

Profile of Italian tourist visiting Canary Islands

2016

How many are they and how much do they spend?



| | Italy | All markets |
|--------------------------------------|---------|-------------|
| Tourist arrivals (> 16 years old) | 427,746 | 13,114,359 |
| Average daily expenditure (€) | 134.24 | 135.94 |
| . in their place of residence | 90.34 | 98.03 |
| . in the Canary Islands | 43.89 | 37.90 |
| Average length of stay | 9.73 | 9.36 |
| Turnover per tourist (€) | 1,125 | 1,141 |
| Total turnover (> 16 years old) (€m) | 481 | 14,957 |
| Share of total turnover | 3.2% | 100% |
| Share of total tourist | 3.3% | 100% |

Expenditure in the Canary Islands per tourist and trip (€) ^(*)

| | Italy | All markets |
|-------------------------------------|--------|-------------|
| Accommodation (**): | 79.78 | 47.11 |
| - Accommodation | 69.22 | 40.52 |
| - Additional accommodation expenses | 10.56 | 6.60 |
| Transport: | 39.53 | 26.01 |
| - Public transport | 10.34 | 5.14 |
| - Taxi | 5.20 | 6.94 |
| - Car rental | 23.98 | 13.93 |
| Food and drink: | 148.29 | 148.33 |
| - Food purchases at supermarkets | 62.98 | 63.46 |
| - Restaurants | 85.31 | 84.87 |
| Souvenirs: | 56.23 | 53.88 |
| Leisure: | 45.19 | 34.52 |
| - Organized excursions | 18.02 | 14.95 |
| - Leisure, amusement | 4.44 | 4.55 |
| - Trip to other islands | 3.12 | 1.85 |
| - Sporting activities | 5.48 | 5.11 |
| - Cultural activities | 3.07 | 2.04 |
| - Discos and disco-pubs | 11.05 | 6.01 |
| Others: | 13.32 | 13.91 |
| - Wellness | 2.01 | 3.23 |
| - Medical expenses | 1.29 | 1.69 |
| - Other expenses | 10.02 | 8.99 |

How far in advance do they book their trip?



| | Italy | All markets |
|-------------------------|-------|-------------|
| The same day they leave | 0.7% | 0.6% |
| Between 2 and 7 days | 6.9% | 6.3% |
| Between 8 and 15 days | 10.4% | 7.9% |
| Between 16 and 30 days | 19.3% | 14.7% |
| Between 31 and 90 days | 39.5% | 34.3% |
| More than 90 days | 23.3% | 36.2% |

What do they book at their place of residence?



| | Italy | All markets |
|--|-------|-------------|
| Flight only | 16.4% | 8.8% |
| Flight and accommodation (room only) | 30.5% | 25.7% |
| Flight and accommodation (B&B) | 5.2% | 8.0% |
| Flight and accommodation (half board) | 14.0% | 20.4% |
| Flight and accommodation (full board) | 8.9% | 4.3% |
| Flight and accommodation (all inclusive) | 24.9% | 32.8% |
| % Tourists using low-cost airlines | 72.4% | 48.7% |
| Other expenses in their place of residence: | | |
| - Car rental | 22.4% | 11.8% |
| - Sporting activities | 2.7% | 5.3% |
| - Excursions | 6.5% | 5.7% |
| - Trip to other islands | 1.9% | 1.6% |

How do they book?



| | Italy | All markets |
|--------------------------------------|-------|-------------|
| Accommodation booking | | |
| Tour Operator | 25.2% | 42.3% |
| - Tour Operator's website | 71.0% | 78.8% |
| Accommodation | 19.0% | 14.7% |
| - Accommodation's website | 85.6% | 83.5% |
| Travel agency (High street) | 21.6% | 20.5% |
| Online Travel Agency (OTA) | 26.3% | 16.5% |
| No need to book accommodation | 7.9% | 6.0% |

| | Italy | All markets |
|------------------------------------|-------|-------------|
| Flight booking | | |
| Tour Operator | 25.7% | 44.6% |
| - Tour Operator's website | 66.6% | 76.3% |
| Airline | 40.1% | 24.8% |
| - Airline's website | 98.3% | 96.2% |
| Travel agency (High street) | 21.8% | 19.1% |
| Online Travel Agency (OTA) | 12.4% | 11.5% |

