

## Tourist profile by quarter of trip (2024)

### ITALY



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



|   | 2024Q1       | 2024Q2       | 2024Q3       | 2024Q4       | 2024         |
|---|--------------|--------------|--------------|--------------|--------------|
| <b>TOURISTS</b>                                       |              |              |              |              |              |
| <b>Tourist arrivals (FRONTUR) (*)</b>                 | <b>202</b>   | <b>166</b>   | <b>189</b>   | <b>222</b>   | <b>778</b>   |
| <b>Tourist arrivals ≥ 16 years old (EGT) (*)</b>      | <b>182</b>   | <b>147</b>   | <b>171</b>   | <b>204</b>   | <b>704</b>   |
| - book holiday package (*)                            | 35           | 26           | 36           | 33           | <b>130</b>   |
| - do not book holiday package (*)                     | 146          | 121          | 135          | 172          | <b>574</b>   |
| - % tourists who book holiday package                 | 19.5%        | 17.6%        | 21.2%        | 16.0%        | <b>18.5%</b> |
| <b>Children &lt; 16 years old (FRONTUR - EGT) (*)</b> | <b>20</b>    | <b>19</b>    | <b>18</b>    | <b>18</b>    | <b>74</b>    |
| <b>Expenditure per tourist (€)</b>                    |              |              |              |              |              |
| - book holiday package                                | 412          | 209          | 313          | 296          | <b>306</b>   |
| - holiday package                                     | 357          | 184          | 261          | 255          | <b>263</b>   |
| - others  | 55           | 26           | 52           | 41           | <b>44</b>    |
| - do not book holiday package                         | 284          | 228          | 305          | 210          | <b>256</b>   |
| - flight  | 86           | 60           | 91           | 53           | <b>72</b>    |
| - accommodation                                       | 95           | 77           | 98           | 67           | <b>84</b>    |
| - others  | 103          | 91           | 116          | 89           | <b>100</b>   |
| <b>Average lenght of stay</b>                         | <b>12.51</b> | <b>9.52</b>  | <b>11.89</b> | <b>8.51</b>  | <b>10.57</b> |
| <b>Average daily expenditure (€)</b>                  | <b>140.0</b> | <b>131.9</b> | <b>146.5</b> | <b>129.9</b> | <b>137.0</b> |
| <b>Average daily expenditure (without flight)</b>     | <b>98.7</b>  | <b>93.2</b>  | <b>101.4</b> | <b>95.4</b>  | <b>97.2</b>  |
| <b>Average cost of the flight (€)</b>                 | <b>91.4</b>  | <b>62.3</b>  | <b>95.1</b>  | <b>59.0</b>  | <b>77.1</b>  |
| <b>Total turnover ( ≥ 16 years old) (€m)</b>          | <b>237</b>   | <b>145</b>   | <b>244</b>   | <b>197</b>   | <b>823</b>   |
| <b>Turnover without flight ( ≥ 16 years old) (€m)</b> | <b>166</b>   | <b>105</b>   | <b>168</b>   | <b>146</b>   | <b>585</b>   |

