

Tourist profile. Historical data (2019 - 2025)

ITALY: First Quarter



How many are they and how much do they spend?

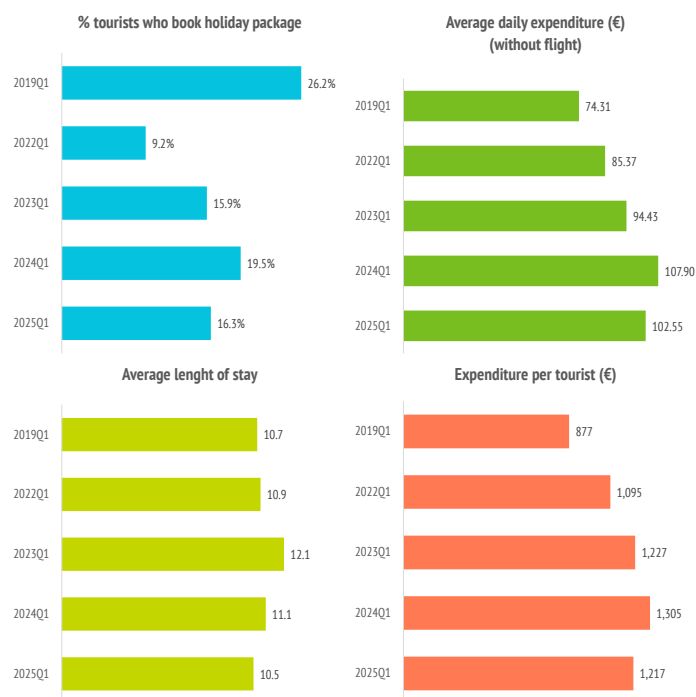


	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
TOURISTS					
Tourist arrivals (FRONTUR) (*)	134	123	163	202	234
Tourist arrivals ≥ 16 years old (EGT) (*)	123	112	146	182	209
- book holiday package (*)	32	10	23	35	34
- do not book holiday package (*)	91	102	123	146	175
- % tourists who book holiday package	26.2%	9.2%	15.9%	19.5%	16.3%
Children < 16 years old (FRONTUR - EGT) (*)	11	11	16	20	25
Expenditure per tourist (€)	877	1,095	1,227	1,305	1,217
- book holiday package	939	1,399	1,475	1,629	1,553
- holiday package	796	1,174	1,247	1,398	1,302
- others	143	225	228	230	251
- do not book holiday package	855	1,065	1,180	1,226	1,152
- flight	225	319	331	345	332
- accommodation	276	350	361	435	393
- others	354	396	488	447	427
Average lenght of stay	10.7	10.9	12.1	11.1	10.5
- Median	7.0	7.0	7.0	7.0	7.0
Average daily expenditure (€)	102.94	115.20	135.80	150.98	144.10
- Median	89.71	104.93	146.43	147.00	151.44
Average daily expenditure (without flight)	74.31	85.37	94.43	107.90	102.55
- Median	67.12	77.25	100.21	111.11	113.00
Average cost of the flight (€)	235.50	320.82	351.72	367.97	350.70
Total turnover (≥ 16 years old) (€m)	108	123	180	237	254
Turnover without flight (≥ 16 years old) (€m)	79	87	128	170	181

(*) Thousands of tourists

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

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Accommodation:					
- Accommodation	70.6%	72.5%	72.1%	75.6%	76.0%
- Additional accommodation expenses	9.5%	6.2%	6.5%	6.6%	6.8%
Transport:					
- National/International Transport	93.4%	93.5%	95.0%	93.4%	92.1%
- Flights between islands	7.4%	5.1%	8.3%	9.1%	6.6%
- Taxi	22.5%	21.7%	24.6%	28.3%	22.7%
- Car rental	31.9%	48.5%	51.2%	47.6%	54.5%
- Public transport	7.7%	12.5%	12.0%	10.9%	14.5%
Food and drink:					
- Food purchases at supermarkets	55.6%	69.1%	63.3%	61.6%	60.9%
- Restaurants	61.8%	72.5%	69.9%	71.0%	76.7%
Leisure:					
- Organized excursions	13.5%	15.3%	24.0%	25.2%	29.7%
- Sport activities	4.1%	5.4%	9.8%	7.4%	6.5%
- Cultural activities	1.6%	2.2%	3.2%	1.7%	2.5%
- Museums	4.5%	3.9%	6.1%	10.0%	6.8%
- Theme Parks	3.0%	6.8%	10.3%	12.0%	9.4%
- Discos and pubs	8.5%	5.9%	12.1%	12.3%	11.9%
- Wellness	2.4%	2.1%	3.6%	3.3%	5.4%
Purchases of goods:					
- Souvenirs	36.2%	33.0%	38.1%	33.2%	39.3%
- Other expenses	0.6%	1.3%	0.0%	0.3%	0.9%
Other:					
- Medical or pharmaceutical expenses	4.2%	8.3%	8.6%	5.2%	5.1%
- Other expenses	1.9%	4.6%	3.4%	3.4%	3.7%



