

Tourist profile trend (2016)

Italy: Fourth Quarter

How many are they and how much do they spend?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	43,899	57,901	69,604	82,952	106,992
Average daily expenditure (€)	119.96	131.21	110.10	128.07	134.75
. in their place of residence	76.74	90.73	68.79	89.53	88.08
. in the Canary Islands	43.21	40.48	41.30	38.54	46.67
Average length of stay	9.29	9.40	13.41	9.71	9.15
Turnover per tourist (€)	1,024	1,075	1,198	1,030	1,070
Total turnover (> 16 years old) (€m)	44.9	62.3	83.4	85.5	114
Share of total turnover	18.9%	25.6%	26.6%	23.2%	23.8%
Share of total tourist	19.9%	25.6%	25.8%	24.5%	25.0%

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

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation (**):	41.80	45.99	95.98	61.27	83.35
- Accommodation	38.39	42.09	88.80	56.04	71.26
- Additional accommodation expenses	3.41	3.89	7.18	5.23	12.08
Transport:	43.82	39.85	39.91	35.68	37.52
- Public transport	8.73	13.46	8.62	6.28	9.29
- Taxi	6.06	5.36	2.43	4.30	5.55
- Car rental	29.03	21.03	28.86	25.11	22.67
Food and drink:	123.26	139.87	143.36	149.49	133.50
- Food purchases at supermarkets	50.05	64.92	67.59	64.90	57.47
- Restaurants	73.21	74.95	75.77	84.59	76.03
Souvenirs:	67.98	80.53	71.97	54.69	62.08
Leisure:	40.89	37.23	78.84	38.04	45.69
- Organized excursions	17.24	10.92	46.00	19.25	15.32
- Leisure, amusement	4.72	8.00	7.09	4.37	6.12
- Trip to other islands	1.99	0.53	2.19	0.96	2.05
- Sporting activities	9.40	3.29	7.71	4.00	4.96
- Cultural activities	1.39	1.05	1.61	2.49	3.95
- Discos and disco-pubs	6.15	13.44	14.24	6.97	13.30
Others:	29.84	11.74	11.80	9.88	21.47
- Wellness	14.40	1.23	2.47	1.56	1.28
- Medical expenses	1.08	0.74	1.74	1.15	1.01
- Other expenses	14.36	9.78	7.59	7.18	19.18

How far in advance do they book their trip?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.0%	0.4%	0.9%	0.0%	1.0%
Between 2 and 7 days	19.6%	10.6%	9.1%	13.7%	5.5%
Between 8 and 15 days	16.9%	14.3%	17.8%	10.9%	10.5%
Between 16 and 30 days	22.2%	23.6%	23.1%	24.6%	22.9%
Between 31 and 90 days	28.0%	38.7%	38.2%	33.1%	40.0%
More than 90 days	13.3%	12.4%	10.9%	17.6%	20.1%

What do they book at their place of residence?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	19.3%	19.4%	27.3%	19.0%	14.4%
Flight and accommodation (room only)	20.7%	19.1%	22.8%	24.4%	31.9%
Flight and accommodation (B&B)	4.1%	5.9%	4.8%	8.5%	5.9%
Flight and accommodation (half board)	13.6%	11.8%	13.9%	9.8%	12.8%
Flight and accommodation (full board)	13.0%	15.5%	9.3%	12.6%	11.2%
Flight and accommodation (all inclusive)	29.2%	28.3%	21.9%	25.8%	23.8%
% Tourists using low-cost airlines	63.9%	60.6%	83.8%	76.3%	73.4%
Other expenses in their place of residence:					
- Car rental	22.0%	14.3%	22.6%	23.5%	19.8%
- Sporting activities	4.5%	2.2%	2.0%	5.4%	2.3%
- Excursions	1.9%	6.6%	4.7%	4.0%	6.2%
- Trip to other islands	2.0%	1.5%	2.8%	2.0%	1.8%

How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Accommodation booking					
Tour Operator	28.6%	29.1%	17.7%	25.5%	22.7%
- Tour Operator's website	67.9%	52.5%	54.5%	80.0%	72.3%
Accommodation	20.4%	14.1%	25.0%	16.1%	17.9%
- Accommodation's website	82.1%	85.0%	75.1%	90.0%	91.9%
Travel agency (High street)	25.2%	28.1%	21.7%	27.7%	26.6%
Online Travel Agency (OTA)	18.0%	16.1%	26.2%	18.7%	26.8%
No need to book accommodation	7.8%	12.7%	9.4%	12.0%	6.0%

