place of residence:					
- Car rental	10.5%	10.0%	10.3%	10.8%	10.9%
- Sporting activities	4.5%	4.1%	5.8%	4.8%	5.0%
- Excursions	3.7%	5.0%	4.0%	4.4%	3.7%
- Trip to other islands	0.6%	0.7%	0.4%	1.0%	0.8%

(*) 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?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Accommodation booking					
Tour Operator	41.5%	44.6%	43.5%	44.7%	41.0%
- Tour Operator's website	77.9%	80.7%	79.6%	79.9%	84.5%
Accommodation	19.6%	19.4%	17.9%	16.8%	19.4%
- Accommodation's website	81.9%	85.1%	82.1%	86.2%	87.1%
Travel agency (High street)	17.7%	16.8%	19.1%	18.6%	16.3%
Online Travel Agency (OTA)	16.5%	17.2%	17.5%	17.7%	20.4%
No need to book accommodation	4.7%	2.0%	2.1%	2.1%	2.9%

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight booking					
Tour Operator	44.7%	44.3%	48.5%	47.7%	43.6%
- Tour Operator's website	73.5%	79.8%	80.3%	76.7%	80.6%
Airline	28.4%	29.1%	25.6%	24.2%	30.0%
- Airline's website	96.9%	98.5%	97.7%	97.1%	98.6%
Travel agency (High street)	16.3%	15.8%	17.1%	16.9%	15.3%
Online Travel Agency (OTA)	10.7%	10.8%	8.7%	11.1%	11.1%

Where do they stay?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	8.9%	7.6%	8.2%	5.9%	7.4%
4* Hotel	34.4%	37.3%	37.1%	44.8%	37.6%
1-2-3* Hotel	11.5%	12.3%	14.1%	9.7%	11.3%
Apartment	41.6%	41.2%	39.4%	38.3%	42.0%
Property (privately-owned,friends,family)	2.9%	1.5%	1.0%	1.0%	1.2%
Others	0.6%	0.2%	0.3%	0.3%	0.5%

Who are they?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Gender					
Percentage of men	61.7%	59.3%	46.5%	44.2%	46.8%
Percentage of women	38.3%	40.7%	53.5%	55.8%	53.2%
Age					
Average age (tourists > 16 years old)	43.6	45.1	45.6	52.0	48.4
Standard deviation	13.9	14.8	14.6	15.3	15.5
Age range (> 16 years old)					
16-24 years old	8.6%	7.8%	7.6%	4.6%	6.1%
25-30 years old	11.7%	13.8%	10.8%	7.4%	9.9%
31-45 years old	37.6%	29.4%	33.1%	20.9%	27.4%
46-60 years old	28.4%	31.0%	29.7%	31.9%	31.6%
Over 60 years old	13.8%	18.0%	18.8%	35.1%	25.1%
Occupation					
Business owner or self-employed	25.2%	23.7%	25.4%	19.4%	22.7%
Upper/Middle management employee	36.9%	35.9%	35.0%	29.5%	35.0%
Auxiliary level employee	18.6%	17.9%	14.7%	14.0%	13.8%
Students	4.4%	3.7%	4.2%	2.9%	3.2%
Retired	12.4%	16.1%	18.2%	32.2%	23.3%
Unemployed / unpaid dom. work	2.4%	2.6%	2.5%	2.0%	2.0%
Annual household income level					
€12,000 - €24,000	15.9%	17.3%	15.6%	16.4%	14.5%
€24,001 - €36,000	20.6%	22.3%	17.8%	20.0%	18.5%
€36,001 - €48,000	17.0%	17.5%	17.5%	20.4%	18.4%
€48,001 - €60,000	15.6%	15.8%	15.3%	16.8%	16.3%
€60,001 - €72,000	8.9%	8.9%	11.3%	8.3%	9.1%
€72,001 - €84,000	7.1%	5.8%	7.1%	5.1%	6.9%
More than €84,000	15.0%	12.4%	15.4%	13.0%	16.3%

Tourist profile trend (2017)

Lanzarote: Second Quarter



Which island do they choose?

Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	417,411	469,065	478,832	562,021	596,941
- Fuerteventura	328,775	391,383	388,881	461,607	465,702
- Gran Canaria	530,449	586,170	605,205	750,985	833,264
- Tenerife	880,137	952,834	938,517	1,159,088	1,223,753
- La Palma	25,365	29,530	36,959	46,894	55,390

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	19.1%	19.3%	19.6%	18.9%	18.8%
- Fuerteventura	15.1%	16.1%	15.9%	15.5%	14.7%
- Gran Canaria	24.3%	24.1%	24.7%	25.2%	26.2%
- Tenerife	40.3%	39.2%	38.3%	38.9%	38.5%
- La Palma	1.2%	1.2%	1.5%	1.6%	1.7%

Who do they come with?



	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	5.5%	4.7%	4.6%	3.4%	3.5%
Only with partner	55.6%	59.0%	50.3%	61.4%	57.4%
Only with children (under the age of 13)	0.4%	0.8%	1.6%	0.7%	0.9%
Partner + children (under the age of 13)	12.3%	9.6%	15.0%	10.2%	12.3%
Other relatives	5.6%	5.5%	5.8%	6.0%	5.8%
Friends	6.3%	5.7%	7.1%	4.4%	4.8%
Work colleagues	0.2%	0.3%	0.3%	0.1%	0.1%
Other combinations ⁽¹⁾	13.9%	14.4%	15.3%	13.8%	15.3%

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

How do they rate the destination?



Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	94.8%	95.5%	95.7%	96.1%	95.9%
Average rating (scale 1-10)	8.91	9.06	8.99	9.14	9.13

How many are loyal to the destination?