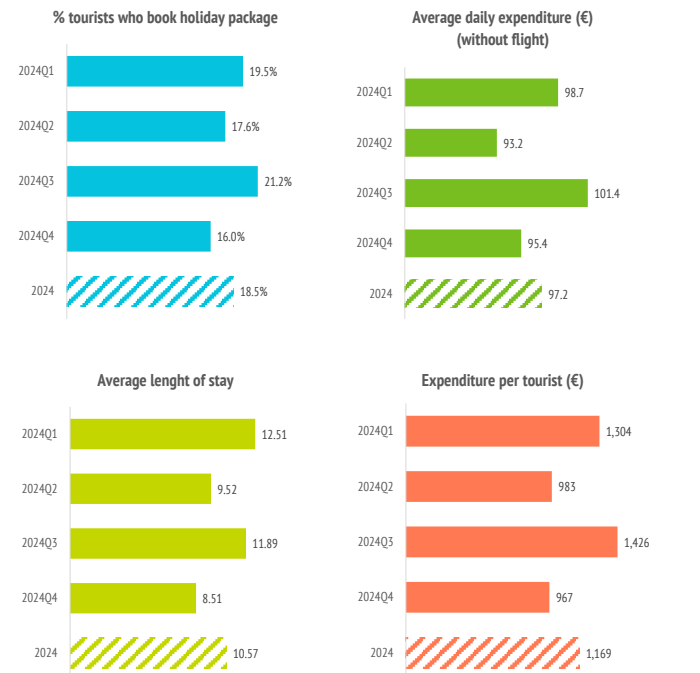
(\*) Thousand of tourists

#### % Tourists whose spending has been greater than €0 in each item

|                                      | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|--------------------------------------|--------|--------|--------|--------|--------------|
| <b>Accommodation:</b>                |        |        |        |        |              |
| - Accommodation                      | 69.3%  | 79.8%  | 82.1%  | 72.0%  | <b>75.4%</b> |
| - Additional accommodation expenses  | 5.8%   | 8.1%   | 5.4%   | 8.1%   | <b>6.9%</b>  |
| <b>Transport:</b>                    |        |        |        |        |              |
| - National/International Transport   | 93.4%  | 95.1%  | 94.6%  | 93.6%  | <b>94.1%</b> |
| - Flights between islands            | 9.5%   | 8.5%   | 4.9%   | 9.9%   | <b>8.3%</b>  |
| - Taxi                               | 25.6%  | 25.9%  | 26.8%  | 29.4%  | <b>27.0%</b> |
| - Car rental                         | 44.4%  | 54.8%  | 56.5%  | 47.8%  | <b>50.5%</b> |
| - Public transport                   | 10.5%  | 11.6%  | 13.4%  | 15.2%  | <b>12.8%</b> |
| <b>Food and drink:</b>               |        |        |        |        |              |
| - Food purchases at supermarkets     | 64.3%  | 61.8%  | 62.3%  | 65.4%  | <b>63.6%</b> |
| - Restaurants                        | 71.3%  | 73.2%  | 72.4%  | 72.1%  | <b>72.2%</b> |
| <b>Leisure:</b>                      |        |        |        |        |              |
| - Organized excursions               | 24.6%  | 35.2%  | 44.7%  | 32.6%  | <b>34.0%</b> |
| - Sport activities                   | 7.8%   | 8.1%   | 5.5%   | 9.4%   | <b>7.8%</b>  |
| - Cultural activities                | 2.3%   | 1.7%   | 0.8%   | 4.3%   | <b>2.4%</b>  |
| - Museums                            | 10.4%  | 6.5%   | 8.4%   | 8.5%   | <b>8.5%</b>  |
| - Theme Parks                        | 10.9%  | 12.1%  | 18.6%  | 14.0%  | <b>13.9%</b> |
| - Discos and pubs                    | 13.2%  | 10.9%  | 16.2%  | 17.8%  | <b>14.8%</b> |
| - Wellness                           | 4.4%   | 5.6%   | 2.9%   | 7.8%   | <b>5.3%</b>  |
| <b>Purchases of goods:</b>           |        |        |        |        |              |
| - Souvenirs                          | 31.2%  | 39.6%  | 45.5%  | 42.6%  | <b>39.7%</b> |
| - Real state                         | 0.0%   | 0.7%   | 0.0%   | 0.0%   | <b>0.1%</b>  |
| - Other expenses                     | 0.1%   | 1.6%   | 1.4%   | 1.3%   | <b>1.1%</b>  |
| <b>Other:</b>                        |        |        |        |        |              |
| - Medical or pharmaceutical expenses | 5.5%   | 5.4%   | 7.5%   | 10.5%  | <b>7.4%</b>  |
| - Other expenses                     | 3.1%   | 2.9%   | 4.6%   | 4.5%   | <b>3.8%</b>  |

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.



#### Average expenditure of tourists whose spending has been greater than €0 in each item

| Expenditure per tourist and trip (€) | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024       |
|--------------------------------------|--------|--------|--------|--------|------------|
| <b>Accommodation:</b>                |        |        |        |        |            |
| - Accommodation                      | 930    | 555    | 673    | 628    | <b>697</b> |
| - Additional accommodation expenses  | 714    | 456    | 599    | 500    | <b>567</b> |
| - Additional accommodation expenses  | 216    | 99     | 74     | 128    | <b>129</b> |
| <b>Transport:</b>                    |        |        |        |        |            |
| - National/International Transport   | 742    | 533    | 836    | 564    | <b>673</b> |
| - National/International Transport   | 415    | 288    | 467    | 270    | <b>359</b> |
| - Flights between islands            | 77     | 52     | 60     | 108    | <b>80</b>  |
| - Taxi                               | 104    | 67     | 109    | 60     | <b>84</b>  |
| - Car rental                         | 124    | 102    | 175    | 103    | <b>127</b> |
| - Public transport                   | 22     | 25     | 24     | 22     | <b>23</b>  |
| <b>Food and drink:</b>               |        |        |        |        |            |
| - Food purchases at supermarkets     | 362    | 257    | 330    | 247    | <b>299</b> |
| - Food purchases at supermarkets     | 154    | 98     | 126    | 98     | <b>119</b> |
| - Restaurants                        | 208    | 158    | 205    | 150    | <b>180</b> |
| <b>Leisure:</b>                      |        |        |        |        |            |
| - Organized excursions               | 506    | 470    | 454    | 477    | <b>480</b> |
| - Organized excursions               | 65     | 71     | 92     | 80     | <b>79</b>  |
| - Sport activities                   | 73     | 83     | 108    | 69     | <b>80</b>  |
| - Cultural activities                | 22     | 61     | 48     | 62     | <b>50</b>  |
| - Museums                            | 23     | 36     | 28     | 57     | <b>36</b>  |
| - Theme Parks                        | 49     | 78     | 71     | 56     | <b>63</b>  |
| - Discos and pubs                    | 74     | 74     | 71     | 66     | <b>71</b>  |
| - Wellness                           | 200    | 68     | 36     | 87     | <b>100</b> |
| <b>Purchases of goods:</b>           |        |        |        |        |            |
| - Souvenirs                          | 85     | 193    | 130    | 117    | <b>200</b> |
| - Souvenirs                          | 55     | 53     | 88     | 43     | <b>60</b>  |
| - Real state                         | 0      | 83     | 0      | 0      | <b>83</b>  |
| - Other expenses                     | 30     | 57     | 42     | 74     | <b>57</b>  |
| <b>Other:</b>                        |        |        |        |        |            |
| - Medical or pharmaceutical expenses | 134    | 76     | 175    | 68     | <b>111</b> |
| - Medical or pharmaceutical expenses | 55     | 13     | 89     | 27     | <b>46</b>  |
| - Other expenses                     | 79     | 63     | 86     | 41     | <b>66</b>  |

