

# Tourist profile trend (2016)

## Italy: Second Quarter

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Tourist arrivals (> 16 years old)	45,204	43,034	60,575	79,260	99,475
Average daily expenditure (€)	118.79	115.76	127.55	119.54	131.16
. in their place of residence	84.12	77.71	87.68	83.13	90.30
. in the Canary Islands	34.67	38.05	39.88	36.41	40.86
Average length of stay	10.76	11.40	9.72	8.75	9.13
Turnover per tourist (€)	969	993	1,036	944	1,018
Total turnover (> 16 years old) (€m)	43.8	42.7	62.8	74.9	101
Share of total turnover	18.4%	17.5%	20.0%	20.3%	21.0%
Share of total tourist	20.5%	19.1%	22.5%	23.4%	23.3%
<b>Expenditure in the Canary Islands per tourist and trip (€) (*)</b>					
<b>Accommodation (**):</b>	31.80	55.43	54.84	40.18	62.00
- Accommodation	24.74	49.52	51.45	38.98	56.62
- Additional accommodation expenses	7.06	5.91	3.39	1.20	5.38
<b>Transport:</b>	30.56	39.91	33.21	35.72	33.52
- Public transport	4.06	10.91	5.93	6.34	9.82
- Taxi	7.14	7.87	3.87	4.64	3.68
- Car rental	19.37	21.12	23.40	24.75	20.03
<b>Food and drink:</b>	103.12	129.48	142.47	145.21	123.86
- Food purchases at supermarkets	51.89	75.20	87.82	73.91	56.69
- Restaurants	51.24	54.28	54.66	71.31	67.17
<b>Souvenirs:</b>	69.83	70.30	73.44	45.05	53.60
<b>Leisure:</b>	38.90	48.71	44.30	36.62	44.46
- Organized excursions	18.47	20.13	17.65	13.79	20.12
- Leisure, amusement	7.94	4.17	5.80	5.41	3.30
- Trip to other islands	1.40	1.80	3.33	1.36	4.72
- Sporting activities	2.59	3.75	7.04	5.51	5.20
- Cultural activities	1.70	1.50	1.81	2.84	2.55
- Discos and disco-pubs	6.79	17.36	8.67	7.71	8.58
<b>Others:</b>	27.74	23.92	15.03	9.13	10.16
- Wellness	2.42	2.41	1.56	3.15	2.16
- Medical expenses	1.72	0.36	1.72	0.41	1.54
- Other expenses	23.60	21.15	11.75	5.57	6.47

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
The same day they leave	0.0%	0.5%	0.6%	2.1%	0.9%
Between 2 and 7 days	11.7%	13.5%	10.8%	9.3%	10.3%
Between 8 and 15 days	16.5%	18.8%	11.2%	14.1%	11.6%
Between 16 and 30 days	23.7%	21.5%	24.2%	20.4%	14.6%
Between 31 and 90 days	36.9%	34.1%	36.7%	37.1%	45.0%
More than 90 days	11.2%	11.6%	16.5%	17.0%	17.7%

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



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Flight only	19.4%	20.3%	19.0%	20.3%	17.8%
Flight and accommodation (room only)	15.1%	20.2%	20.8%	25.5%	23.7%
Flight and accommodation (B&B)	3.7%	4.2%	4.8%	4.1%	4.1%
Flight and accommodation (half board)	16.6%	11.9%	12.7%	15.8%	12.1%
Flight and accommodation (full board)	15.9%	16.3%	14.9%	6.5%	10.0%
Flight and accommodation (all inclusive)	29.3%	27.1%	27.8%	28.0%	32.2%
<b>% Tourists using low-cost airlines</b>	60.4%	62.6%	58.3%	79.8%	68.9%
<b>Other expenses in their place of residence:</b>					
- Car rental	15.0%	18.1%	18.1%	26.0%	22.3%
- Sporting activities	5.1%	6.2%	5.6%	5.7%	3.1%
- Excursions	1.7%	4.8%	2.8%	8.4%	4.8%
- Trip to other islands	1.5%	1.1%	0.6%	2.4%	2.5%