Flight booking

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tour Operator	30.0%	29.4%	20.9%	25.6%	23.8%
- Tour Operator's website	69.4%	47.7%	57.0%	67.6%	66.4%
Airline	33.9%	32.1%	46.2%	37.4%	42.0%
- Airline's website	100.0%	97.6%	98.8%	96.4%	98.0%
Travel agency (High street)	27.5%	30.3%	21.6%	25.3%	23.6%
Online Travel Agency (OTA)	8.6%	8.2%	11.3%	11.8%	10.6%

Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	1.8%	2.7%	0.6%	1.7%	2.9%
4* Hotel	43.6%	46.2%	38.0%	38.0%	38.2%
1-2-3* Hotel	14.3%	14.1%	9.8%	18.2%	11.6%
Apartment	29.9%	21.3%	35.9%	26.5%	37.9%
Property (privately-owned, friends, family)	8.2%	10.9%	11.0%	12.6%	5.3%
Others	2.3%	4.8%	4.6%	3.0%	4.0%

Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Gender					
Percentage of men	53.7%	50.9%	51.9%	52.1%	52.7%
Percentage of women	46.3%	49.1%	48.1%	47.9%	47.3%

Age

Average age (tourists > 16 years old)	38.1	38.7	39.1	41.8	41.4
Standard deviation	13.3	12.5	12.7	14.5	14.1

Age range (> 16 years old)

16-24 years old	11.7%	12.6%	10.4%	10.7%	12.7%
25-30 years old	24.9%	18.4%	20.8%	18.8%	14.8%
31-45 years old	36.1%	43.1%	36.5%	33.1%	35.0%
46-60 years old	20.8%	20.6%	24.8%	25.6%	26.2%
Over 60 years old	6.4%	5.4%	7.4%	11.7%	11.3%

Occupation

Business owner or self-employed	28.6%	33.1%	37.5%	29.7%	28.8%
Upper/Middle management employee	29.9%	31.5%	26.8%	31.7%	33.1%
Auxiliary level employee	19.6%	13.8%	16.8%	15.3%	15.8%
Students	8.2%	6.2%	6.6%	9.9%	5.6%
Retired	7.3%	7.2%	6.7%	10.6%	9.3%
Unemployed / unpaid dom. work	6.4%	8.1%	5.5%	2.8%	7.5%

Annual household income level

€12,000 - €24,000	41.2%	49.5%	45.1%	30.0%	37.5%
€24,001 - €36,000	22.8%	18.2%	23.3%	34.9%	23.6%
€36,001 - €48,000	16.6%	16.6%	14.8%	18.0%	15.2%
€48,001 - €60,000	7.4%	8.6%	7.4%	7.7%	10.6%
€60,001 - €72,000	6.6%	2.8%	3.6%	1.6%	2.9%
€72,001 - €84,000	1.1%	0.8%	1.3%	2.6%	2.6%
More than €84,000	4.3%	3.4%	4.3%	5.1%	7.5%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	5,078	5,146	6,456	7,993	13,855
- Fuerteventura	9,625	14,676	13,353	22,079	23,977
- Gran Canaria	8,302	13,330	16,167	19,935	24,580
- Tenerife	20,133	24,345	33,246	32,647	44,480
- La Palma	178	404	382	298	100

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	11.7%	8.9%	9.3%	9.6%	12.9%
- Fuerteventura	22.2%	25.3%	19.2%	26.6%	22.4%
- Gran Canaria	19.2%	23.0%	23.2%	24.0%	23.0%
- Tenerife	46.5%	42.0%	47.8%	39.4%	41.6%
- La Palma	0.4%	0.7%	0.5%	0.4%	0.1%

Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	9.3%	12.7%	17.4%	15.1%	13.0%
Only with partner	50.7%	51.3%	49.9%	45.0%	46.3%
Only with children (under the age of 13)	0.0%	0.4%	0.0%	0.7%	1.4%
Partner + children (under the age of 13)	6.0%	8.5%	5.6%	6.2%	8.4%
Other relatives	7.0%	5.0%	4.5%	8.1%	9.7%
Friends	14.0%	7.7%	9.3%	12.1%	8.7%
Work colleagues	0.5%	0.3%	1.7%	0.0%	0.4%
Other combinations ⁽¹⁾	12.5%	14.0%	11.7%	12.8%	12.2%