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

Expenditure per tourist and trip (€)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Accommodation:					
- Accommodation	642	664	788	924	745
- Additional accommodation expenses	478	522	576	676	595
- Additional accommodation expenses	164	142	212	248	150
Transport:					
- National/International Transport	537	904	825	725	860
- National/International Transport	252	343	370	394	381
- Flights between islands	110	112	186	85	243
- Taxi	50	288	58	86	76
- Car rental	90	130	145	139	140
- Public transport	35	31	66	21	20
Food and drink:					
- Food purchases at supermarkets	290	271	357	352	286
- Food purchases at supermarkets	137	101	163	149	114
- Restaurants	153	171	193	202	173
Leisure:					
- Organized excursions	375	433	512	505	549
- Organized excursions	66	71	100	73	78
- Sport activities	73	82	100	84	104
- Cultural activities	30	68	41	21	31
- Museums	26	29	37	28	87
- Theme Parks	51	64	56	47	63
- Discos and pubs	64	63	102	73	68
- Wellness	66	56	77	178	119
Purchases of goods:					
- Souvenirs	114	279	84	85	131
- Souvenirs	95	73	84	55	69
- Other expenses	19	206	0	30	63
Other:					
- Medical or pharmaceutical expenses	297	77	94	159	127
- Medical or pharmaceutical expenses	196	32	35	81	21
- Other expenses	101	45	58	79	106

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.

Tourist profile. Historical data (2019 - 2025)

ITALY: First Quarter



What is the main purpose of their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Holiday, leisure	75.4%	82.4%	79.8%	82.6%	84.9%
Visiting family or friends	17.0%	13.6%	14.4%	10.4%	11.5%
Business and work	5.7%	2.0%	2.1%	0.7%	0.7%
Education and training	0.0%	0.0%	0.0%	0.7%	1.5%
Sports training	0.6%	1.2%	2.4%	1.9%	1.2%
Health or medical care	0.7%	0.0%	0.0%	0.4%	0.0%
Fairs and congresses	0.3%	0.0%	0.5%	1.0%	0.2%
Others	0.4%	0.8%	0.8%	2.3%	0.0%

What is the main motivation for their holidays?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Rest	51.6%	48.4%	46.4%	54.4%	47.7%
Enjoy family time	12.0%	13.1%	13.8%	13.2%	13.4%
Have fun	5.9%	5.0%	10.6%	7.8%	6.7%
Explore the destination	25.8%	29.6%	24.4%	19.6%	28.5%
Practice their hobbies	3.3%	2.6%	4.2%	2.6%	2.7%
Other reasons	1.4%	1.2%	0.5%	2.4%	1.0%

Where did they spend their main holiday last year? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Didn't have holidays	--	21.6%	9.7%	11.7%	8.5%
Canary Islands	--	18.1%	24.7%	22.2%	23.2%
Other destination	--	60.3%	65.6%	66.1%	68.2%
- Balearic Islands	--	1.3%	1.3%	4.3%	1.7%
- Rest of Spain	--	6.6%	8.8%	8.2%	10.5%
- Italy	--	32.9%	28.0%	20.1%	20.1%
- France	--	2.1%	5.4%	4.7%	4.2%
- Turkey	--	0.0%	0.6%	1.8%	3.2%
- Greece	--	7.7%	3.3%	6.3%	7.6%
- Portugal	--	1.4%	3.2%	2.0%	2.2%
- Croatia	--	1.7%	5.2%	1.4%	3.0%
- Egypt	--	0.0%	1.2%	2.2%	2.3%
- Tunisia	--	0.0%	0.0%	0.3%	0.3%
- Morocco	--	0.4%	0.4%	1.4%	2.2%
- Others	--	6.2%	8.0%	13.3%	11.0%