Where do they stay?



| | Italy | All markets |
|---|-------|-------------|
| 5* Hotel | 4.2% | 7.1% |
| 4* Hotel | 34.8% | 39.6% |
| 1-2-3* Hotel | 14.0% | 14.6% |
| Apartment | 37.1% | 31.5% |
| Property (privately-owned, friends, family) | 6.8% | 4.6% |
| Others | 3.1% | 2.6% |

Who are they?



| | Italy | All markets |
|---------------------|-------|-------------|
| Gender | | |
| Percentage of men | 55.3% | 48.5% |
| Percentage of women | 44.7% | 51.5% |

| | Italy | All markets |
|---------------------------------------|-------|-------------|
| Age | | |
| Average age (tourists > 16 years old) | 42.1 | 46.3 |
| Standard deviation | 14.6 | 15.3 |

| | Italy | All markets |
|--------------------------------------|-------|-------------|
| Age range (> 16 years old) | | |
| 16-24 years old | 10.6% | 8.2% |
| 25-30 years old | 16.6% | 11.1% |
| 31-45 years old | 33.8% | 29.1% |
| 46-60 years old | 26.4% | 30.9% |
| Over 60 years old | 12.5% | 20.7% |

| | Italy | All markets |
|----------------------------------|-------|-------------|
| Occupation | | |
| Business owner or self-employed | 27.0% | 23.1% |
| Upper/Middle management employee | 31.5% | 36.1% |
| Auxiliary level employee | 19.1% | 15.5% |
| Students | 6.9% | 5.1% |
| Retired | 10.4% | 18.0% |
| Unemployed / unpaid dom. work | 5.2% | 2.2% |

| | Italy | All markets |
|--------------------------------------|-------|-------------|
| Annual household income level | | |
| €12,000 - €24,000 | 35.3% | 17.8% |
| €24,001 - €36,000 | 26.3% | 19.4% |
| €36,001 - €48,000 | 14.1% | 16.9% |
| €48,001 - €60,000 | 9.1% | 14.6% |
| €60,001 - €72,000 | 4.4% | 9.5% |
| €72,001 - €84,000 | 2.2% | 6.0% |
| More than €84,000 | 8.4% | 15.8% |

(*) 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.

Profile of Italian tourist visiting Canary Islands

2016



Which island do they choose?



| Tourists (> 16 years old) | Italy | All markets |
|---------------------------|---------|-------------|
| - Lanzarote | 49,252 | 2,328,674 |
| - Fuerteventura | 104,311 | 1,914,107 |
| - Gran Canaria | 83,314 | 3,654,806 |
| - Tenerife | 188,451 | 4,885,901 |
| - La Palma | 1,300 | 221,541 |

| Share (%) | Italy | All markets |
|-----------------|-------|-------------|
| - Lanzarote | 11.5% | 17.9% |
| - Fuerteventura | 24.5% | 14.7% |
| - Gran Canaria | 19.5% | 28.1% |
| - Tenerife | 44.2% | 37.6% |
| - La Palma | 0.3% | 1.7% |

Who do they come with?



| | Italy | All markets |
|--|-------|-------------|
| Unaccompanied | 11.5% | 9.1% |
| Only with partner | 47.3% | 47.6% |
| Only with children (under the age of 13) | 1.5% | 1.5% |
| Partner + children (under the age of 13) | 7.9% | 11.8% |
| Other relatives | 6.3% | 6.0% |
| Friends | 9.9% | 6.1% |
| Work colleagues | 0.6% | 0.3% |
| Other combinations ⁽¹⁾ | 15.0% | 17.5% |

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

How do they rate the destination?



| Impression of their stay | Italy | All markets |
|--------------------------------|-------|-------------|
| Good or very good (% tourists) | 93.3% | 94.1% |
| Average rating (scale 1-10) | 8.63 | 8.90 |