## Tourist profile by quarter of trip (2024)

### ITALY



#### What is the main purpose of their trip?

|                            | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|----------------------------|--------|--------|--------|--------|--------------|
| Holiday, leisure           | 77.4%  | 84.7%  | 89.7%  | 80.0%  | <b>82.7%</b> |
| Visiting family or friends | 15.1%  | 8.9%   | 9.4%   | 17.0%  | <b>13.0%</b> |
| Business and work          | 1.1%   | 4.4%   | 0.4%   | 0.5%   | <b>1.4%</b>  |
| Education and training     | 0.8%   | 0.2%   | 0.0%   | 0.9%   | <b>0.5%</b>  |
| Sports training            | 2.0%   | 1.3%   | 0.0%   | 1.2%   | <b>1.1%</b>  |
| Health or medical care     | 0.2%   | 0.0%   | 0.2%   | 0.0%   | <b>0.1%</b>  |
| Fairs and congresses       | 0.7%   | 0.5%   | 0.3%   | 0.0%   | <b>0.4%</b>  |
| Others                     | 2.7%   | 0.0%   | 0.0%   | 0.4%   | <b>0.8%</b>  |

#### What is the main motivation for their holidays?

|                         | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-------------------------|--------|--------|--------|--------|--------------|
| Rest                    | 51.3%  | 40.1%  | 38.5%  | 41.4%  | <b>43.0%</b> |
| Enjoy family time       | 16.1%  | 12.4%  | 11.5%  | 13.6%  | <b>13.5%</b> |
| Have fun                | 7.5%   | 5.4%   | 12.0%  | 8.1%   | <b>8.4%</b>  |
| Explore the destination | 21.1%  | 39.8%  | 36.5%  | 35.0%  | <b>32.8%</b> |
| Practice their hobbies  | 2.4%   | 2.1%   | 0.2%   | 1.3%   | <b>1.5%</b>  |
| Other reasons           | 1.6%   | 0.1%   | 1.2%   | 0.5%   | <b>0.9%</b>  |

#### Where did they spend their main holiday last year? \*

|                      | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|----------------------|--------|--------|--------|--------|--------------|
| Didn't have holidays | 8.8%   | 11.5%  | 14.0%  | 10.3%  | <b>11.3%</b> |
| Canary Islands       | 17.8%  | 17.3%  | 20.3%  | 21.9%  | <b>19.5%</b> |
| Other destination    | 73.4%  | 71.3%  | 65.7%  | 67.8%  | <b>69.2%</b> |
| - Balearic Islands   | 5.3%   | 4.5%   | 3.7%   | 5.0%   | <b>4.6%</b>  |
| - Rest of Spain      | 11.4%  | 6.9%   | 8.2%   | 8.0%   | <b>8.6%</b>  |
| - Italy              | 18.3%  | 29.0%  | 21.0%  | 20.6%  | <b>22.0%</b> |
| - France             | 4.9%   | 3.8%   | 4.2%   | 4.2%   | <b>4.3%</b>  |
| - Turkey             | 0.9%   | 0.7%   | 1.2%   | 2.1%   | <b>1.3%</b>  |
| - Greece             | 6.7%   | 10.0%  | 8.3%   | 7.0%   | <b>8.0%</b>  |
| - Portugal           | 4.4%   | 3.2%   | 2.5%   | 3.3%   | <b>3.3%</b>  |
| - Croatia            | 3.5%   | 1.2%   | 1.7%   | 1.6%   | <b>1.9%</b>  |
| - Egypt              | 3.7%   | 2.2%   | 2.9%   | 1.8%   | <b>2.6%</b>  |
| - Tunisia            | 0.6%   | 0.5%   | 0.7%   | 0.5%   | <b>0.6%</b>  |
| - Morocco            | 2.7%   | 1.6%   | 1.5%   | 1.4%   | <b>1.8%</b>  |
| - Others             | 11.0%  | 7.9%   | 10.1%  | 12.4%  | <b>10.4%</b> |

\* Percentage of valid answers

#### What other destinations did they consider for this trip? \*

|   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|---|--------|--------|--------|--------|--------------|
| None (I was clear about "this Canary Island") | 39.6%  | 35.8%  | 25.0%  | 37.5%  | <b>34.0%</b> |
| Canary Islands (other island)                 | 30.8%  | 28.9%  | 25.6%  | 32.7%  | <b>29.5%</b> |
| Other destination                             | 29.5%  | 35.3%  | 49.4%  | 29.7%  | <b>36.5%</b> |
| - Balearic Islands                            | 3.3%   | 4.4%   | 5.5%   | 2.6%   | <b>4.0%</b>  |
| - Rest of Spain                               | 5.7%   | 8.2%   | 11.7%  | 8.6%   | <b>8.7%</b>  |
| - Italy                                       | 4.1%   | 4.6%   | 6.7%   | 4.0%   | <b>4.9%</b>  |
| - France                                      | 1.2%   | 1.4%   | 0.9%   | 0.9%   | <b>1.1%</b>  |
| - Turkey                                      | 0.8%   | 0.7%   | 2.0%   | 0.9%   | <b>1.2%</b>  |
| - Greece                                      | 0.9%   | 4.0%   | 10.3%  | 2.8%   | <b>4.8%</b>  |
| - Portugal                                    | 5.8%   | 4.7%   | 4.9%   | 3.1%   | <b>4.6%</b>  |
| - Croatia                                     | 0.0%   | 0.5%   | 2.5%   | 1.1%   | <b>1.1%</b>  |
| - Egypt                                       | 2.7%   | 4.0%   | 2.6%   | 4.9%   | <b>3.6%</b>  |
| - Others                                      | 4.9%   | 2.9%   | 2.3%   | 0.8%   | <b>2.6%</b>  |

