Tourist profile trend (2017)

Italy: Second Quarter

How many are they and how much do they spend?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tourist arrivals (> 16 years old)	43,034	60,575	79,260	99,475	120,259
Average daily expenditure (€)	115.76	127.55	119.54	131.16	131.01
. in their place of residence	77.71	87.68	83.13	90.30	87.39
. in the Canary Islands	38.05	39.88	36.41	40.86	43.62
Average lenght of stay	11.40	9.72	8.75	9.13	9.20
Turnover per tourist (€)	993	1,036	944	1,018	1,032
Total turnover (> 16 years old) (€m)	42.7	62.8	74.9	101	124
Share of total turnover	17.5%	20.0%	20.3%	21.0%	--
Share of total tourist	19.1%	22.5%	23.4%	23.3%	--
Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	55.43	54.84	40.18	62.00	77.70
- Accommodation	49.52	51.45	38.98	56.62	69.69
- Additional accommodation expenses	5.91	3.39	1.20	5.38	8.01
Transport:	39.91	33.21	35.72	33.52	32.56
- Public transport	10.91	5.93	6.34	9.82	6.34
- Taxi	7.87	3.87	4.64	3.68	4.96
- Car rental	21.12	23.40	24.75	20.03	21.26
Food and drink:	129.48	142.47	145.21	123.86	138.81
- Food purchases at supermarkets	75.20	87.82	73.91	56.69	68.41
- Restaurants	54.28	54.66	71.31	67.17	70.39
Souvenirs:	70.30	73.44	45.05	53.60	59.77
Leisure:	48.71	44.30	36.62	44.46	33.33
- Organized excursions	20.13	17.65	13.79	20.12	13.70
- Leisure, amusement	4.17	5.80	5.41	3.30	4.06
- Trip to other islands	1.80	3.33	1.36	4.72	1.99
- Sporting activities	3.75	7.04	5.51	5.20	4.84
- Cultural activities	1.50	1.81	2.84	2.55	1.02
- Discos and disco-pubs	17.36	8.67	7.71	8.58	7.72
Others:	23.92	15.03	9.13	10.16	33.46
- Wellness	2.41	1.56	3.15	2.16	4.32
- Medical expenses	0.36	1.72	0.41	1.54	1.43
- Other expenses	21.15	11.75	5.57	6.47	27.72

How far in advance do they book their trip?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
The same day they leave	0.5%	0.6%	2.1%	0.9%	0.4%
Between 2 and 7 days	13.5%	10.8%	9.3%	10.3%	8.5%
Between 8 and 15 days	18.8%	11.2%	14.1%	11.6%	9.0%
Between 16 and 30 days	21.5%	24.2%	20.4%	14.6%	17.4%
Between 31 and 90 days	34.1%	36.7%	37.1%	45.0%	44.2%
More than 90 days	11.6%	16.5%	17.0%	17.7%	20.5%

What do they book at their place of residence?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Flight only	20.3%	19.0%	20.3%	17.8%	15.8%
Flight and accommodation (room only)	20.2%	20.8%	25.5%	23.7%	29.0%
Flight and accommodation (B&B)	4.2%	4.8%	4.1%	4.1%	4.4%
Flight and accommodation (half board)	11.9%	12.7%	15.8%	12.1%	14.9%
Flight and accommodation (full board)	16.3%	14.9%	6.5%	10.0%	8.0%
Flight and accommodation (all inclusive)	27.1%	27.8%	28.0%	32.2%	28.0%
% Tourists using low-cost airlines	62.6%	58.3%	79.8%	68.9%	77.3%
Other expenses in their place of residence:					
- Car rental	18.1%	18.1%	26.0%	22.3%	21.3%
- Sporting activities	6.2%	5.6%	5.7%	3.1%	2.0%
- Excursions	4.8%	2.8%	8.4%	4.8%	6.9%
- Trip to other islands	1.1%	0.6%	2.4%	2.5%	2.0%

How do they book?

Accommodation booking	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tour Operator	33.1%	31.3%	21.4%	29.9%	24.8%
- Tour Operator´s website	48.0%	62.7%	57.6%	58.2%	76.7%
Accommodation	17.8%	12.0%	22.7%	17.6%	19.9%
- Accommodation´s website	87.5%	77.2%	90.5%	93.5%	91.9%
Travel agency (High street)	21.8%	25.5%	15.6%	22.8%	24.5%
Online Travel Agency (OTA)	16.1%	21.1%	29.0%	21.4%	23.4%
No need to book accommodation	11.3%	10.2%	11.4%	8.2%	7.3%

Flight booking	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Tour Operator	31.5%	30.7%	24.8%	29.1%	29.2%
- Tour Operator´s website	51.9%	63.4%	62.8%	54.3%	69.1%
Airline	39.7%	32.8%	44.8%	32.7%	38.2%
- Airline´s website	95.3%	95.9%	99.0%	99.2%	98.3%
Travel agency (High street)	19.8%	26.9%	16.3%	25.7%	18.8%
Online Travel Agency (OTA)	9.1%	9.7%	14.2%	12.5%	13.8%

Where do they stay?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
5* Hotel	4.3%	5.3%	4.2%	5.1%	7.1%
4* Hotel	44.2%	38.9%	31.9%	39.2%	39.8%
1-2-3* Hotel	13.2%	15.7%	19.1%	15.7%	13.0%
Apartment	23.8%	26.9%	30.0%	29.3%	30.6%
Property (privately-owned,friends,family)	12.2%	10.1%	12.3%	7.4%	7.1%
Others	2.2%	3.1%	2.5%	3.4%	2.4%

Who are they?

