

Tourist profile trend (2016)

Canary Islands: Italian market

How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	220,865	225,791	269,633	339,125	427,746
Average daily expenditure (€)	120.28	122.75	124.58	123.89	134.24
- in their place of residence	82.01	84.79	83.87	83.55	90.34
- in the Canary Islands	38.27	37.96	40.71	40.34	43.89
Average length of stay	10.66	10.49	11.62	10.41	9.73
Turnover per tourist (€)	1,079	1,078	1,163	1,085	1,125
Total turnover (> 16 years old) (€m)	238	243	314	368	481
Italian turnover: year on year change	--	2.1%	28.8%	17.4%	30.7%
Italian tourist arrivals: year on year change	--	2.2%	19.4%	25.8%	26.1%

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

Accommodation (**):	50.20	55.03	75.78	68.32	79.78
- Accommodation	43.47	48.48	68.79	60.69	69.22
- Additional accommodation expenses	6.73	6.55	6.99	7.63	10.56
Transport:	38.22	40.34	41.38	41.32	39.53
- Public transport	5.80	9.69	9.96	7.17	10.34
- Taxi	7.42	5.73	4.09	5.15	5.20
- Car rental	25.01	24.92	27.33	29.00	23.98
Food and drink:	120.99	132.65	151.68	168.09	148.29
- Food purchases at supermarkets	53.83	60.36	78.31	87.31	62.98
- Restaurants	67.16	72.29	73.37	80.77	85.31
Souvenirs:	72.00	74.49	73.08	52.92	56.23
Leisure:	44.24	43.43	52.14	38.85	45.19
- Organized excursions	18.17	14.75	23.25	14.60	18.02
- Leisure, amusement	6.98	6.68	6.74	5.09	4.44
- Trip to other islands	3.14	3.15	2.12	2.48	3.12
- Sporting activities	5.26	4.49	8.20	5.56	5.48
- Cultural activities	1.82	1.59	1.68	2.46	3.07
- Discos and disco-pubs	8.88	12.77	10.15	8.66	11.05
Others:	27.83	15.51	14.20	11.61	13.32
- Wellness	5.57	2.52	2.58	2.04	2.01
- Medical expenses	1.48	0.87	1.16	1.25	1.29
- Other expenses	20.78	12.13	10.46	8.32	10.02

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.2%	0.5%	1.1%	1.0%	0.7%
Between 2 and 7 days	14.5%	11.7%	8.8%	9.4%	6.9%
Between 8 and 15 days	12.7%	15.8%	13.6%	10.7%	10.4%
Between 16 and 30 days	22.4%	20.9%	24.1%	20.9%	19.3%
Between 31 and 90 days	33.7%	32.8%	35.3%	36.1%	39.5%
More than 90 days	16.6%	18.2%	17.1%	22.0%	23.3%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	19.8%	19.4%	23.0%	21.7%	16.4%
Flight and accommodation (room only)	19.4%	20.6%	20.8%	28.4%	30.5%
Flight and accommodation (B&B)	3.1%	3.8%	4.6%	6.5%	5.2%
Flight and accommodation (half board)	13.4%	12.2%	13.2%	12.6%	14.0%
Flight and accommodation (full board)	15.8%	14.1%	11.8%	7.9%	8.9%
Flight and accommodation (all inclusive)	28.5%	29.9%	26.6%	22.8%	24.9%
% Tourists using low-cost airlines	63.5%	58.6%	66.6%	75.7%	72.4%
Other expenses in their place of residence:					
- Car rental	16.1%	16.4%	18.4%	24.2%	22.4%
- Sporting activities	4.2%	4.0%	5.0%	4.8%	2.7%
- Excursions	2.5%	4.5%	4.0%	5.4%	6.5%
- Trip to other islands	1.5%	1.8%	2.1%	2.0%	1.9%