Repeat tourists of the island	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	52.8%	51.5%	50.9%	55.0%	54.5%
In love (at least 10 previous visits)	5.9%	5.2%	4.9%	8.4%	8.2%

Where are they from?



Ten main source markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
United Kingdom	203,192	228,949	235,324	279,057	311,060
Germany	45,094	58,310	51,946	68,150	68,712
Ireland	47,808	51,388	53,699	57,992	57,642
Spanish Mainland	55,441	47,942	45,983	48,929	43,843
France	16,372	22,400	35,323	37,487	32,790
Netherlands	12,058	13,345	13,367	20,909	18,429
Italy	6,457	7,179	8,256	10,331	16,763
Poland	3,833	4,984	6,093	627	10,146
Belgium	5,628	6,246	7,474	7,154	8,554
Switzerland	4,653	5,785	5,495	5,728	7,516

Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	92.9%	92.8%	91.7%	92.5%	92.8%
Tranquillity/rest/relaxation	46.5%	46.1%	38.8%	42.2%	41.3%
Beaches	25.6%	26.8%	25.3%	24.8%	27.8%
Scenery	22.2%	23.5%	21.0%	23.6%	23.2%
Visiting new places	18.0%	18.2%	15.7%	17.8%	17.8%
Price	20.3%	22.1%	22.3%	18.6%	17.4%
Ease of travel	10.9%	12.5%	15.5%	12.3%	13.9%
Security	4.5%	5.2%	7.4%	12.8%	10.0%
Quality of the environment	10.7%	9.6%	9.3%	9.3%	9.8%
Suitable destination for children	8.5%	6.1%	9.9%	7.7%	9.3%
Active tourism	3.1%	4.2%	4.3%	3.4%	4.6%
Culture	4.9%	4.0%	4.1%	5.4%	3.7%
Nightlife/fun	4.0%	3.2%	2.6%	2.0%	2.6%
Shopping	2.7%	2.5%	1.9%	3.0%	1.8%
Health-related tourism	0.7%	1.2%	1.1%	1.4%	1.7%
Nautical activities	2.0%	1.7%	1.8%	1.1%	1.4%

* Multi-choice question

What did motivate them to come?

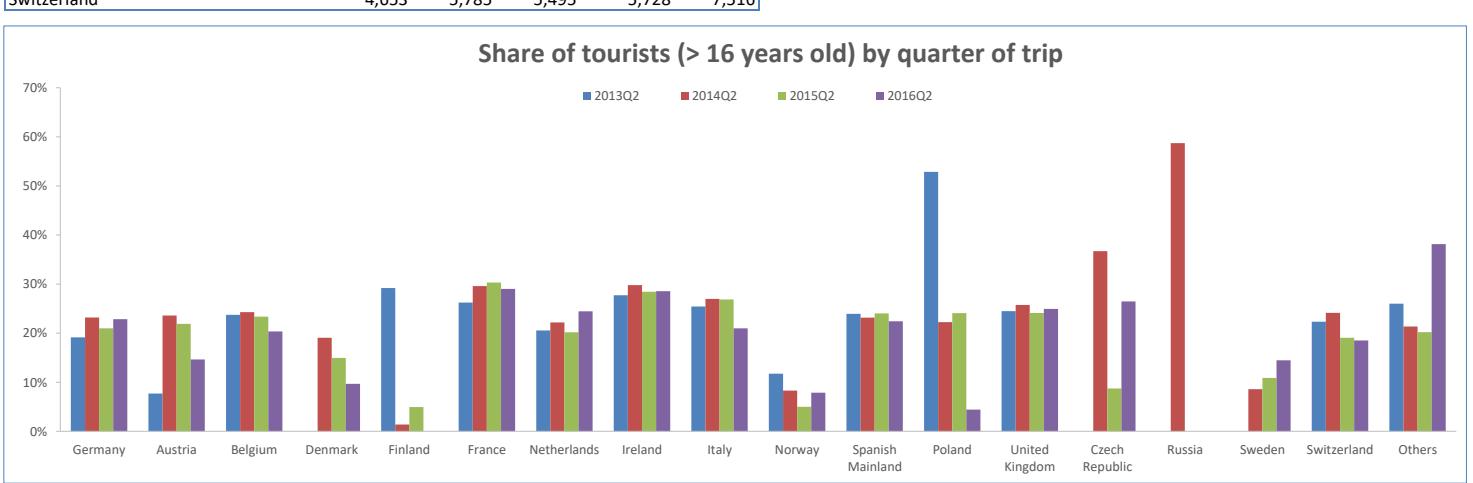


Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	69.4%	67.4%	64.5%	70.2%	69.6%
Recommendation by friends or relatives	40.9%	39.0%	39.5%	36.2%	37.4%
The Canary Islands television channel	0.1%	0.0%	0.3%	0.2%	0.3%
Other television or radio channels	0.1%	0.5%	0.4%	0.7%	0.9%
Information in the press/magazines/books	4.2%	4.3%	4.6%	3.6%	4.7%
Attendance at a tourism fair	0.3%	0.3%	0.6%	0.3%	0.4%
Tour Operator's brochure or catalogue	9.2%	11.3%	10.6%	11.0%	7.6%
Recommendation by Travel Agency	9.6%	9.1%	10.7%	8.1%	8.4%
Information obtained via the Internet	30.0%	31.2%	30.9%	27.6%	30.6%
Senior Tourism programme	0.6%	0.5%	0.2%	0.1%	0.1%
Others	5.6%	4.8%	5.1%	4.8%	4.4%

* Multi-choice question

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

■ 2013Q2 ■ 2014Q2 ■ 2015Q2 ■ 2016Q2



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.