\* Percentage of valid answers

#### Importance of each factor in the destination choice



|                      | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|----------------------|--------|--------|--------|--------|--------------|
| Climate              | 79.4%  | 74.2%  | 68.6%  | 81.0%  | <b>76.1%</b> |
| Landscapes           | 55.3%  | 63.4%  | 62.7%  | 52.1%  | <b>57.9%</b> |
| Environment          | 53.8%  | 61.7%  | 60.2%  | 55.9%  | <b>57.6%</b> |
| Sea                  | 52.3%  | 51.6%  | 52.2%  | 51.3%  | <b>51.8%</b> |
| Tranquility          | 52.6%  | 49.3%  | 48.2%  | 52.1%  | <b>50.7%</b> |
| Beaches              | 50.4%  | 48.8%  | 53.2%  | 46.0%  | <b>49.5%</b> |
| Safety               | 40.5%  | 45.2%  | 42.5%  | 40.6%  | <b>42.0%</b> |
| European belonging   | 41.0%  | 41.8%  | 33.4%  | 40.2%  | <b>39.0%</b> |
| Price                | 26.9%  | 36.2%  | 33.9%  | 30.6%  | <b>31.6%</b> |
| Effortless trip      | 21.7%  | 39.1%  | 32.3%  | 34.2%  | <b>31.5%</b> |
| Authenticity         | 25.6%  | 35.2%  | 29.5%  | 27.7%  | <b>29.1%</b> |
| Accommodation supply | 26.0%  | 33.0%  | 29.1%  | 26.3%  | <b>28.3%</b> |
| Fun possibilities    | 18.8%  | 24.5%  | 32.3%  | 23.1%  | <b>24.5%</b> |
| Hiking trail network | 16.9%  | 25.3%  | 24.9%  | 21.5%  | <b>21.9%</b> |
| Gastronomy           | 13.7%  | 24.5%  | 22.3%  | 20.5%  | <b>20.0%</b> |
| Nightlife            | 13.3%  | 18.6%  | 24.0%  | 11.6%  | <b>16.5%</b> |
| Exoticism            | 13.4%  | 21.0%  | 16.3%  | 11.8%  | <b>15.2%</b> |
| Shopping             | 8.6%   | 15.2%  | 16.6%  | 11.4%  | <b>12.7%</b> |
| Historical heritage  | 7.6%   | 14.5%  | 12.0%  | 10.9%  | <b>11.1%</b> |
| Culture              | 7.3%   | 13.9%  | 10.6%  | 10.8%  | <b>10.5%</b> |

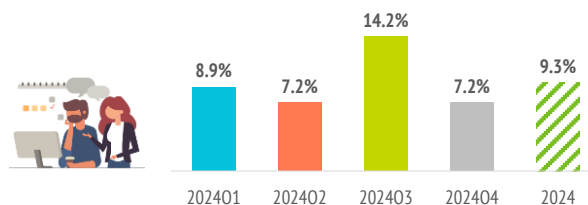
Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important" % of tourists who indicate that the factor is "very important" in their choice.

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



|                        | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|------------------------|--------|--------|--------|--------|--------------|
| The same day           | 0.1%   | 1.1%   | 0.7%   | 1.7%   | <b>0.9%</b>  |
| Between 1 and 30 days  | 24.0%  | 21.7%  | 19.2%  | 23.3%  | <b>22.2%</b> |
| Between 1 and 2 months | 34.8%  | 35.6%  | 22.2%  | 30.5%  | <b>30.7%</b> |
| Between 3 and 6 months | 32.3%  | 34.4%  | 43.6%  | 37.2%  | <b>36.9%</b> |
| More than 6 months     | 8.9%   | 7.2%   | 14.2%  | 7.2%   | <b>9.3%</b>  |

#### % TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



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



|                                       | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|---------------------------------------|--------|--------|--------|--------|--------------|
| Previous visits to the Canary Islands | 38.4%  | 26.4%  | 20.7%  | 31.4%  | <b>29.5%</b> |
| Friends or relatives                  | 41.0%  | 35.7%  | 35.8%  | 38.0%  | <b>37.8%</b> |
| Internet or social media              | 44.6%  | 55.2%  | 62.0%  | 47.8%  | <b>52.0%</b> |
| Mass Media                            | 0.7%   | 2.0%   | 1.1%   | 0.9%   | <b>1.1%</b>  |
| Travel guides and magazines           | 3.9%   | 5.9%   | 7.0%   | 5.1%   | <b>5.4%</b>  |
| Travel Blogs or Forums                | 5.5%   | 11.1%  | 7.5%   | 9.4%   | <b>8.3%</b>  |
| Travel TV Channels                    | 1.2%   | 0.1%   | 0.6%   | 0.4%   | <b>0.6%</b>  |
| Tour Operator or Travel Agency        | 11.4%  | 12.4%  | 14.8%  | 9.5%   | <b>11.9%</b> |
| Public administrations or similar     | 0.4%   | 1.4%   | 0.9%   | 0.0%   | <b>0.6%</b>  |
| Others                                | 1.5%   | 2.4%   | 3.2%   | 2.5%   | <b>2.4%</b>  |