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

How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	95.1%	92.8%	96.2%	94.7%	92.2%
Average rating (scale 1-10)	8.75	8.64	9.02	8.73	8.66

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	48.9%	48.6%	58.2%	54.8%	54.6%
In love (at least 10 previous visits)	5.4%	5.7%	4.5%	6.6%	4.4%

Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Italy	82.0%	75.5%	83.5%	77.7%	79.7%
Spanish Mainland	17.1%	22.7%	15.5%	20.7%	17.5%
Germany	0.0%	0.9%	0.5%	0.9%	1.9%
Norway	0.0%	0.0%	0.0%	0.0%	0.4%
Belgium	0.0%	0.0%	0.0%	0.0%	0.2%
Austria	0.5%	0.4%	0.0%	0.3%	0.0%
United Kingdom	0.0%	0.4%	0.0%	0.3%	0.0%
Switzerland	0.4%	0.0%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.0%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	84.3%	88.6%	86.1%	93.4%	88.0%
Beaches	35.1%	33.1%	30.0%	38.1%	38.6%
Tranquillity/rest/relaxation	30.6%	38.3%	36.9%	32.0%	36.9%
Scenery	21.8%	22.6%	25.9%	28.7%	23.3%
Visiting new places	15.7%	14.1%	18.5%	16.5%	21.6%
Price	24.8%	19.4%	22.0%	16.2%	16.1%
Quality of the environment	7.3%	17.0%	9.2%	10.8%	12.4%
Security	8.3%	9.2%	3.7%	10.9%	8.8%
Active tourism	4.4%	4.4%	8.7%	5.5%	5.0%
Ease of travel	6.1%	3.3%	2.5%	2.4%	3.4%
Theme parks	0.0%	2.8%	1.7%	0.9%	3.2%
Nautical activities	2.2%	1.8%	2.9%	2.2%	2.2%
Suitable destination for children	4.7%	3.5%	1.3%	2.1%	2.2%
Nightlife/fun	2.5%	4.8%	4.2%	4.1%	1.9%
Culture	1.7%	1.0%	0.7%	0.9%	1.5%
Health-related tourism	2.1%	0.8%	0.3%	0.9%	1.2%

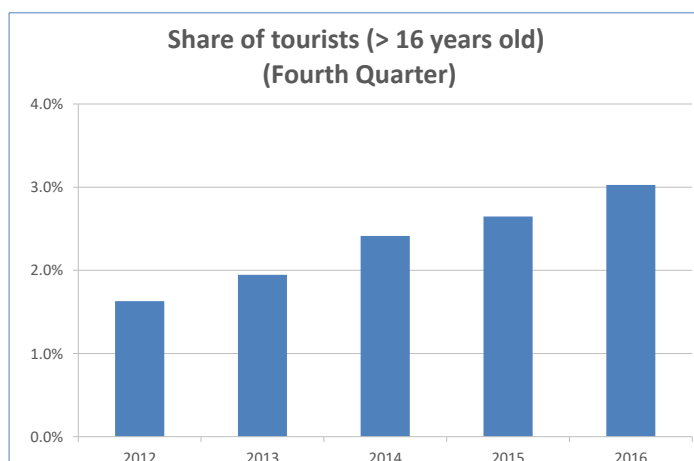
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	40.8%	42.6%	43.9%	48.6%	45.6%
Recommendation by friends or relatives	44.4%	46.2%	49.4%	46.5%	42.8%
The Canary Islands television channel	0.0%	0.7%	0.6%	1.1%	0.3%
Other television or radio channels	0.8%	0.0%	2.2%	0.8%	2.8%
Information in the press/magazines/books	8.1%	7.2%	9.8%	7.4%	8.5%
Attendance at a tourism fair	0.4%	0.8%	0.6%	0.7%	0.3%
Tour Operator's brochure or catalogue	7.8%	9.0%	6.2%	4.4%	6.5%
Recommendation by Travel Agency	17.2%	20.3%	13.0%	15.3%	14.4%
Information obtained via the Internet	33.6%	34.2%	31.0%	28.8%	33.1%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	4.5%	7.2%	4.5%	4.0%	4.4%

* 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.