Gender	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Percentage of men	54.3%	48.6%	46.7%	51.6%	49.5%
Percentage of women	45.7%	51.4%	53.3%	48.4%	50.5%
Age					
Average age (tourists > 16 years old)	41.0	40.8	40.8	44.5	46.2
Standard deviation	13.8	12.2	12.9	14.3	13.9
Age range (> 16 years old)					
16-24 years old	9.8%	7.2%	9.8%	6.8%	6.5%
25-30 years old	18.5%	16.9%	19.3%	13.6%	9.3%
31-45 years old	37.4%	40.8%	36.8%	35.2%	33.5%
46-60 years old	23.0%	28.4%	25.9%	31.1%	33.8%
Over 60 years old	11.3%	6.7%	8.2%	13.3%	16.9%
Occupation					
Business owner or self-employed	25.0%	29.8%	33.1%	25.6%	24.9%
Upper/Middle management employee	31.2%	29.4%	31.1%	28.9%	39.2%
Auxiliary level employee	20.8%	25.5%	18.7%	24.0%	14.5%
Students	5.8%	6.1%	4.8%	4.8%	3.0%
Retired	11.2%	6.0%	5.8%	11.7%	13.2%
Unemployed / unpaid dom. work	6.0%	3.2%	6.4%	5.0%	5.2%
Annual household income level					
€12,000 - €24,000	41.9%	30.4%	40.0%	37.0%	30.1%
€24,001 - €36,000	21.4%	23.4%	20.1%	24.7%	25.0%
€36,001 - €48,000	12.9%	19.1%	18.2%	13.1%	21.6%
€48,001 - €60,000	8.4%	10.2%	9.3%	10.1%	8.4%
€60,001 - €72,000	5.0%	6.3%	3.1%	7.5%	6.6%
€72,001 - €84,000	3.1%	0.8%	3.5%	1.2%	1.9%
More than €84,000	7.3%	9.7%	5.9%	6.4%	6.5%

(*) 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.

Tourist profile trend (2017)

Italy: Second Quarter

Which island do they choose?

Tourists (> 16 years old)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	6,457	7,179	8,256	10,331	16,763
- Fuerteventura	11,439	14,198	18,576	26,216	28,524
- Gran Canaria	6,683	11,837	13,891	18,111	24,713
- Tenerife	18,376	26,462	38,266	44,218	49,381
- La Palma	79	589	150	347	878

Share (%)	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
- Lanzarote	15.0%	11.9%	10.4%	10.4%	13.9%
- Fuerteventura	26.6%	23.6%	23.5%	26.4%	23.7%
- Gran Canaria	15.5%	19.6%	17.6%	18.3%	20.6%
- Tenerife	42.7%	43.9%	48.4%	44.6%	41.1%
- La Palma	0.2%	1.0%	0.2%	0.3%	0.7%

Who do they come with?

	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Unaccompanied	13.3%	13.3%	12.6%	12.7%	11.7%
Only with partner	41.4%	44.4%	41.5%	44.8%	44.5%
Only with children (under the age of 13)	1.4%	0.5%	0.0%	1.4%	1.1%
Partner + children (under the age of 13)	6.7%	7.9%	10.8%	8.1%	9.5%
Other relatives	5.1%	6.8%	5.9%	6.6%	4.3%
Friends	13.5%	12.1%	11.0%	7.9%	13.4%
Work colleagues	1.0%	0.5%	0.5%	0.6%	0.6%
Other combinations [1]	17.7%	14.4%	17.7%	18.0%	14.9%

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

How do they rate the destination?

Impression of their stay	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Good or very good (% tourists)	92.5%	90.3%	92.7%	92.4%	93.6%
Average rating (scale 1-10)	8.53	8.59	8.64	8.57	8.73

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Repeat tourists	55.7%	46.8%	42.7%	52.8%	50.6%
In love (at least 10 previous visits)	6.0%	8.6%	3.2%	5.7%	4.6%

Where does the flight come from?

Ten main origin markets	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Italy	69.3%	68.7%	78.2%	75.8%	78.1%
Spanish Mainland	28.7%	28.0%	17.0%	23.1%	17.2%
Germany	0.7%	1.9%	2.0%	0.4%	2.7%
Ireland	0.0%	0.0%	0.1%	0.0%	0.7%
United Kingdom	1.3%	1.2%	0.7%	0.6%	0.6%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.5%
Norway	0.0%	0.0%	0.0%	0.0%	0.2%
Belgium	0.0%	0.0%	0.2%	0.0%	0.0%
France	0.0%	0.0%	0.7%	0.2%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%

Why do they choose the Canary Islands?

