

Tourist profile trend (2016)

Italy: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	60,527	50,145	63,672	83,424	98,504
Average daily expenditure (€)	120.14	116.04	128.33	115.75	130.78
. in their place of residence	80.38	76.87	84.13	74.44	91.20
. in the Canary Islands	39.75	39.17	44.20	41.31	39.58
Average length of stay	10.56	11.36	12.17	11.47	10.30
Turnover per tourist (€)	1,047	1,084	1,194	1,056	1,116
Total turnover (> 16 years old) (€m)	63.3	54.4	76.0	88.1	110
Share of total turnover	26.6%	22.3%	24.2%	23.9%	22.8%
Share of total tourist	27.4%	22.2%	23.6%	24.6%	23.0%

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

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation (**):	66.29	67.64	84.38	79.87	80.83
- Accommodation	55.14	58.04	75.50	74.27	66.66
- Additional accommodation expenses	11.14	9.60	8.88	5.61	14.17
Transport:	29.91	38.85	41.33	39.87	37.41
- Public transport	3.28	10.68	10.91	7.50	11.32
- Taxi	6.94	5.97	4.44	6.76	4.25
- Car rental	19.70	22.20	25.98	25.62	21.85
Food and drink:	124.65	145.61	192.81	180.48	148.63
- Food purchases at supermarkets	51.48	59.82	102.83	106.05	67.04
- Restaurants	73.18	85.79	89.98	74.42	81.58
Souvenirs:	83.55	82.98	73.11	49.22	54.33
Leisure:	27.15	42.85	33.59	31.83	31.53
- Organized excursions	11.95	10.68	10.32	10.42	12.15
- Leisure, amusement	5.00	6.41	5.77	5.74	2.75
- Trip to other islands	1.44	6.43	0.67	1.20	2.54
- Sporting activities	1.79	7.05	5.65	6.26	4.61
- Cultural activities	1.82	1.29	1.09	2.43	1.47
- Discos and disco-pubs	5.16	11.00	10.09	5.79	8.02
Others:	28.98	21.42	25.01	13.59	10.92
- Wellness	1.62	4.14	4.69	1.56	1.92
- Medical expenses	0.82	1.28	0.90	3.15	1.61
- Other expenses	26.54	16.00	19.42	8.88	7.39

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.4%	1.3%	2.0%	0.6%	0.3%
Between 2 and 7 days	16.8%	11.7%	7.5%	7.9%	7.3%
Between 8 and 15 days	12.9%	17.6%	11.5%	7.1%	14.0%
Between 16 and 30 days	26.5%	27.5%	32.4%	18.3%	23.5%
Between 31 and 90 days	34.9%	25.5%	31.5%	43.6%	34.6%
More than 90 days	8.5%	16.4%	15.1%	22.5%	20.2%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	25.7%	24.8%	30.4%	28.2%	19.9%
Flight and accommodation (room only)	15.5%	21.6%	18.8%	34.5%	30.3%
Flight and accommodation (B&B)	2.7%	2.6%	8.0%	6.9%	8.1%
Flight and accommodation (half board)	10.9%	11.4%	11.3%	10.7%	11.7%
Flight and accommodation (full board)	19.4%	14.5%	9.3%	7.1%	8.6%
Flight and accommodation (all inclusive)	25.9%	25.0%	22.2%	12.6%	21.4%
% Tourists using low-cost airlines	72.3%	58.1%	62.8%	72.1%	80.7%

Other expenses in their place of residence:

- Car rental	14.2%	16.1%	16.7%	25.0%	22.1%
- Sporting activities	3.2%	3.5%	5.5%	1.6%	3.8%
- Excursions	1.2%	1.8%	1.8%	3.1%	5.4%
- Trip to other islands	1.3%	1.0%	2.1%	1.5%	1.7%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	30.9%	25.3%	23.9%	12.5%	27.1%
- Tour Operator's website	54.2%	68.7%	72.4%	78.4%	72.2%
Accommodation	18.5%	17.1%	20.6%	29.1%	19.5%
- Accommodation's website	85.1%	63.1%	71.5%	70.1%	86.6%
Travel agency (High street)	18.5%	29.6%	20.7%	13.8%	17.1%
Online Travel Agency (OTA)	14.8%	14.7%	16.2%	29.0%	24.7%
No need to book accommodation	17.4%	13.3%	18.6%	15.5%	11.6%