\* Multi-choice question

## Tourist profile by quarter of trip (2024)

### ITALY



#### With whom did they book their flight and accommodation?

|                                   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-----------------------------------|--------|--------|--------|--------|--------------|
| <b>Flight</b>                     |        |        |        |        |              |
| - Directly with the airline       | 72.3%  | 72.5%  | 68.4%  | 77.8%  | <b>73.0%</b> |
| - Tour Operator or Travel Agency  | 27.7%  | 27.5%  | 31.6%  | 22.2%  | <b>27.0%</b> |
| <b>Accommodation</b>              |        |        |        |        |              |
| - Directly with the accommodation | 61.8%  | 59.2%  | 55.0%  | 64.0%  | <b>60.1%</b> |
| - Tour Operator or Travel Agency  | 38.2%  | 40.8%  | 45.0%  | 36.0%  | <b>39.9%</b> |

#### Where does the flight come from?

|                  | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|------------------|--------|--------|--------|--------|--------------|
| Italy            | 83.8%  | 83.3%  | 80.2%  | 89.2%  | <b>84.4%</b> |
| Spanish Mainland | 11.3%  | 13.1%  | 14.4%  | 9.2%   | <b>11.8%</b> |
| Germany          | 0.7%   | 0.4%   | 2.2%   | 0.0%   | <b>0.8%</b>  |
| United Kingdom   | 0.0%   | 2.6%   | 0.8%   | 0.0%   | <b>0.7%</b>  |
| Slovakia         | 2.7%   | 0.0%   | 0.0%   | 0.0%   | <b>0.7%</b>  |
| Switzerland      | 0.0%   | 0.5%   | 1.1%   | 0.0%   | <b>0.4%</b>  |
| Others           | 1.5%   | 0.0%   | 1.3%   | 1.6%   | <b>1.2%</b>  |

#### Where do they stay?

|   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|---|--------|--------|--------|--------|--------------|
| 1-2-3* Hotel                            | 6.9%   | 10.4%  | 9.9%   | 6.5%   | <b>8.3%</b>  |
| 4* Hotel                                | 18.5%  | 24.3%  | 22.7%  | 17.8%  | <b>20.5%</b> |
| 5* Hotel / 5* Luxury Hotel              | 2.6%   | 4.5%   | 3.8%   | 1.8%   | <b>3.1%</b>  |
| Aparthotel / Tourist Villa              | 15.8%  | 11.5%  | 18.0%  | 13.8%  | <b>14.9%</b> |
| House/room rented in a private dwelling | 27.7%  | 33.1%  | 30.3%  | 36.1%  | <b>31.9%</b> |
| Private accommodation (1)               | 23.3%  | 12.7%  | 11.9%  | 16.7%  | <b>16.4%</b> |
| Others (Cottage, cruise, camping,...)   | 5.2%   | 3.5%   | 3.3%   | 7.3%   | <b>5.0%</b>  |

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

#### What do they book?

|                   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-------------------|--------|--------|--------|--------|--------------|
| Room only         | 59.2%  | 57.1%  | 56.9%  | 66.1%  | <b>60.1%</b> |
| Bed and Breakfast | 5.7%   | 11.5%  | 8.4%   | 8.2%   | <b>8.4%</b>  |
| Half board        | 12.4%  | 11.9%  | 13.1%  | 7.3%   | <b>11.0%</b> |
| Full board        | 7.2%   | 4.1%   | 5.6%   | 7.3%   | <b>6.1%</b>  |
| All inclusive     | 15.5%  | 15.4%  | 16.1%  | 11.0%  | <b>14.4%</b> |

#### Tourist tax (Data available from Q2 2024)

Have they visited any holiday destination in the last five years where they were charged a tourist tax?

|              | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|--------------|--------|--------|--------|--------|--------------|
| Yes          | --     | 62.5%  | 57.9%  | 61.9%  | <b>60.7%</b> |
| No           | --     | 26.8%  | 26.0%  | 24.8%  | <b>25.8%</b> |
| Not remember | --     | 10.7%  | 16.2%  | 13.2%  | <b>13.5%</b> |

Do they exclude destinations with tourist tax?