* Percentage of valid answers

What other destinations did they consider for this trip? *

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
None (I was clear about "this Canary Island")	--	41.0%	35.4%	39.3%	35.7%
Canary Islands (other island)	--	36.7%	32.2%	31.0%	37.3%
Other destination	--	22.3%	32.4%	29.7%	27.0%
- Balearic Islands	--	1.3%	3.3%	2.7%	2.1%
- Rest of Spain	--	5.4%	8.5%	6.8%	6.9%
- Italy	--	5.1%	3.4%	3.2%	1.8%
- France	--	1.5%	0.7%	1.0%	0.8%
- Turkey	--	0.3%	1.1%	1.2%	2.0%
- Greece	--	2.3%	2.0%	1.0%	2.0%
- Portugal	--	2.5%	6.3%	4.8%	4.1%
- Croatia	--	0.6%	1.5%	0.0%	0.4%
- Egypt	--	1.6%	3.7%	4.7%	3.8%
- Others	--	1.7%	1.9%	4.3%	3.2%

* Percentage of valid answers

Importance of each factor in the destination choice



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Climate	76.3%	73.2%	74.0%	76.5%	76.1%
Landscapes	58.6%	57.4%	56.9%	62.0%	57.9%
Environment	55.8%	55.6%	56.4%	59.8%	57.6%
Sea	53.2%	52.7%	52.7%	53.5%	51.8%
Tranquility	55.0%	50.6%	49.1%	52.9%	50.7%
Beaches	49.6%	52.4%	48.7%	51.8%	49.5%
Safety	44.0%	38.3%	38.8%	41.9%	42.0%
European belonging	39.2%	44.5%	35.5%	37.1%	39.0%
Price	27.7%	32.1%	32.9%	31.8%	31.6%
Effortless trip	32.7%	32.2%	32.7%	32.8%	31.5%
Authenticity	24.1%	29.2%	28.3%	27.9%	29.1%
Accommodation supply	30.2%	25.9%	28.0%	26.7%	28.3%
Fun possibilities	19.5%	22.4%	21.1%	22.7%	24.5%
Hiking trail network	20.8%	20.1%	20.9%	25.5%	21.9%
Gastronomy	20.8%	17.7%	19.8%	20.3%	20.0%
Nightlife	10.3%	9.7%	12.0%	13.7%	16.5%
Exoticism	13.1%	16.8%	13.3%	13.3%	15.2%
Shopping	11.8%	8.7%	12.2%	13.0%	12.7%
Historical heritage	10.0%	9.4%	12.1%	11.9%	11.1%
Culture	9.8%	7.5%	12.1%	10.6%	10.5%

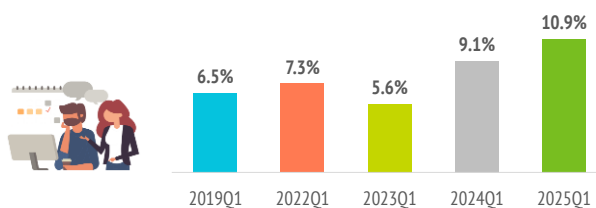
Each aspect is rated individually ("Not important", "Somewhat important", "Quite important", "Very important")
% of tourists who indicate that the factor is "very important" in their choice.

How far in advance do they book their trip?



	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
The same day	1.1%	1.3%	0.4%	0.5%	1.9%
Between 1 and 30 days	40.4%	44.1%	30.4%	22.9%	24.1%
Between 1 and 2 months	30.9%	26.5%	37.5%	35.0%	32.6%
Between 3 and 6 months	21.2%	20.9%	26.0%	32.5%	30.5%
More than 6 months	6.5%	7.3%	5.6%	9.1%	10.9%

% TOURISTS WHO BOOK MORE THAN 6 MONTHS IN ADVANCE



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

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Previous visits to the Canary Islands	38.7%	44.8%	41.3%	37.6%	36.4%
Friends or relatives	33.0%	38.0%	38.8%	39.2%	35.0%
Internet or social media	44.6%	42.5%	40.7%	46.6%	46.1%
Mass Media	1.7%	0.8%	1.0%	0.6%	0.2%
Travel guides and magazines	2.5%	5.1%	3.5%	4.8%	4.7%
Travel Blogs or Forums	4.3%	10.6%	7.4%	7.1%	7.2%
Travel TV Channels	0.0%	0.3%	0.2%	1.1%	1.5%
Tour Operator or Travel Agency	10.0%	7.3%	9.6%	12.5%	10.3%
Public administrations or similar	0.3%	3.1%	0.0%	0.7%	0.0%
Others	3.4%	2.2%	2.1%	2.3%	4.7%

