

PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

ITALY



How many are they and how much do they spend?

	Italy	All markets
TOURISTS		
Tourist arrivals (FRONTUR)	491,569	15,559,787
Tourist arrivals > 15 years old (EGT)	442,408	13,485,651
- book holiday package	132,901	7,848,516
- do not book holiday package	309,508	5,637,135
- % tourists who book holiday package	30.0%	58.2%
Share of total tourist	3.2%	100%

RANKING POSITION BY
NUMBER OF TOURISTS



RANKING POSITION BY
TURNOVER



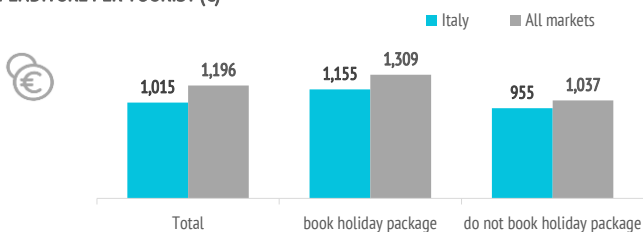
44% of Italians
travel to Tenerife.

	Italy	All markets
Expenditure per tourist (€)	1,015	1,196
- book holiday package	1,155	1,309
- holiday package	934	1,064
- others	220	246
- do not book holiday package	955	1,037
- flight	260	288
- accommodation	307	350
- others	388	399
Average length of stay	10.08	9.32
- book holiday package	8.09	8.66
- do not book holiday package	10.94	10.23
Average daily expenditure (€)	118.6	143.6
- book holiday package	148.8	159.8
- do not book holiday package	105.7	121.0
Total turnover (> 15 years old) (€m)	449	16,124
- book holiday package	153	10,277
- do not book holiday package	296	5,848

AVERAGE LENGTH OF STAY
(nights)



EXPENDITURE PER TOURIST (€)



Importance of each factor in the destination choice

	Italy	All markets
Climate	75.6%	78.1%
Tranquility	54.6%	46.2%
Environment	53.7%	30.6%
Landscapes	53.4%	31.6%
Sea	51.0%	43.3%
Beaches	48.1%	37.1%
Safety	44.0%	51.4%
European belonging	40.7%	35.8%
Price	33.7%	36.5%
Effortless trip	32.2%	34.8%
Accommodation supply	28.6%	41.7%
Authenticity	24.6%	19.1%
Fun possibilities	20.9%	20.7%
Hiking trail network	20.5%	9.0%
Gastronomy	19.5%	22.6%
Shopping	13.9%	9.6%
Exoticism	12.4%	10.5%
Nightlife	12.1%	7.5%
Historical heritage	10.0%	7.1%
Culture	9.3%	7.3%

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.

% TOURISTS WHO CHOOSE ENVIRONMENT

ITALY
53.7%



ALL MARKETS
30.6%

What is the main motivation for their holidays?

	Italy	All markets
Rest	49.6%	55.1%
Enjoy family time	12.0%	14.7%
Have fun	7.9%	7.8%
Explore the destination	26.3%	18.5%
Practice their hobbies	2.3%	1.8%
Other reasons	1.8%	2.1%

EXPLORE THE
DESTINATION



How far in advance do they book their trip?

	Italy	All markets
The same day	0.4%	0.7%
Between 1 and 30 days	22.9%	23.2%
Between 1 and 2 months	30.9%	23.0%
Between 3 and 6 months	35.1%	32.4%
More than 6 months	10.6%	20.7%

Source: Encuesta sobre el Gasto Turístico (ISTAC). The results are not comparable with previous years' reports.

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

PROFILE OF TOURIST VISITING THE CANARY ISLANDS (2018)

ITALY



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

	Italy	All markets
Previous visits to the Canary Islands	33.2%	50.9%
Friends or relatives	31.2%	27.8%
Internet or social media	51.2%	56.1%
Mass Media	1.9%	1.7%
Travel guides and magazines	7.5%	9.5%
Travel Blogs or Forums	6.0%	5.4%
Travel TV Channels	0.6%	0.7%
Tour Operator or Travel Agency	15.6%	24.7%
Public administrations or similar	0.2%	0.4%
Others	1.6%	2.3%

* Multi-choice question

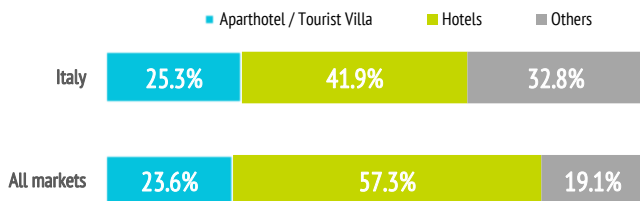
With whom did they book their flight and accommodation?

	Italy	All markets
Flight		
- Directly with the airline	62.0%	39.5%
- Tour Operator or Travel Agency	38.0%	60.5%
Accommodation		
- Directly with the accommodation	49.6%	28.8%
- Tour Operator or Travel Agency	50.4%	71.2%

Where do they stay?

