

# Tourist profile trend (2017)

## Italy: First Quarter

### How many are they and how much do they spend?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	50,145	63,672	83,424	98,504	116,441
Average daily expenditure (€)	116.04	128.33	115.75	130.78	138.05
. in their place of residence	76.87	84.13	74.44	91.20	92.60
. in the Canary Islands	39.17	44.20	41.31	39.58	45.45
Average length of stay	11.36	12.17	11.47	10.30	9.86
Turnover per tourist (€)	1,084	1,194	1,056	1,116	1,090
Total turnover (> 16 years old) (€m)	54.4	76.0	88.1	110	127
Share of total turnover	22.3%	24.2%	23.9%	22.8%	--
Share of total tourist	22.2%	23.6%	24.6%	23.0%	--

Expenditure in the Canary Islands per tourist and trip (€) (*)					
<b>Accommodation (**):</b>	67.64	84.38	79.87	80.83	65.38
- Accommodation	58.04	75.50	74.27	66.66	60.44
- Additional accommodation expenses	9.60	8.88	5.61	14.17	4.94
<b>Transport:</b>	38.85	41.33	39.87	37.41	33.76
- Public transport	10.68	10.91	7.50	11.32	7.59
- Taxi	5.97	4.44	6.76	4.25	4.14
- Car rental	22.20	25.98	25.62	21.85	22.02
<b>Food and drink:</b>	145.61	192.81	180.48	148.63	184.08
- Food purchases at supermarkets	59.82	102.83	106.05	67.04	80.56
- Restaurants	85.79	89.98	74.42	81.58	103.53
<b>Souvenirs:</b>	82.98	73.11	49.22	54.33	58.36
<b>Leisure:</b>	42.85	33.59	31.83	31.53	31.43
- Organized excursions	10.68	10.32	10.42	12.15	9.19
- Leisure, amusement	6.41	5.77	5.74	2.75	4.33
- Trip to other islands	6.43	0.67	1.20	2.54	2.90
- Sporting activities	7.05	5.65	6.26	4.61	6.53
- Cultural activities	1.29	1.09	2.43	1.47	1.78
- Discos and disco-pubs	11.00	10.09	5.79	8.02	6.71
<b>Others:</b>	21.42	25.01	13.59	10.92	7.06
- Wellness	4.14	4.69	1.56	1.92	0.61
- Medical expenses	1.28	0.90	3.15	1.61	0.39
- Other expenses	16.00	19.42	8.88	7.39	6.06

### How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	1.3%	2.0%	0.6%	0.3%	0.5%
Between 2 and 7 days	11.7%	7.5%	7.9%	7.3%	6.2%
Between 8 and 15 days	17.6%	11.5%	7.1%	14.0%	13.0%
Between 16 and 30 days	27.5%	32.4%	18.3%	23.5%	19.2%
Between 31 and 90 days	25.5%	31.5%	43.6%	34.6%	38.9%
More than 90 days	16.4%	15.1%	22.5%	20.2%	22.2%

### What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	24.8%	30.4%	28.2%	19.9%	22.1%
Flight and accommodation (room only)	21.6%	18.8%	34.5%	30.3%	29.2%
Flight and accommodation (B&B)	2.6%	8.0%	6.9%	8.1%	6.1%
Flight and accommodation (half board)	11.4%	11.3%	10.7%	11.7%	13.2%
Flight and accommodation (full board)	14.5%	9.3%	7.1%	8.6%	9.5%
Flight and accommodation (all inclusive)	25.0%	22.2%	12.6%	21.4%	20.0%
<b>% Tourists using low-cost airlines</b>	58.1%	62.8%	72.1%	80.7%	72.0%
<b>Other expenses in their place of residence:</b>					
- Car rental	16.1%	16.7%	25.0%	22.1%	25.9%
- Sporting activities	3.5%	5.5%	1.6%	3.8%	3.3%
- Excursions	1.8%	1.8%	3.1%	5.4%	6.2%
- Trip to other islands	1.0%	2.1%	1.5%	1.7%	1.3%

### How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Accommodation booking</b>					
<b>Tour Operator</b>	25.3%	23.9%	12.5%	27.1%	26.5%
- Tour Operator's website	68.7%	72.4%	78.4%	72.2%	75.8%
<b>Accommodation</b>	17.1%	20.6%	29.1%	19.5%	19.4%
- Accommodation's website	63.1%	71.5%	70.1%	86.6%	87.9%
<b>Travel agency (High street)</b>	29.6%	20.7%	13.8%	17.1%	19.5%
<b>Online Travel Agency (OTA)</b>	14.7%	16.2%	29.0%	24.7%	23.4%
<b>No need to book accommodation</b>	13.3%	18.6%	15.5%	11.6%	11.1%