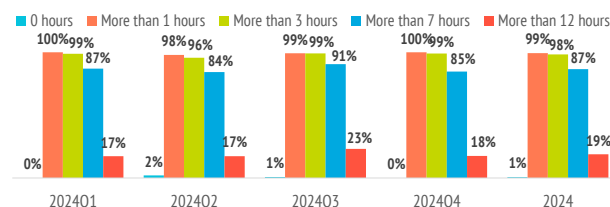
|     | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-----|--------|--------|--------|--------|--------------|
| Yes | --     | 15.7%  | 18.0%  | 18.0%  | <b>17.3%</b> |
| No  | --     | 84.3%  | 82.0%  | 82.0%  | <b>82.7%</b> |

How much would they be willing to pay?

|                   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-------------------|--------|--------|--------|--------|--------------|
| Up to 1 euro      | --     | 43.5%  | 51.9%  | 49.0%  | <b>48.4%</b> |
| Up to 2 euros     | --     | 29.9%  | 28.6%  | 29.0%  | <b>29.1%</b> |
| Up to 3 euros     | --     | 18.8%  | 15.2%  | 17.7%  | <b>17.2%</b> |
| More than 3 euros | --     | 7.8%   | 4.3%   | 4.3%   | <b>5.3%</b>  |

#### Activities in the Canary Islands

|                             | 2024Q1      | 2024Q2      | 2024Q3      | 2024Q4      | 2024         |
|-----------------------------|-------------|-------------|-------------|-------------|--------------|
| <b>Outdoor time per day</b> |             |             |             |             |              |
| 0 hours                     | 0.0%        | 2.1%        | 0.8%        | 0.0%        | <b>0.6%</b>  |
| 1 - 2 hours                 | 1.1%        | 2.3%        | 0.2%        | 1.0%        | <b>1.1%</b>  |
| 3 - 6 hours                 | 11.8%       | 11.3%       | 8.6%        | 14.3%       | <b>11.7%</b> |
| 7 - 12 hours                | 69.7%       | 66.9%       | 67.3%       | 67.1%       | <b>67.8%</b> |
| More than 12 hours          | 17.3%       | 17.4%       | 23.2%       | 17.6%       | <b>18.8%</b> |
| <b>Outdoor time per day</b> | <b>10.1</b> | <b>10.0</b> | <b>10.6</b> | <b>10.1</b> | <b>10.2</b>  |



|   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|---|--------|--------|--------|--------|--------------|
| <b>Activities in the Canary Islands</b> |        |        |        |        |              |
| Beach                                   | 77.0%  | 83.5%  | 86.8%  | 85.0%  | <b>83.1%</b> |
| Walk, wander                            | 72.0%  | 74.8%  | 70.6%  | 73.3%  | <b>72.6%</b> |
| Explore the island on their own         | 55.2%  | 66.8%  | 65.0%  | 61.5%  | <b>61.8%</b> |
| Swimming pool, hotel facilities         | 26.4%  | 46.0%  | 49.4%  | 37.8%  | <b>39.4%</b> |
| Taste Canarian gastronomy               | 23.5%  | 28.5%  | 27.1%  | 30.1%  | <b>27.3%</b> |
| Organized excursions                    | 14.1%  | 25.0%  | 34.8%  | 20.0%  | <b>23.1%</b> |
| Hiking                                  | 13.7%  | 21.2%  | 18.2%  | 18.9%  | <b>17.9%</b> |
| Theme parks                             | 10.6%  | 12.9%  | 24.9%  | 16.0%  | <b>16.1%</b> |
| Nightlife / concerts / shows            | 8.9%   | 16.9%  | 20.1%  | 17.9%  | <b>15.9%</b> |
| Other Nature Activities                 | 13.3%  | 13.1%  | 16.0%  | 16.4%  | <b>14.8%</b> |
| Sea excursions / whale watching         | 6.0%   | 11.3%  | 24.5%  | 11.5%  | <b>13.2%</b> |
| Museums / exhibitions                   | 13.1%  | 10.3%  | 16.6%  | 12.1%  | <b>13.1%</b> |
| Wineries / markets / popular festivals  | 10.2%  | 12.1%  | 14.9%  | 13.2%  | <b>12.6%</b> |
| Surf                                    | 6.7%   | 9.1%   | 5.8%   | 9.0%   | <b>7.7%</b>  |
| Running                                 | 6.1%   | 5.5%   | 6.9%   | 7.5%   | <b>6.6%</b>  |
| Practice other sports                   | 5.9%   | 4.4%   | 7.3%   | 3.4%   | <b>5.2%</b>  |
| Beauty and health treatments            | 4.9%   | 5.4%   | 4.2%   | 5.5%   | <b>5.0%</b>  |
| Swim                                    | 5.3%   | 4.7%   | 5.7%   | 3.5%   | <b>4.7%</b>  |
| Astronomical observation                | 2.3%   | 6.1%   | 5.3%   | 3.1%   | <b>4.1%</b>  |
| Cycling / Mountain bike                 | 2.9%   | 2.2%   | 1.4%   | 2.7%   | <b>2.3%</b>  |
| Scuba Diving                            | 1.7%   | 1.8%   | 3.7%   | 1.9%   | <b>2.3%</b>  |
| Windsurf / Kitesurf                     | 1.2%   | 2.6%   | 2.1%   | 1.1%   | <b>1.7%</b>  |
| Golf                                    | 0.9%   | 1.6%   | 1.8%   | 1.5%   | <b>1.4%</b>  |

\* Multi-choice question

Would they be willing to pay a tourist tax for each day of accommodation in the Canary Islands?