* Multi-choice question

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With whom did they book their flight and accommodation?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Flight					
- Directly with the airline	67.0%	85.1%	72.6%	70.1%	77.9%
- Tour Operator or Travel Agency	33.0%	14.9%	27.4%	29.9%	22.1%
Accommodation					
- Directly with the accommodation	55.5%	68.8%	54.6%	62.0%	59.5%
- Tour Operator or Travel Agency	44.5%	31.2%	45.4%	38.0%	40.5%

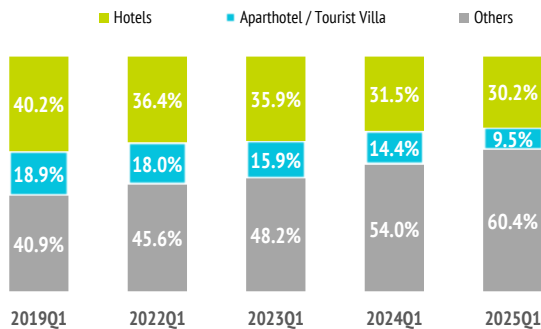
Where does the flight come from?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Italy	75.6%	83.1%	87.9%	82.5%	84.4%
Spanish Mainland	20.0%	12.1%	8.3%	14.6%	11.8%
Germany	0.6%	1.0%	0.2%	0.2%	0.8%
United Kingdom	1.3%	0.6%	0.9%	0.7%	0.7%
Slovakia	0.0%	0.0%	0.0%	0.0%	0.7%
Switzerland	0.8%	0.1%	0.7%	0.4%	0.4%
Portugal	0.6%	2.2%	0.6%	0.9%	0.4%
Others	0.2%	0.0%	0.5%	0.1%	0.2%
France	0.5%	0.4%	0.1%	0.2%	0.2%
Norway	0.1%	0.3%	0.0%	0.0%	0.1%
Others	0.3%	0.2%	0.7%	0.4%	0.3%

Where do they stay?

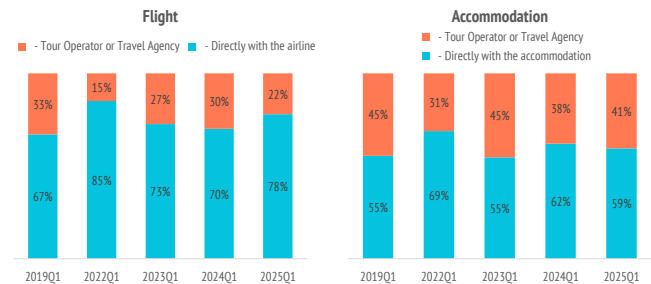
	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
1-2-3* Hotel	9.7%	14.1%	8.4%	8.0%	8.9%
4* Hotel	26.8%	20.2%	22.7%	20.5%	17.4%
5* Hotel / 5* Luxury Hotel	3.7%	2.1%	4.7%	3.0%	3.8%
Aparthotel / Tourist Villa	18.9%	18.0%	15.9%	14.4%	9.5%
House/room rented in a private dwelling	13.6%	18.4%	14.8%	35.5%	39.1%
Private accommodation (1)	20.3%	15.6%	21.6%	13.2%	14.8%
Others (Cottage, cruise, camping,...)	7.0%	11.6%	11.9%	5.3%	6.5%

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



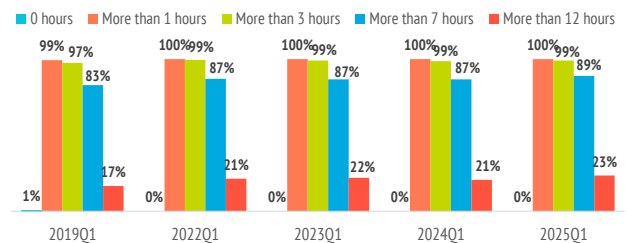
What do they book?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Room only	43.9%	53.8%	54.7%	54.2%	62.2%
Bed and Breakfast	13.5%	11.0%	12.1%	7.6%	9.8%
Half board	15.5%	14.7%	12.0%	13.6%	13.6%
Full board	4.3%	2.8%	6.4%	6.7%	5.4%
All inclusive	22.8%	17.7%	14.7%	17.9%	9.0%