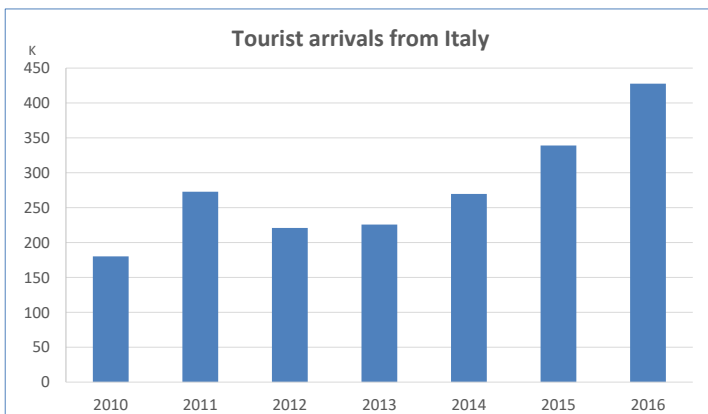
How many are loyal to the destination?

| Repeat tourists of the Canary Islands | Italy | All markets |
|---------------------------------------|-------|-------------|
| Repeat tourists | 53.4% | 77.3% |
| In love (at least 10 previous visits) | 6.0% | 16.1% |

Where does the flight come from?



| Ten main origin markets | Italy | All markets |
|-------------------------|---------|-------------|
| Italy | 328,610 | 346,999 |
| Spanish Mainland | 88,977 | 2,164,168 |
| Germany | 4,381 | 2,882,932 |
| United Kingdom | 1,909 | 4,208,588 |
| Switzerland | 977 | 312,564 |
| Belgium | 703 | 444,170 |
| Norway | 635 | 393,235 |
| Austria | 621 | 113,534 |
| Ireland | 286 | 431,419 |
| France | 222 | 227,689 |



Why do they choose the Canary Islands?



| Aspects influencing the choice | Italy | All markets |
|-----------------------------------|-------|-------------|
| Climate/sun | 83.9% | 89.8% |
| Beaches | 39.8% | 34.5% |
| Tranquillity/rest/relaxation | 32.7% | 36.6% |
| Scenery | 29.0% | 21.9% |
| Visiting new places | 20.0% | 14.6% |
| Price | 14.7% | 12.7% |
| Quality of the environment | 12.1% | 6.5% |
| Security | 9.6% | 11.1% |
| Active tourism | 5.0% | 5.1% |
| Ease of travel | 4.0% | 8.9% |
| Nightlife/fun | 2.7% | 3.8% |
| Suitable destination for children | 2.6% | 7.5% |
| Theme parks | 2.4% | 3.0% |
| Nautic activities | 1.7% | 2.2% |
| Culture | 1.3% | 2.6% |
| Golf | 1.1% | 0.9% |

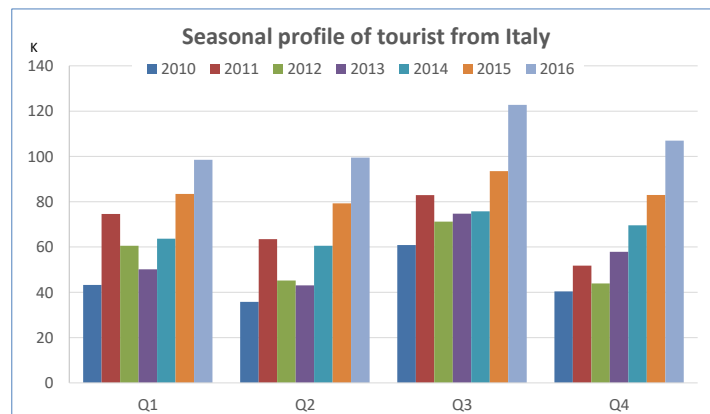
* Multi-choice question

What did motivate them to come?



| Aspects motivating the choice | Italy | All markets |
|--|-------|-------------|
| Previous visits to the Canary Islands | 43.1% | 64.1% |
| Recommendation by friends or relatives | 43.4% | 34.5% |
| The Canary Islands television channel | 0.4% | 0.3% |
| Other television or radio channels | 2.3% | 0.8% |
| Information in the press/magazines/books | 8.8% | 3.8% |
| Attendance at a tourism fair | 0.7% | 0.5% |
| Tour Operator's brochure or catalogue | 6.5% | 8.0% |
| Recommendation by Travel Agency | 13.7% | 9.7% |
| Information obtained via the Internet | 32.0% | 25.8% |
| Senior Tourism programme | 0.5% | 0.2% |
| Others | 3.8% | 6.1% |

* Multi-choice question



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.