Flight booking

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tour Operator	39.2%	28.0%	27.4%	20.5%	26.2%
- Tour Operator's website	56.9%	64.3%	78.2%	70.9%	78.8%
Airline	31.3%	34.0%	42.9%	51.6%	42.9%
- Airline's website	99.8%	100.0%	93.8%	98.8%	98.9%
Travel agency (High street)	18.3%	29.2%	24.5%	16.6%	19.1%
Online Travel Agency (OTA)	11.2%	8.8%	5.2%	11.3%	11.8%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	1.9%	5.7%	5.4%	4.3%	4.7%
4* Hotel	43.9%	39.9%	33.5%	24.8%	30.4%
1-2-3* Hotel	13.7%	17.8%	15.1%	6.9%	14.9%
Apartment	26.1%	21.4%	25.6%	43.5%	36.6%
Property (privately-owned, friends, family)	13.1%	13.1%	16.5%	15.1%	10.1%
Others	1.4%	2.0%	3.8%	5.4%	3.3%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	59.4%	51.5%	60.7%	57.5%	58.0%
Percentage of women	40.6%	48.5%	39.3%	42.5%	42.0%

Age

Average age (tourists > 16 years old)	44.6	44.1	45.8	45.4	45.4
Standard deviation	14.0	15.2	14.7	13.6	14.6

Age range (> 16 years old)

16-24 years old	8.3%	9.6%	5.9%	1.7%	4.2%
25-30 years old	9.1%	12.0%	11.3%	16.2%	15.6%
31-45 years old	37.4%	36.9%	36.0%	36.2%	34.3%
46-60 years old	29.4%	23.1%	27.0%	29.3%	27.7%
Over 60 years old	15.7%	18.4%	19.8%	16.6%	18.2%

Occupation

Business owner or self-employed	31.7%	27.1%	37.7%	34.3%	31.0%
Upper/Middle management employee	29.2%	26.5%	26.3%	32.5%	25.6%
Auxiliary level employee	15.0%	19.0%	11.0%	14.1%	16.1%
Students	6.3%	7.0%	4.2%	4.3%	5.3%
Retired	15.0%	16.6%	15.1%	12.2%	17.2%
Unemployed / unpaid dom. work	2.9%	3.8%	5.7%	2.6%	4.7%

Annual household income level

€12,000 - €24,000	34.3%	29.1%	25.6%	31.9%	30.4%
€24,001 - €36,000	24.2%	33.6%	25.3%	26.3%	30.3%
€36,001 - €48,000	15.5%	18.3%	19.2%	15.4%	14.4%
€48,001 - €60,000	11.9%	9.2%	11.9%	9.7%	6.7%
€60,001 - €72,000	4.0%	3.0%	4.6%	5.8%	5.1%
€72,001 - €84,000	1.9%	3.0%	3.1%	4.2%	3.6%
More than €84,000	8.1%	3.8%	10.3%	6.8%	9.6%

(*) 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.

Tourist profile trend (2016)

Italy: First Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	6,010	3,846	3,999	5,382	8,931
- Fuerteventura	11,026	9,337	10,290	12,700	18,011
- Gran Canaria	13,861	11,972	17,839	17,090	21,450
- Tenerife	28,802	23,573	31,261	47,454	48,831
- La Palma	118	1,239	92	799	600

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	10.0%	7.7%	6.3%	6.5%	9.1%
- Fuerteventura	18.4%	18.7%	16.2%	15.2%	18.4%
- Gran Canaria	23.2%	24.0%	28.1%	20.5%	21.9%
- Tenerife	48.1%	47.2%	49.2%	56.9%	49.9%
- La Palma	0.2%	2.5%	0.1%	1.0%	0.6%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	14.6%	14.0%	16.8%	11.1%	12.6%
Only with partner	44.6%	33.9%	41.3%	48.2%	42.9%
Only with children (under the age of 13)	0.6%	1.0%	1.4%	0.8%	2.8%
Partner + children (under the age of 13)	8.1%	8.3%	8.5%	8.2%	8.6%
Other relatives	8.5%	11.5%	5.5%	7.7%	5.0%
Friends	9.4%	12.6%	10.9%	11.7%	9.8%
Work colleagues	0.0%	1.0%	0.0%	0.7%	1.0%
Other combinations ⁽¹⁾	14.1%	17.6%	15.6%	11.6%	17.4%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	93.8%	95.3%	91.0%	94.6%	95.2%
Average rating (scale 1-10)	8.58	8.69	8.48	8.45	8.79