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Flight booking</b>					
<b>Tour Operator</b>	28.0%	27.4%	20.5%	26.2%	20.7%
- Tour Operator's website	64.3%	78.2%	70.9%	78.8%	76.1%
<b>Airline</b>	34.0%	42.9%	51.6%	42.9%	44.4%
- Airline's website	100.0%	93.8%	98.8%	98.9%	97.1%
<b>Travel agency (High street)</b>	29.2%	24.5%	16.6%	19.1%	23.3%
<b>Online Travel Agency (OTA)</b>	8.8%	5.2%	11.3%	11.8%	11.7%

### Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	5.7%	5.4%	4.3%	4.7%	3.6%
4* Hotel	39.9%	33.5%	24.8%	30.4%	33.7%
1-2-3* Hotel	17.8%	15.1%	6.9%	14.9%	13.4%
Apartment	21.4%	25.6%	43.5%	36.6%	34.5%
Property (privately-owned, friends, family)	13.1%	16.5%	15.1%	10.1%	10.3%
Others	2.0%	3.8%	5.4%	3.3%	4.5%

### Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
<b>Gender</b>					
Percentage of men	51.5%	60.7%	57.5%	58.0%	55.3%
Percentage of women	48.5%	39.3%	42.5%	42.0%	44.7%

Age					
Average age (tourists > 16 years old)	44.1	45.8	45.4	45.4	44.5
Standard deviation	15.2	14.7	13.6	14.6	14.2

Age range (> 16 years old)					
16-24 years old	9.6%	5.9%	1.7%	4.2%	5.3%
25-30 years old	12.0%	11.3%	16.2%	15.6%	16.5%
31-45 years old	36.9%	36.0%	36.2%	34.3%	31.3%
46-60 years old	23.1%	27.0%	29.3%	27.7%	32.9%
Over 60 years old	18.4%	19.8%	16.6%	18.2%	14.1%

Occupation					
Business owner or self-employed	27.1%	37.7%	34.3%	31.0%	25.9%
Upper/Middle management employee	26.5%	26.3%	32.5%	25.6%	35.0%
Auxiliary level employee	19.0%	11.0%	14.1%	16.1%	18.8%
Students	7.0%	4.2%	4.3%	5.3%	3.5%
Retired	16.6%	15.1%	12.2%	17.2%	12.0%
Unemployed / unpaid dom. work	3.8%	5.7%	2.6%	4.7%	4.8%

Annual household income level					
€12,000 - €24,000	29.1%	25.6%	31.9%	30.4%	35.2%
€24,001 - €36,000	33.6%	25.3%	26.3%	30.3%	22.7%
€36,001 - €48,000	18.3%	19.2%	15.4%	14.4%	13.9%
€48,001 - €60,000	9.2%	11.9%	9.7%	6.7%	13.5%
€60,001 - €72,000	3.0%	4.6%	5.8%	5.1%	3.4%
€72,001 - €84,000	3.0%	3.1%	4.2%	3.6%	2.6%
More than €84,000	3.8%	10.3%	6.8%	9.6%	8.6%

(\*) 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 (2017)

### Italy: First Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	3,846	3,999	5,382	8,931	14,530
- Fuerteventura	9,337	10,290	12,700	18,011	19,437
- Gran Canaria	11,972	17,839	17,090	21,450	26,400
- Tenerife	23,573	31,261	47,454	48,831	55,729
- La Palma	1,239	92	799	600	344

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	7.7%	6.3%	6.5%	9.1%	12.5%
- Fuerteventura	18.7%	16.2%	15.2%	18.4%	16.7%
- Gran Canaria	24.0%	28.1%	20.5%	21.9%	22.7%
- Tenerife	47.2%	49.2%	56.9%	49.9%	47.9%
- La Palma	2.5%	0.1%	1.0%	0.6%	0.3%

#### Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	14.0%	16.8%	11.1%	12.6%	11.4%
Only with partner	33.9%	41.3%	48.2%	42.9%	42.7%
Only with children (under the age of 13)	1.0%	1.4%	0.8%	2.8%	2.1%
Partner + children (under the age of 13)	8.3%	8.5%	8.2%	8.6%	7.5%
Other relatives	11.5%	5.5%	7.7%	5.0%	7.0%
Friends	12.6%	10.9%	11.7%	9.8%	12.2%
Work colleagues	1.0%	0.0%	0.7%	1.0%	0.9%
Other combinations <sup>(1)</sup>	17.6%	15.6%	11.6%	17.4%	16.1%

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

#### How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	95.3%	91.0%	94.6%	95.2%	93.3%
Average rating (scale 1-10)	8.69	8.48	8.45	8.79	8.66

#### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	67.3%	65.4%	61.0%	62.2%	58.9%
In love (at least 10 previous visits)	8.7%	12.0%	8.8%	6.7%	8.7%

#### Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Italy	73.0%	63.4%	68.3%	81.7%	80.4%
Spanish Mainland	25.8%	31.9%	27.0%	14.1%	14.6%
United Kingdom	0.0%	1.5%	0.7%	1.3%	1.7%
Germany	0.3%	2.2%	2.5%	1.4%	1.1%
Belgium	0.0%	0.0%	0.0%	0.3%	0.9%
Switzerland	0.2%	0.0%	0.8%	0.2%	0.9%
Austria	0.0%	0.0%	0.4%	0.4%	0.0%
France	0.0%	0.5%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.1%	0.0%
Ireland	0.0%	0.0%	0.0%	0.3%	0.0%

#### Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	90.5%	91.2%	83.8%	88.8%	84.8%
Tranquillity/rest/relaxation	39.0%	30.6%	30.3%	29.1%	30.2%
Beaches	25.2%	28.5%	30.9%	29.1%	26.1%
Scenery	20.3%	22.9%	30.3%	26.0%	22.3%
Visiting new places	12.1%	10.4%	17.5%	13.4%	20.9%
Security	6.9%	5.5%	9.3%	13.8%	14.0%
Quality of the environment	14.9%	14.4%	10.5%	14.3%	13.5%
Price	18.2%	17.4%	17.6%	15.1%	13.2%
Active tourism	6.1%	6.4%	3.1%	5.5%	6.9%
Suitable destination for children	3.8%	2.5%	2.8%	3.1%	5.6%
Ease of travel	5.0%	4.0%	4.6%	6.2%	3.2%
Nautical activities	1.3%	2.2%	2.4%	1.9%	2.5%
Culture	1.4%	3.0%	1.0%	1.4%	2.4%
Theme parks	2.0%	0.0%	1.5%	2.1%	2.3%
Nightlife/fun	3.3%	3.8%	1.9%	1.8%	2.0%
Security against natural catastrophes	1.0%	1.0%	1.1%	0.7%	0.8%

\* Multi-choice question

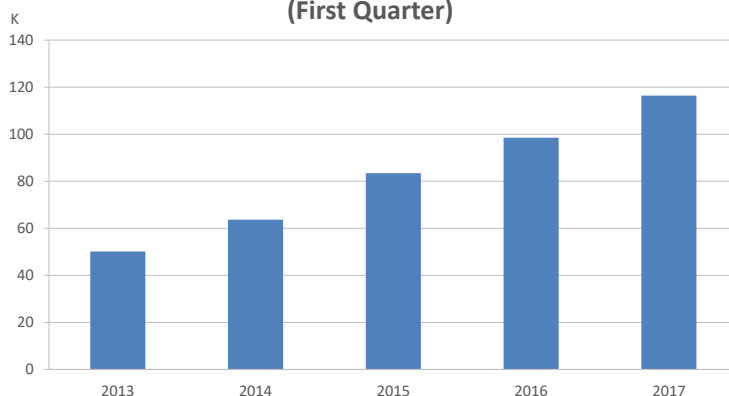
#### What did motivate them to come?



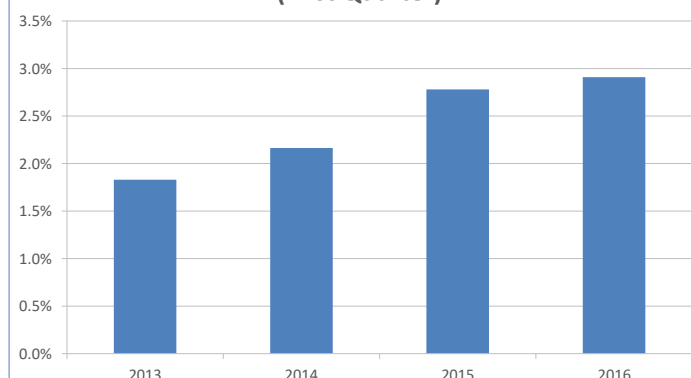
Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	56.7%	52.9%	52.6%	51.6%	50.2%
Recommendation by friends or relatives	38.3%	39.1%	42.5%	40.4%	49.4%
The Canary Islands television channel	0.4%	1.1%	1.2%	0.5%	1.0%
Other television or radio channels	0.4%	0.9%	0.2%	3.1%	2.3%
Information in the press/magazines/books	8.8%	8.5%	11.7%	7.0%	8.9%
Attendance at a tourism fair	0.9%	1.4%	0.0%	1.0%	0.4%
Tour Operator's brochure or catalogue	4.3%	4.8%	3.7%	3.0%	3.8%
Recommendation by Travel Agency	15.9%	10.7%	5.9%	10.9%	10.2%
Information obtained via the Internet	19.6%	23.2%	28.0%	25.5%	28.8%
Senior Tourism programme	0.4%	0.4%	0.0%	0.3%	0.0%
Others	4.3%	2.3%	3.3%	4.0%	2.5%

\* 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.