	Italy	All markets
1-2-3* Hotel	11.0%	12.8%
4* Hotel	25.9%	37.7%
5* Hotel / 5* Luxury Hotel	5.1%	6.8%
Aparthotel / Tourist Villa	25.3%	23.6%
House/room rented in a private dwelling	11.6%	5.3%
Private accommodation (1)	13.6%	7.0%
Others (Cottage, cruise, camping,...)	7.6%	6.8%

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



What do they book?

	Italy	All markets
Room only	45.9%	28.8%
Bed and Breakfast	11.8%	11.7%
Half board	17.9%	22.4%
Full board	5.6%	3.0%
All inclusive	18.7%	34.1%

”
45.9% of Italians book room only.
 (Canary Islands: 28.8)

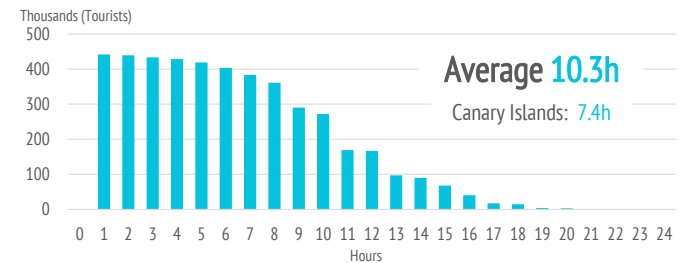
Other expenses

	Italy	All markets
Restaurants or cafes	66.3%	63.2%
Supermarkets	59.0%	55.9%
Car rental	40.9%	26.6%
Organized excursions	23.6%	21.8%
Taxi, transfer, chauffeur service	24.8%	51.7%
Theme Parks	7.5%	8.8%
Sport activities	5.2%	6.4%
Museums	7.5%	5.0%
Flights between islands	8.6%	4.8%

Activities in the Canary Islands

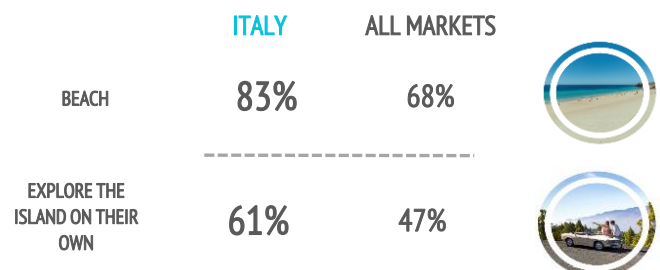
Outdoor time per day	Italy	All markets
0 hours	0.1%	2.2%
1 - 2 hours	1.9%	10.0%
3 - 6 hours	11.3%	32.6%
7 - 12 hours	64.8%	46.5%
More than 12 hours	21.9%	8.7%

TOURISTS BY HOURS A DAY OUT OF THE ACCOMMODATION



Activities in the Canary Islands	Italy	All markets
Beach	83.0%	68.0%
Walk, wander	70.3%	71.0%
Explore the island on their own	61.3%	46.5%
Swimming pool, hotel facilities	43.4%	58.9%
Taste Canarian gastronomy	30.7%	25.4%
Organized excursions	18.1%	17.9%
Nightlife / concerts / shows	17.2%	15.5%
Wineries / markets / popular festivals	16.5%	12.0%
Theme parks	14.7%	15.5%
Museums / exhibitions	13.9%	9.8%
Sport activities	12.8%	14.3%
Sea excursions / whale watching	10.9%	11.3%
Nature activities	7.1%	10.0%
Activities at sea	6.3%	9.8%
Beauty and health treatments	5.3%	5.7%
Astronomical observation	1.9%	3.4%

* Multi-choice question



Which island do they choose?

Tourists (> 15 years old)	Italy	All markets
Lanzarote	64,835	2,457,120
Fuerteventura	85,710	1,856,705
Gran Canaria	94,242	3,825,110
Tenerife	195,175	4,991,173
La Palma	1,632	249,069

How many islands do they visit during their trip?

	Italy	All markets
One island	84.7%	90.9%
Two islands	13.9%	7.7%
Three or more islands	1.4%	1.4%

Internet usage during their trip

	Italy	All markets
Research		
- Tourist package	11.3%	15.4%
- Flights	8.6%	13.0%
- Accommodation	10.4%	17.7%
- Transport	15.6%	15.6%
- Restaurants	29.5%	27.0%
- Excursions	31.3%	26.3%
- Activities	33.4%	31.0%
Book or purchase		
- Tourist package	23.3%	38.1%
- Flights	77.7%	64.4%
- Accommodation	64.6%	54.5%
- Transport	51.4%	44.7%
- Restaurants	13.1%	10.5%
- Excursions	11.0%	11.4%
- Activities	11.8%	12.5%