|                                   | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024         |
|-----------------------------------|--------|--------|--------|--------|--------------|
| Yes                               | --     | 54.9%  | 42.2%  | 48.1%  | <b>35.7%</b> |
| - For any purpose                 | --     | 7.5%   | 4.2%   | 5.4%   | <b>4.2%</b>  |
| - Improve living conditions       | --     | 4.8%   | 4.4%   | 3.8%   | <b>3.2%</b>  |
| - Improve economic development    | --     | 4.0%   | 3.6%   | 1.6%   | <b>2.2%</b>  |
| - Improve the environment         | --     | 29.3%  | 23.7%  | 28.0%  | <b>20.0%</b> |
| - Improve the tourist environment | --     | 4.3%   | 2.2%   | 5.2%   | <b>2.9%</b>  |
| - Other purposes                  | --     | 5.0%   | 4.1%   | 4.0%   | <b>3.2%</b>  |
| Not sure                          | --     | 24.6%  | 37.0%  | 31.0%  | <b>23.1%</b> |
| No                                | --     | 20.4%  | 20.8%  | 21.0%  | <b>15.4%</b> |

# Tourist profile by quarter of trip (2024)

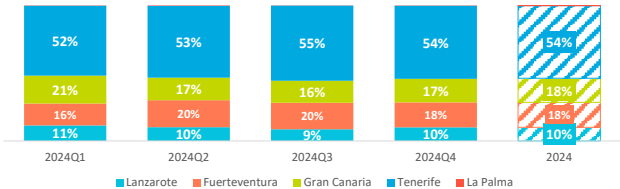
## ITALY



### Which island do they choose?



| Tourists (≥ 16 year old) | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4  | 2024    |
|--------------------------|--------|--------|--------|---------|---------|
| Lanzarote                | 20,731 | 14,869 | 14,651 | 20,428  | 70,679  |
| Fuerteventura            | 29,355 | 29,274 | 33,377 | 37,576  | 129,582 |
| Gran Canaria             | 37,303 | 24,523 | 27,710 | 35,510  | 125,046 |
| Tenerife                 | 93,608 | 78,021 | 94,744 | 110,128 | 376,501 |
| La Palma                 | 448    | 470    | 287    | 555     | 1,760   |



### How many are loyal to the Canary Islands?



|  | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|--|--------|--------|--------|--------|-------|
| Repeat tourists                            | 59.4%  | 48.1%  | 44.2%  | 54.2%  | 51.8% |
| At least 10 previous visits                | 16.7%  | 10.2%  | 6.1%   | 7.3%   | 10.0% |
| Repeat tourists (last 5 years)             | 55.5%  | 40.1%  | 38.0%  | 52.0%  | 47.0% |
| Repeat tourists (last 5 years) (5 or more) | 16.0%  | 10.6%  | 6.0%   | 12.3%  | 11.4% |

### Who are they?



|                                      | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|--------------------------------------|--------|--------|--------|--------|-------|
| <b>Gender</b>                        |        |        |        |        |       |
| Men                                  | 54.9%  | 43.7%  | 53.1%  | 53.9%  | 51.8% |
| Women                                | 45.1%  | 56.3%  | 46.9%  | 46.1%  | 48.2% |
| <b>Age</b>                           |        |        |        |        |       |
| Average age                          | 44.7   | 40.3   | 37.2   | 41.5   | 41.0  |
| Standard deviation                   | 17.0   | 15.4   | 15.0   | 17.0   | 16.4  |
| <b>Age range</b>                     |        |        |        |        |       |
| 16 - 24 years old                    | 11.0%  | 15.5%  | 23.5%  | 20.0%  | 17.6% |
| 25 - 30 years old                    | 15.6%  | 16.7%  | 19.7%  | 15.1%  | 16.7% |
| 31 - 45 years old                    | 28.6%  | 34.8%  | 29.7%  | 26.8%  | 29.6% |
| 46 - 60 years old                    | 23.7%  | 19.1%  | 17.3%  | 20.9%  | 20.4% |
| Over 60 years old                    | 21.1%  | 13.9%  | 9.7%   | 17.3%  | 15.7% |
| <b>Occupation</b>                    |        |        |        |        |       |
| Salaried worker                      | 41.2%  | 45.8%  | 52.0%  | 41.1%  | 44.7% |
| Self-employed                        | 21.3%  | 18.7%  | 21.0%  | 28.8%  | 22.9% |
| Unemployed                           | 3.9%   | 3.1%   | 1.5%   | 5.5%   | 3.6%  |
| Business owner                       | 8.3%   | 10.8%  | 7.3%   | 6.0%   | 7.9%  |
| Student                              | 6.7%   | 7.0%   | 10.8%  | 8.9%   | 8.4%  |
| Retired                              | 18.1%  | 13.2%  | 5.7%   | 7.3%   | 10.9% |
| Unpaid domestic work                 | 0.2%   | 0.5%   | 1.5%   | 2.3%   | 1.2%  |
| Others                               | 0.3%   | 0.8%   | 0.4%   | 0.1%   | 0.4%  |
| <b>Annual household income level</b> |        |        |        |        |       |
| Less than €25,000                    | 16.6%  | 23.5%  | 31.7%  | 22.7%  | 23.5% |
| €25,000 - €49,999                    | 49.3%  | 52.1%  | 45.4%  | 51.7%  | 49.7% |
| €50,000 - €74,999                    | 16.7%  | 17.9%  | 14.0%  | 15.4%  | 15.9% |
| More than €74,999                    | 17.5%  | 6.5%   | 8.8%   | 10.1%  | 10.9% |
| <b>Education level</b>               |        |        |        |        |       |
| No studies                           | 0.1%   | 0.0%   | 0.7%   | 0.9%   | 0.5%  |
| Primary education                    | 1.3%   | 1.2%   | 1.6%   | 3.1%   | 1.9%  |
| Secondary education                  | 21.3%  | 13.1%  | 8.3%   | 10.0%  | 13.2% |
| Higher education                     | 77.3%  | 85.7%  | 89.4%  | 85.9%  | 84.5% |