### How do they book?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Accommodation booking</b>					
<b>Tour Operator</b>	43.0%	33.1%	31.3%	21.4%	29.9%
- Tour Operator's website	32.6%	48.0%	62.7%	57.6%	58.2%
<b>Accommodation</b>	14.0%	17.8%	12.0%	22.7%	17.6%
- Accommodation's website	93.3%	87.5%	77.2%	90.5%	93.5%
<b>Travel agency (High street)</b>	20.4%	21.8%	25.5%	15.6%	22.8%
<b>Online Travel Agency (OTA)</b>	9.8%	16.1%	21.1%	29.0%	21.4%
<b>No need to book accommodation</b>	12.7%	11.3%	10.2%	11.4%	8.2%

	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Flight booking</b>					
<b>Tour Operator</b>	47.0%	31.5%	30.7%	24.8%	29.1%
- Tour Operator's website	43.2%	51.9%	63.4%	62.8%	54.3%
<b>Airline</b>	26.1%	39.7%	32.8%	44.8%	32.7%
- Airline's website	97.6%	95.3%	95.9%	99.0%	99.2%
<b>Travel agency (High street)</b>	20.0%	19.8%	26.9%	16.3%	25.7%
<b>Online Travel Agency (OTA)</b>	6.9%	9.1%	9.7%	14.2%	12.5%

### Where do they stay?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>5* Hotel</b>	4.7%	4.3%	5.3%	4.2%	5.1%
<b>4* Hotel</b>	50.0%	44.2%	38.9%	31.9%	39.2%
<b>1-2-3* Hotel</b>	16.1%	13.2%	15.7%	19.1%	15.7%
<b>Apartment</b>	15.2%	23.8%	26.9%	30.0%	29.3%
<b>Property (privately-owned, friends, family)</b>	10.3%	12.2%	10.1%	12.3%	7.4%
<b>Others</b>	3.6%	2.2%	3.1%	2.5%	3.4%

### Who are they?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
<b>Gender</b>					
Percentage of men	55.6%	54.3%	48.6%	46.7%	51.6%
Percentage of women	44.4%	45.7%	51.4%	53.3%	48.4%
<b>Age</b>					
Average age (tourists > 16 years old)	44.0	41.0	40.8	40.8	44.5
Standard deviation	14.3	13.8	12.2	12.9	14.3
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	7.7%	9.8%	7.2%	9.8%	6.8%
25-30 years old	13.4%	18.5%	16.9%	19.3%	13.6%
31-45 years old	36.5%	37.4%	40.8%	36.8%	35.2%
46-60 years old	27.8%	23.0%	28.4%	25.9%	31.1%
Over 60 years old	14.6%	11.3%	6.7%	8.2%	13.3%
<b>Occupation</b>					
Business owner or self-employed	21.9%	25.0%	29.8%	33.1%	25.6%
Upper/Middle management employee	32.9%	31.2%	29.4%	31.1%	28.9%
Auxiliary level employee	23.3%	20.8%	25.5%	18.7%	24.0%
Students	5.8%	5.8%	6.1%	4.8%	4.8%
Retired	14.1%	11.2%	6.0%	5.8%	11.7%
Unemployed / unpaid dom. work	2.0%	6.0%	3.2%	6.4%	5.0%
<b>Annual household income level</b>					
€12,000 - €24,000	34.5%	41.9%	30.4%	40.0%	37.0%
€24,001 - €36,000	28.4%	21.4%	23.4%	20.1%	24.7%
€36,001 - €48,000	15.8%	12.9%	19.1%	18.2%	13.1%
€48,001 - €60,000	8.4%	8.4%	10.2%	9.3%	10.1%
€60,001 - €72,000	4.2%	5.0%	6.3%	3.1%	7.5%
€72,001 - €84,000	0.4%	3.1%	0.8%	3.5%	1.2%
More than €84,000	8.3%	7.3%	9.7%	5.9%	6.4%

(\*) 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: Second Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	7,250	6,457	7,179	8,256	10,331
- Fuerteventura	10,835	11,439	14,198	18,576	26,216
- Gran Canaria	7,874	6,683	11,837	13,891	18,111
- Tenerife	19,151	18,376	26,462	38,266	44,218
- La Palma	94	79	589	150	347

Share (%)	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
- Lanzarote	16.0%	15.0%	11.9%	10.4%	10.4%
- Fuerteventura	24.0%	26.6%	23.6%	23.5%	26.4%
- Gran Canaria	17.4%	15.5%	19.6%	17.6%	18.3%
- Tenerife	42.4%	42.7%	43.9%	48.4%	44.6%
- La Palma	0.2%	0.2%	1.0%	0.2%	0.3%