* Multi-choice question

Internet usage in the Canary Island	Italy	All markets
Did not use the Internet	7.0%	9.8%
Used the Internet	93.0%	90.2%
- Own Internet connection	54.4%	36.5%
- Free Wifi connection	25.9%	41.1%
Applications*		
- Search for locations or maps	74.5%	60.7%
- Search for destination info	32.9%	44.7%
- Share pictures or trip videos	57.0%	55.6%
- Download tourist apps	8.2%	6.5%
- Others	10.3%	23.9%

* Multi-choice question



57% of Italians share pictures or trip videos during their stay in the Canary Islands

(Canary Islands: 55.6%)



Share by islands	Italy	All markets
Lanzarote	14.7%	18.4%
Fuerteventura	19.4%	13.9%
Gran Canaria	21.3%	28.6%
Tenerife	44.2%	37.3%
La Palma	0.4%	1.9%

MOST VISITED PLACES IN EACH ISLAND

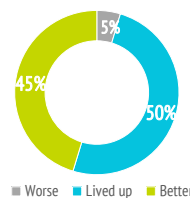


The data refers to % of tourists on each island who have visited the place.

How do they rate the Canary Islands?

Satisfaction (scale 0-10)	Italy	All markets
Average rating	8.45	8.58
Experience in the Canary Islands		
Worse or much worse than expected	4.6%	2.9%
Lived up to expectations	50.1%	57.4%
Better or much better than expected	45.3%	39.7%

Future intentions (scale 1-10)	Italy	All markets
Return to the Canary Islands	8.63	8.60
Recommend visiting the Canary Island	8.83	8.86



Experience in the Canary Islands



Return to the Canary Islands



Recommend visiting the Canary Islands

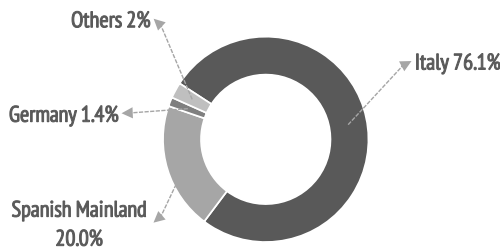
How many are loyal to the Canary Islands?

	Italy	All markets
Repeat tourists	51.0%	71.0%
Repeat tourists (last 5 years)	48.0%	64.6%
Repeat tourists (last 5 years) (5 or mor	9.9%	18.4%
At least 10 previous visits	7.4%	17.8%

Where does the flight come from?



	%	Absolute
Italy	76.1%	336,493
Spanish Mainland	20.0%	88,610
Germany	1.4%	6,315
United Kingdom	1.0%	4,277
Switzerland	0.3%	1,328
Sweden	0.2%	1,003
Others	1.0%	4,383



Who do they come with?



	Italy	All markets
Unaccompanied	13.0%	8.9%
Only with partner	45.5%	47.4%
Only with children (< 13 years old)	7.0%	5.9%
Partner + children (< 13 years old)	4.4%	7.2%
Other relatives	5.4%	9.0%
Friends	10.2%	6.3%
Work colleagues	0.6%	0.5%
Organized trip	0.1%	0.2%
Other combinations (1)	13.7%	14.6%

(1) Different situations have been isolated

Tourists with children	14.6%	19.3%
- Between 0 and 2 years old	1.6%	1.8%
- Between 3 and 12 years old	11.4%	15.8%
- Between 0 -2 and 3-12 years	1.6%	1.6%
Tourists without children	85.4%	80.7%
Group composition:		
- 1 person	19.1%	12.4%
- 2 people	51.4%	54.1%
- 3 people	13.7%	12.6%
- 4 or 5 people	13.9%	17.1%
- 6 or more people	1.9%	3.8%
Average group size:	2.35	2.58



(Under the age of 13)

14.6% of Italians travel with children.

(Canary Islands: 19.3%)

Who are they?



	Italy	All markets
Gender		
Men	52.0%	48.2%
Women	48.0%	51.8%
Age		
Average age (tourist > 15 years old)	43.6	46.7
Standard deviation	14.6	15.3
Age range (> 15 years old)		
16 - 24 years old	9.7%	7.7%
25 - 30 years old	14.2%	10.8%
31 - 45 years old	31.4%	28.6%
46 - 60 years old	29.6%	31.3%
Over 60 years old	15.1%	21.5%
Occupation		
Salaried worker	41.3%	55.5%
Self-employed	22.9%	11.0%
Unemployed	4.5%	1.1%
Business owner	9.6%	9.2%
Student	8.2%	4.2%
Retired	12.0%	17.3%
Unpaid domestic work	0.9%	0.9%
Others	0.6%	0.8%
Annual household income level		
Less than €25,000	30.3%	17.0%
€25,000 - €49,999	46.2%	36.5%
€50,000 - €74,999	11.7%	25.0%
More than €74,999	11.8%	21.5%
Education level		
No studies	0.7%	4.8%
Primary education	3.3%	2.8%
Secondary education	16.3%	23.1%
Higher education	79.7%	69.3%



5 IN 10 TOURISTS ARE REPEATERS

44 YEARS OLD

AVERAGE AGE

46% ONLY WITH PARTNER



Pictures: Freepik.com