| Share by islands | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|------------------|--------|--------|--------|--------|-------|
| Lanzarote        | 11.4%  | 10.1%  | 8.6%   | 10.0%  | 10.0% |
| Fuerteventura    | 16.2%  | 19.9%  | 19.5%  | 18.4%  | 18.4% |
| Gran Canaria     | 20.6%  | 16.7%  | 16.2%  | 17.4%  | 17.8% |
| Tenerife         | 51.6%  | 53.0%  | 55.5%  | 53.9%  | 53.5% |
| La Palma         | 0.2%   | 0.3%   | 0.2%   | 0.3%   | 0.3%  |

### How many islands do they visit during their trip?



|                       | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|-----------------------|--------|--------|--------|--------|-------|
| One island            | 85.5%  | 89.2%  | 92.2%  | 87.2%  | 88.4% |
| Two islands           | 12.9%  | 9.6%   | 6.8%   | 11.2%  | 10.2% |
| Three or more islands | 1.6%   | 1.2%   | 1.0%   | 1.6%   | 1.4%  |

### How do they rate the Canary Islands?



| Satisfaction (scale 0-10) | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024 |
|---------------------------|--------|--------|--------|--------|------|
| Average rating            | 8.76   | 8.66   | 8.48   | 8.55   | 8.61 |

| Experience in the Canary Islands    | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|-------------------------------------|--------|--------|--------|--------|-------|
| Worse or much worse than expected   | 3.7%   | 2.3%   | 5.6%   | 3.9%   | 3.9%  |
| Lived up to expectations            | 44.2%  | 49.1%  | 52.8%  | 44.6%  | 47.4% |
| Better or much better than expected | 52.1%  | 48.6%  | 41.6%  | 51.5%  | 48.6% |

| Future intentions (scale 1-10)        | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024 |
|---------------------------------------|--------|--------|--------|--------|------|
| Return to the Canary Islands          | 9.03   | 8.69   | 8.34   | 8.64   | 8.68 |
| Recommend visiting the Canary Islands | 9.10   | 8.83   | 8.68   | 8.77   | 8.85 |

### Who do they come with?



|                                     | 2024Q1 | 2024Q2 | 2024Q3 | 2024Q4 | 2024  |
|-------------------------------------|--------|--------|--------|--------|-------|
| Unaccompanied                       | 17.4%  | 12.3%  | 9.0%   | 13.5%  | 13.2% |
| Only with partner                   | 43.0%  | 42.1%  | 52.8%  | 47.2%  | 46.4% |
| Only with children (< 13 years old) | 5.9%   | 3.8%   | 3.4%   | 3.0%   | 4.0%  |
| Partner + children (< 13 years old) | 3.5%   | 3.7%   | 3.9%   | 2.0%   | 3.2%  |
| Other relatives                     | 5.1%   | 8.3%   | 5.3%   | 6.2%   | 6.1%  |
| Friends                             | 12.1%  | 14.1%  | 13.1%  | 12.8%  | 12.9% |
| Work colleagues                     | 1.1%   | 0.5%   | 0.0%   | 0.3%   | 0.5%  |
| Organized trip                      | 0.2%   | 0.3%   | 0.3%   | 0.2%   | 0.2%  |
| Other combinations (2)              | 11.7%  | 15.0%  | 12.1%  | 14.8%  | 13.4% |

(2) Combination of some of the groups previously analyzed

| Tourists with children             | 13.5% | 11.1% | 9.8%  | 7.1%  | 10.3% |
|------------------------------------|-------|-------|-------|-------|-------|
| - Between 0 and 2 years old        | 4.9%  | 0.6%  | 0.7%  | 0.0%  | 1.6%  |
| - Between 3 and 12 years old       | 7.8%  | 9.9%  | 8.1%  | 7.1%  | 8.1%  |
| - Between 0 - 2 and 3-12 years old | 0.8%  | 0.7%  | 1.1%  | 0.0%  | 0.6%  |
| Tourists without children          | 86.5% | 88.9% | 90.2% | 92.9% | 89.7% |
| <b>Group composition:</b>          |       |       |       |       |       |
| - 1 person                         | 22.1% | 14.6% | 13.2% | 17.0% | 16.9% |
| - 2 people                         | 45.1% | 61.5% | 58.8% | 51.6% | 53.7% |
| - 3 people                         | 15.5% | 9.6%  | 12.3% | 13.0% | 12.8% |
| - 4 or 5 people                    | 11.7% | 11.8% | 15.1% | 16.2% | 13.8% |
| - 6 or more people                 | 5.6%  | 2.5%  | 0.6%  | 2.2%  | 2.8%  |
| Average group size:                | 2.44  | 2.35  | 2.35  | 2.44  | 2.40  |

\*People who share the main expenses of the trip

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.