#### Who do they come with?



	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Unaccompanied	8.1%	13.3%	13.3%	12.6%	12.7%
Only with partner	52.2%	41.4%	44.4%	41.5%	44.8%
Only with children (under the age of 13)	1.9%	1.4%	0.5%	0.0%	1.4%
Partner + children (under the age of 13)	7.1%	6.7%	7.9%	10.8%	8.1%
Other relatives	4.5%	5.1%	6.8%	5.9%	6.6%
Friends	10.9%	13.5%	12.1%	11.0%	7.9%
Work colleagues	0.9%	1.0%	0.5%	0.5%	0.6%
Other combinations <sup>(1)</sup>	14.3%	17.7%	14.4%	17.7%	18.0%

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

#### How do they rate the destination?



Impression of their stay	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Good or very good (% tourists)	95.1%	92.5%	90.3%	92.7%	92.4%
Average rating (scale 1-10)	8.75	8.53	8.59	8.64	8.57

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

Repeat tourists of the Canary Islands	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Repeat tourists	52.2%	55.7%	46.8%	42.7%	52.8%
In love (at least 10 previous visits)	8.5%	6.0%	8.6%	3.2%	5.7%

#### Where does the flight come from?



Ten main origin countries	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Italy	85.8%	69.3%	68.7%	78.2%	75.8%
Spanish Mainland	13.2%	28.7%	28.0%	17.0%	23.1%
United Kingdom	0.6%	1.3%	1.2%	0.7%	0.6%
Germany	0.4%	0.7%	1.9%	2.0%	0.4%
France	0.0%	0.0%	0.0%	0.7%	0.2%
Belgium	0.0%	0.0%	0.0%	0.2%	0.0%
Ireland	0.0%	0.0%	0.0%	0.1%	0.0%
Austria	0.0%	0.0%	0.0%	0.0%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%



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



Aspects influencing the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Climate/sun	86.3%	80.8%	83.0%	79.2%	83.7%
Beaches	35.3%	38.3%	34.9%	34.2%	40.4%
Tranquillity/rest/relaxation	36.2%	32.3%	33.4%	34.7%	30.7%
Scenery	28.3%	25.2%	22.4%	32.2%	29.0%
Visiting new places	17.0%	19.2%	23.8%	23.5%	20.6%
Price	20.3%	21.1%	15.7%	14.0%	14.4%
Security	9.0%	6.6%	7.7%	5.1%	10.5%
Quality of the environment	11.6%	11.7%	9.0%	13.7%	9.8%
Active tourism	7.0%	5.7%	5.4%	5.3%	4.0%
Ease of travel	4.2%	4.9%	1.2%	2.5%	3.6%
Suitable destination for children	4.3%	3.7%	4.6%	3.8%	3.0%
Theme parks	1.9%	1.4%	1.0%	1.5%	2.2%
Nightlife/fun	2.5%	5.1%	3.6%	1.4%	1.8%
Culture	1.0%	0.0%	1.2%	2.6%	1.5%
Golf	0.8%	1.3%	1.2%	2.1%	1.4%
Nautical activities	0.5%	1.1%	4.4%	1.7%	1.2%

\* Multi-choice question

#### What did motivate them to come?



Aspects motivating the choice	2012Q2	2013Q2	2014Q2	2015Q2	2016Q2
Previous visits to the Canary Islands	44.9%	47.1%	35.4%	32.4%	41.1%
Recommendation by friends or relatives	37.1%	40.3%	45.3%	46.3%	43.3%
The Canary Islands television channel	0.0%	0.5%	0.5%	2.1%	0.7%
Other television or radio channels	0.0%	0.7%	0.9%	1.5%	0.7%
Information in the press/magazines/books	9.3%	6.6%	5.8%	10.6%	9.3%
Attendance at a tourism fair	0.0%	0.3%	0.0%	0.1%	0.6%
Tour Operator's brochure or catalogue	11.5%	13.2%	8.1%	4.0%	9.7%
Recommendation by Travel Agency	17.9%	13.8%	18.4%	12.0%	14.7%
Information obtained via the Internet	30.9%	29.4%	31.8%	35.1%	29.5%
Senior Tourism programme	0.0%	0.6%	0.8%	0.0%	1.1%
Others	5.7%	4.2%	6.1%	6.4%	3.9%

\* 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.