Activities in the Canary Islands

Outdoor time per day	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
0 hours	0.7%	0.0%	0.0%	0.0%	0.0%
1 - 2 hours	1.8%	0.6%	0.9%	1.3%	1.0%
3 - 6 hours	14.6%	12.4%	12.3%	12.0%	10.1%
7 - 12 hours	66.4%	65.7%	64.7%	66.1%	65.4%
More than 12 hours	16.5%	21.3%	22.0%	20.6%	23.5%
Outdoor time per day	9.8	10.2	10.4	10.3	10.7



Activities in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Beach	78.5%	83.3%	83.8%	82.8%	83.1%
Walk, wander	67.7%	74.9%	76.2%	73.8%	72.6%
Explore the island on their own	56.0%	61.1%	62.1%	62.0%	61.8%
Swimming pool, hotel facilities	41.9%	47.9%	40.3%	40.3%	39.4%
Taste Canarian gastronomy	26.8%	33.4%	29.8%	27.5%	27.3%
Organized excursions	16.5%	21.2%	17.9%	21.5%	23.1%
Hiking	--	19.1%	20.5%	16.5%	17.9%
Theme parks	14.0%	11.3%	14.2%	16.8%	16.1%
Nightlife / concerts / shows	14.6%	11.0%	12.6%	16.2%	15.9%
Other Nature Activities	--	16.8%	16.1%	13.1%	14.8%
Sea excursions / whale watching	9.9%	15.5%	11.6%	12.0%	13.2%
Museums / exhibitions	15.3%	13.9%	13.0%	14.1%	13.1%
Wineries / markets / popular festivals	15.8%	11.9%	14.0%	15.4%	12.6%
Surf	--	11.5%	8.7%	8.5%	7.7%
Running	--	10.0%	4.8%	5.4%	6.6%
Practice other sports	--	6.9%	6.0%	4.1%	5.2%
Beauty and health treatments	3.9%	4.1%	4.9%	5.8%	5.0%
Swim	--	35.3%	6.7%	3.9%	4.7%
Astronomical observation	2.3%	4.1%	3.8%	3.7%	4.1%
Cycling / Mountain bike	--	4.1%	3.0%	3.0%	2.3%
Scuba Diving	--	3.8%	3.2%	3.8%	2.3%
Windsurf / Kitesurf	--	2.0%	1.9%	1.5%	1.7%
Golf	--	2.9%	0.8%	1.7%	1.4%

* Multi-choice question

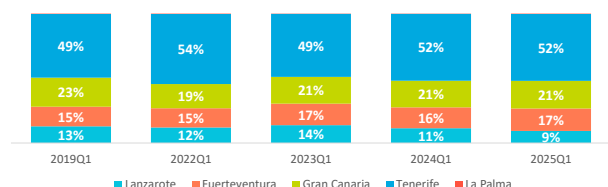
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ITALY: First Quarter



Which island do they choose?

Tourists (≥ 16 year old)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	15,870	13,424	20,254	20,731	19,458
Fuerteventura	18,474	16,651	24,281	29,355	36,179
Gran Canaria	27,610	20,893	30,187	37,303	44,532
Tenerife	60,251	60,588	71,201	93,608	107,561
La Palma	364	336	365	448	603



How many are loyal to the Canary Islands?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Repeat tourists	59.7%	63.7%	62.1%	58.2%	57.0%
At least 10 previous visits	8.2%	18.8%	15.2%	12.2%	12.8%
Repeat tourists (last 5 years)	57.2%	56.9%	59.3%	54.6%	52.1%
Repeat tourists (last 5 years)(5 or more visits)	12.5%	13.7%	20.0%	14.0%	12.8%