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	64.7%	67.3%	65.4%	61.0%	62.2%
In love (at least 10 previous visits)	5.3%	8.7%	12.0%	8.8%	6.7%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Italy	81.0%	73.0%	63.4%	68.3%	81.7%
Spanish Mainland	13.5%	25.8%	31.9%	27.0%	14.1%
Germany	4.5%	0.3%	2.2%	2.5%	1.4%
United Kingdom	0.6%	0.0%	1.5%	0.7%	1.3%
Austria	0.0%	0.0%	0.0%	0.4%	0.4%
Belgium	0.5%	0.0%	0.0%	0.0%	0.3%
Ireland	0.0%	0.0%	0.0%	0.0%	0.3%
Switzerland	0.0%	0.2%	0.0%	0.8%	0.2%
Norway	0.0%	0.0%	0.0%	0.0%	0.2%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.1%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	86.2%	90.5%	91.2%	83.8%	88.8%
Tranquillity/rest/relaxation	37.2%	39.0%	30.6%	30.3%	29.1%
Beaches	23.9%	25.2%	28.5%	30.9%	29.1%
Scenery	23.1%	20.3%	22.9%	30.3%	26.0%
Price	21.1%	18.2%	17.4%	17.6%	15.1%
Quality of the environment	9.0%	14.9%	14.4%	10.5%	14.3%
Security	9.2%	6.9%	5.5%	9.3%	13.8%
Visiting new places	16.5%	12.1%	10.4%	17.5%	13.4%
Ease of travel	2.7%	5.0%	4.0%	4.6%	6.2%
Active tourism	3.8%	6.1%	6.4%	3.1%	5.5%
Suitable destination for children	3.2%	3.8%	2.5%	2.8%	3.1%
Theme parks	2.3%	2.0%	0.0%	1.5%	2.1%
Nautical activities	1.6%	1.3%	2.2%	2.4%	1.9%
Golf	2.2%	1.8%	1.6%	2.7%	1.8%
Nightlife/fun	1.3%	3.3%	3.8%	1.9%	1.8%
Culture	0.0%	1.4%	3.0%	1.0%	1.4%

* Multi-choice question

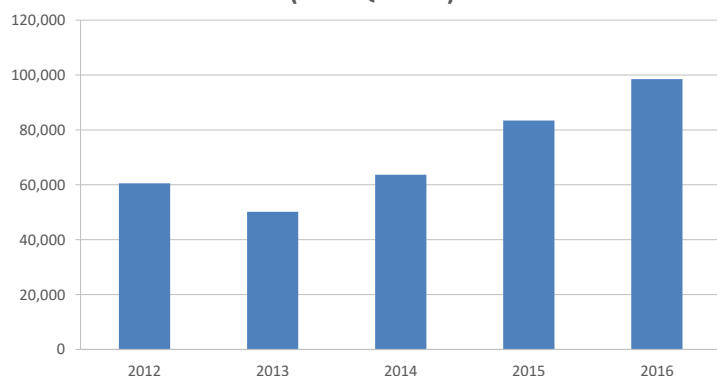
What did motivate them to come?



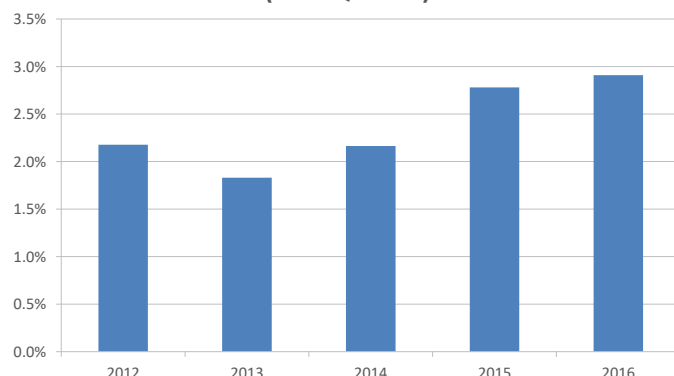
Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	58.0%	56.7%	52.9%	52.6%	51.6%
Recommendation by friends or relatives	42.4%	38.3%	39.1%	42.5%	40.4%
The Canary Islands television channel	0.0%	0.4%	1.1%	1.2%	0.5%
Other television or radio channels	0.3%	0.4%	0.9%	0.2%	3.1%
Information in the press/magazines/books	6.6%	8.8%	8.5%	11.7%	7.0%
Attendance at a tourism fair	0.0%	0.9%	1.4%	0.0%	1.0%
Tour Operator's brochure or catalogue	6.3%	4.3%	4.8%	3.7%	3.0%
Recommendation by Travel Agency	13.8%	15.9%	10.7%	5.9%	10.9%
Information obtained via the Internet	24.4%	19.6%	23.2%	28.0%	25.5%
Senior Tourism programme	0.0%	0.4%	0.4%	0.0%	0.3%
Others	6.4%	4.3%	2.3%	3.3%	4.0%

* Multi-choice question

Tourist arrivals trend (> 16 years old)
(First Quarter)



Share of tourists (> 16 years old)
(First Quarter)



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.