(*) 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?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	33.1%	29.2%	24.7%	20.7%	25.2%
- Tour Operator's website	51.2%	52.4%	61.8%	69.4%	71.0%
Accommodation	16.9%	16.4%	18.3%	22.5%	19.0%
- Accommodation's website	85.9%	78.1%	74.7%	79.0%	85.6%
Travel agency (High street)	23.8%	26.7%	23.9%	19.3%	21.6%
Online Travel Agency (OTA)	14.5%	16.4%	21.4%	25.6%	26.3%
No need to book accommodation	11.8%	11.3%	11.6%	11.9%	7.9%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	35.7%	29.4%	27.2%	23.4%	25.7%
- Tour Operator's website	52.9%	51.7%	61.4%	64.4%	66.6%
Airline	31.5%	34.9%	38.2%	43.1%	40.1%
- Airline's website	98.1%	97.0%	96.7%	98.1%	98.3%
Travel agency (High street)	24.4%	26.9%	25.2%	19.9%	21.8%
Online Travel Agency (OTA)	8.4%	8.8%	9.4%	13.6%	12.4%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	3.4%	4.3%	4.1%	4.0%	4.2%
4* Hotel	44.2%	42.5%	36.9%	29.9%	34.8%
1-2-3* Hotel	13.4%	15.1%	13.9%	15.1%	14.0%
Apartment	27.2%	24.4%	29.8%	35.1%	37.1%
Property (privately-owned, friends, family)	9.8%	10.9%	12.0%	12.5%	6.8%
Others	2.0%	2.8%	3.3%	3.4%	3.1%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	55.3%	51.9%	53.4%	51.3%	55.3%
Percentage of women	44.7%	48.1%	46.6%	48.7%	44.7%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	41.1	39.5	40.2	41.4	42.1
Standard deviation	13.9	13.6	13.2	13.5	14.6

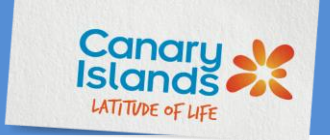
	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	10.9%	12.5%	9.7%	8.5%	10.6%
25-30 years old	16.8%	19.0%	20.2%	18.9%	16.6%
31-45 years old	36.4%	39.3%	36.0%	37.9%	33.8%
46-60 years old	25.5%	20.4%	25.2%	24.4%	26.4%
Over 60 years old	10.4%	8.8%	8.9%	10.3%	12.5%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	26.7%	29.1%	33.8%	31.7%	27.0%
Upper/Middle management employee	31.9%	31.0%	28.8%	34.0%	31.5%
Auxiliary level employee	20.3%	17.9%	17.9%	16.3%	19.1%
Students	7.6%	7.6%	7.2%	7.0%	6.9%
Retired	10.2%	8.9%	7.3%	7.8%	10.4%
Unemployed / unpaid dom. work	3.2%	5.5%	5.0%	3.2%	5.2%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	34.7%	40.0%	34.9%	36.0%	35.3%
€24,001 - €36,000	26.0%	24.5%	24.2%	24.8%	26.3%
€36,001 - €48,000	14.9%	15.3%	16.8%	16.9%	14.1%
€48,001 - €60,000	10.2%	9.6%	9.3%	9.0%	9.1%
€60,001 - €72,000	4.6%	3.4%	4.9%	4.4%	4.4%
€72,001 - €84,000	2.7%	2.5%	1.9%	3.0%	2.2%
More than €84,000	7.0%	4.9%	8.1%	6.0%	8.4%

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Which island do they choose?



Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	28,717	25,400	26,609	30,745	49,252
- Fuerteventura	52,406	60,416	58,670	80,227	104,311
- Gran Canaria	40,528	42,567	58,282	66,565	83,314
- Tenerife	96,893	95,220	123,421	159,199	188,451
- La Palma	584	2,009	1,443	1,892	1,300

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	13.1%	11.3%	9.9%	9.1%	11.5%
- Fuerteventura	23.9%	26.8%	21.9%	23.7%	24.5%
- Gran Canaria	18.5%	18.9%	21.7%	19.7%	19.5%
- Tenerife	44.2%	42.2%	46.0%	47.0%	44.2%
- La Palma	0.3%	0.9%	0.5%	0.6%	0.3%

Who do they come with?



Why do they choose the Canary Islands?



	2012	2013	2014	2015	2016
Unaccompanied	11.0%	11.5%	14.1%	12.5%	11.5%
Only with partner	51.0%	46.0%	46.5%	45.4%	47.3%
Only with children (under the age of 13)	0.9%	0.7%	0.7%	0.8%	1.5%
Partner + children (under the age of 13)	7.7%	7.4%	7.3%	7.8%	7.9%
Other relatives	6.1%	6.6%	5.2%	6.7%	6.3%
Friends	9.6%	11.3%	12.4%	11.9%	9.9%
Work colleagues	0.4%	0.7%	0.8%	0.5%	0.6%
Other combinations ⁽¹⁾	13.3%	15.8%	13.1%	14.3%	15.0%

Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	82.8%	83.6%	85.1%	83.7%	83.9%
Beaches	36.7%	37.0%	35.1%	38.1%	39.8%
Tranquillity/rest/relaxation	35.7%	36.7%	34.4%	33.7%	32.7%
Scenery	25.4%	25.9%	25.6%	31.0%	29.0%
Visiting new places	18.5%	17.4%	19.3%	20.0%	20.0%
Price	21.3%	19.6%	18.2%	16.2%	14.7%
Quality of the environment	8.6%	13.2%	10.3%	12.7%	12.1%
Security	7.6%	6.5%	5.4%	7.9%	9.6%
Active tourism	5.1%	4.8%	6.5%	4.8%	5.0%
Ease of travel	3.2%	3.4%	2.1%	2.9%	4.0%
Nightlife/fun	1.9%	4.0%	4.0%	2.6%	2.7%
Suitable destination for children	4.0%	3.0%	2.9%	2.7%	2.6%
Theme parks	1.5%	1.9%	1.3%	1.4%	2.4%
Nautical activities	1.3%	1.5%	3.0%	1.9%	1.7%
Culture	1.0%	1.4%	1.6%	1.3%	1.3%
Golf	1.5%	0.9%	1.5%	1.5%	1.1%

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

* Multi-choice question

How do they rate the destination?



Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	94.0%	93.7%	92.6%	92.9%	93.3%
Average rating (scale 1-10)	8.66	8.64	8.70	8.61	8.63

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	54.6%	52.7%	53.0%	51.0%	53.4%
In love (at least 10 previous visits)	6.2%	6.0%	7.0%	6.0%	6.0%

What did motivate them to come?



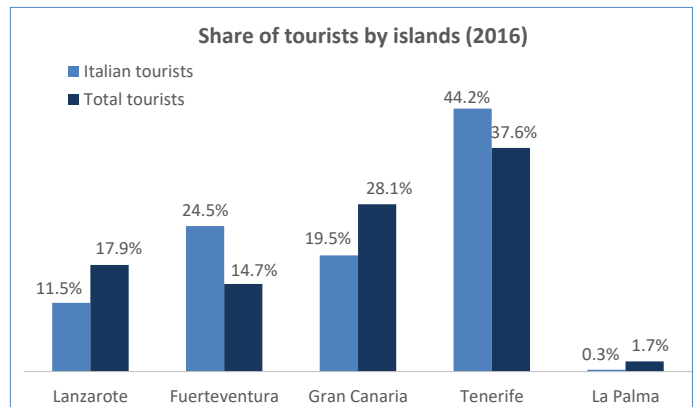
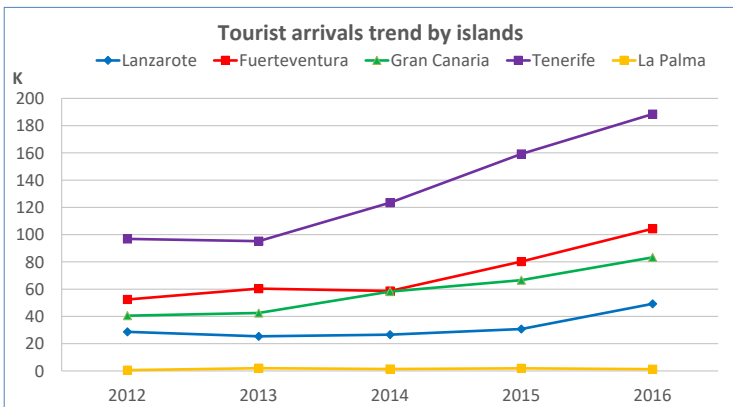
Where does the flight come from?



Ten main origin countries	2012	2013	2014	2015	2016
Italy	179,596	162,389	194,485	251,910	328,610
Spanish Mainland	35,383	58,804	67,553	75,556	88,977
Germany	3,539	2,244	3,145	6,069	4,381
United Kingdom	851	1,024	2,176	1,845	1,909
Switzerland	196	509	723	801	977
Belgium	573	0	197	150	703
Norway	0	0	0	0	635
Austria	392	252	0	594	621
Ireland	0	0	0	273	286
France	0	0	325	517	222

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	46.2%	44.5%	41.6%	43.3%	43.1%
Recommendation by friends or relatives	40.1%	42.1%	44.7%	47.2%	43.4%
The Canary Islands television channel	0.0%	0.6%	0.7%	1.1%	0.4%
Other television or radio channels	0.7%	0.5%	1.4%	1.1%	2.3%
Information in the press/magazines/books	8.5%	8.1%	8.4%	9.5%	8.8%
Attendance at a tourism fair	0.4%	0.6%	0.7%	0.2%	0.7%
Tour Operator's brochure or catalogue	9.2%	10.7%	8.5%	4.9%	6.5%
Recommendation by Travel Agency	16.2%	17.2%	14.2%	11.5%	13.7%
Information obtained via the Internet	31.1%	29.4%	29.7%	31.1%	32.0%
Senior Tourism programme	0.2%	0.3%	0.3%	0.2%	0.5%
Others	4.6%	5.4%	4.1%	4.0%	3.8%

* 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.