Who are they?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Gender					
Men	50.8%	49.7%	50.3%	51.6%	49.5%
Women	49.2%	50.3%	49.7%	48.4%	50.5%
Age					
Average age	46.2	44.8	44.8	43.7	42.6
Standard deviation	14.7	16.3	17.0	16.4	16.5
Age range					
16 - 24 years old	6.9%	13.0%	13.6%	11.2%	14.8%
25 - 30 years old	12.1%	12.8%	15.5%	15.4%	16.7%
31 - 45 years old	26.9%	28.3%	23.5%	31.0%	28.0%
46 - 60 years old	36.2%	23.4%	24.6%	23.7%	21.1%
Over 60 years old	17.8%	22.5%	22.9%	18.8%	19.5%
Occupation					
Salaried worker	35.2%	45.0%	40.3%	42.4%	40.3%
Self-employed	26.5%	14.5%	20.1%	19.4%	17.6%
Unemployed	4.3%	1.9%	1.6%	4.6%	5.5%
Business owner	14.4%	12.6%	10.6%	9.6%	14.2%
Student	6.1%	5.2%	9.5%	7.1%	7.5%
Retired	10.6%	18.2%	17.1%	16.0%	12.4%
Unpaid domestic work	2.8%	1.2%	0.5%	0.5%	0.7%
Others	0.0%	1.4%	0.5%	0.3%	1.9%
Annual household income level					
Less than €25,000	31.6%	28.0%	22.0%	16.9%	21.1%
€25,000 - €49,999	44.1%	44.4%	40.6%	49.9%	47.0%
€50,000 - €74,999	11.3%	18.5%	20.4%	14.9%	19.8%
More than €74,999	13.0%	9.1%	17.1%	18.2%	12.1%
Education level					
No studies	1.0%	0.9%	0.2%	0.1%	0.9%
Primary education	5.2%	2.4%	2.6%	0.8%	2.4%
Secondary education	22.3%	16.9%	16.9%	20.9%	13.0%
Higher education	71.5%	79.8%	80.3%	78.2%	83.7%

Share by islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Lanzarote	12.9%	12.0%	13.8%	11.4%	9.3%
Fuerteventura	15.1%	14.9%	16.6%	16.2%	17.4%
Gran Canaria	22.5%	18.7%	20.6%	20.6%	21.4%
Tenerife	49.2%	54.1%	48.7%	51.6%	51.6%
La Palma	0.3%	0.3%	0.2%	0.2%	0.3%

How many islands do they visit during their trip?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
One island	85.5%	89.8%	90.9%	86.0%	92.1%
Two islands	11.9%	8.0%	8.2%	12.5%	6.6%
Three or more islands	2.6%	2.2%	1.0%	1.6%	1.3%

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Average rating	8.42	8.80	8.74	8.74	8.64

Experience in the Canary Islands	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Worse or much worse than expected	1.7%	1.7%	1.8%	3.6%	2.7%
Lived up to expectations	56.6%	54.0%	53.6%	47.3%	53.6%
Better or much better than expected	41.7%	44.4%	44.6%	49.0%	43.6%

Future intentions (scale 0-10)	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Return to the Canary Islands	8.66	8.94	8.97	8.96	8.84
Recommend visiting the Canary Islands	8.81	9.12	9.02	9.04	9.01

Who do they come with?

	2019Q1	2022Q1	2023Q1	2024Q1	2025Q1
Unaccompanied	20.8%	14.7%	18.3%	14.2%	12.2%
Only with partner	40.5%	46.8%	45.1%	44.5%	46.2%
Only with children (< 13 years old)	6.0%	3.4%	3.2%	5.5%	2.9%
Partner + children (< 13 years old)	2.0%	4.1%	3.5%	4.3%	4.9%
Other relatives	6.5%	7.0%	7.6%	5.5%	6.2%
Friends	12.5%	14.5%	11.5%	13.8%	14.4%
Work colleagues	0.2%	0.0%	0.7%	0.7%	1.1%
Organized trip	0.3%	0.0%	0.0%	0.4%	1.7%
Other combinations (2)	11.1%	9.5%	10.1%	11.2%	10.5%

(2) Combination of some of the groups previously analyzed

Tourists with children	12.1%	9.6%	9.9%	15.2%	9.2%
- Between 0 and 2 years old	2.7%	0.0%	0.1%	5.3%	1.2%
- Between 3 and 12 years old	8.5%	9.3%	9.5%	9.1%	7.7%
- Between 0-2 and 3-12 years old	1.0%	0.3%	0.3%	0.8%	0.2%
Tourists without children	87.9%	90.4%	90.1%	84.8%	90.8%
Group composition:					
- 1 person	28.0%	18.2%	23.6%	17.2%	15.1%
- 2 people	47.8%	55.6%	50.5%	48.2%	56.6%
- 3 people	11.3%	9.9%	11.6%	15.8%	13.6%
- 4 or 5 people	10.1%	13.9%	10.8%	12.5%	10.9%
- 6 or more people	2.7%	2.3%	3.5%	6.3%	3.8%
Average group size:	2.18	2.36	2.34	2.56	2.44

*People who share the main expenses of the trip

Source: Encuesta sobre Gasto Turístico (EGT, ISTAC).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.