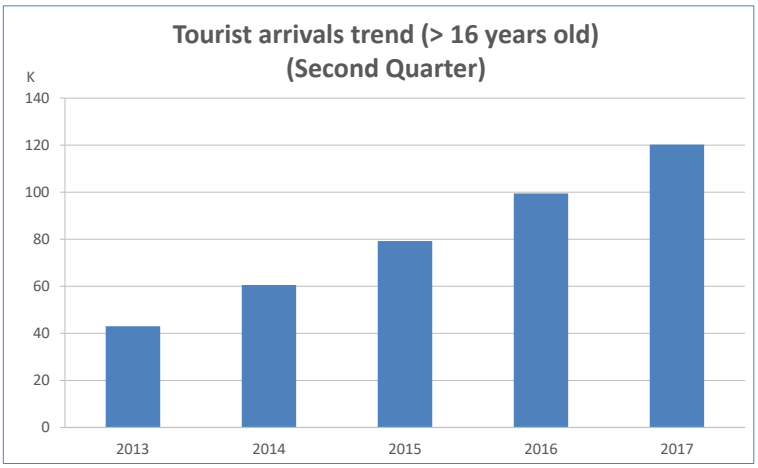
Aspects influencing the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Climate/sun	80.8%	83.0%	79.2%	83.7%	81.9%
Beaches	38.3%	34.9%	34.2%	40.4%	39.1%
Tranquillity/rest/relaxation	32.3%	33.4%	34.7%	30.7%	34.6%
Scenery	25.2%	22.4%	32.2%	29.0%	27.3%
Visiting new places	19.2%	23.8%	23.5%	20.6%	17.9%
Price	21.1%	15.7%	14.0%	14.4%	15.6%
Quality of the environment	11.7%	9.0%	13.7%	9.8%	15.3%
Security	6.6%	7.7%	5.1%	10.5%	8.7%
Active tourism	5.7%	5.4%	5.3%	4.0%	6.1%
Suitable destination for children	3.7%	4.6%	3.8%	3.0%	3.4%
Ease of travel	4.9%	1.2%	2.5%	3.6%	2.8%
Nightlife/fun	5.1%	3.6%	1.4%	1.8%	2.1%
Culture	0.0%	1.2%	2.6%	1.5%	1.2%
Golf	1.3%	1.2%	2.1%	1.4%	1.1%
Health-related tourism	1.1%	1.2%	0.7%	0.5%	1.1%
Security against natural catastrophes	0.5%	0.2%	0.0%	0.3%	0.8%

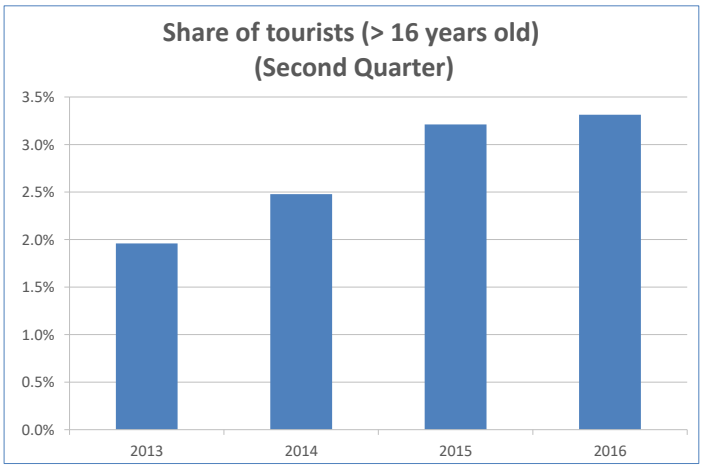
** Multi-choise question*

What did motivate them to come?

Aspects motivating the choice	2013Q2	2014Q2	2015Q2	2016Q2	2017Q2
Previous visits to the Canary Islands	47.1%	35.4%	32.4%	41.1%	41.2%
Recommendation by friends or relatives	40.3%	45.3%	46.3%	43.3%	46.7%
The Canary Islands television channel	0.5%	0.5%	2.1%	0.7%	1.2%
Other television or radio channels	0.7%	0.9%	1.5%	0.7%	1.7%
Information in the press/magazines/books	6.6%	5.8%	10.6%	9.3%	12.0%
Attendance at a tourism fair	0.3%	0.0%	0.1%	0.6%	0.3%
Tour Operator's brochure or catalogue	13.2%	8.1%	4.0%	9.7%	6.1%
Recommendation by Travel Agency	13.8%	18.4%	12.0%	14.7%	16.1%
Information obtained via the Internet	29.4%	31.8%	35.1%	29.5%	29.2%
Senior Tourism programme	0.6%	0.8%	0.0%	1.1%	0.0%
Others	4.2%	6.1%	6.4%	3.9%	2.7%

** Multi-choise 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.