

# Tourist profile trend (2016)

## Italy: Third Quarter



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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Tourist arrivals (> 16 years old)	71,235	74,711	75,782	93,488	122,775
Average daily expenditure (€)	121.55	124.71	132.37	131.13	139.06
. in their place of residence	85.30	89.58	94.46	86.74	91.66
. in the Canary Islands	36.25	35.14	37.91	44.39	47.40
Average length of stay	11.53	10.22	11.03	11.49	10.27
Turnover per tourist (€)	1,211	1,126	1,207	1,280	1,267
Total turnover (> 16 years old) (€m)	86.2	84.1	91.4	120	156
Share of total turnover	36.2%	34.5%	29.2%	32.5%	32.3%
Share of total tourist	32.3%	33.1%	28.1%	27.6%	28.7%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
<b>Accommodation (**):</b>	53.39	53.34	66.75	88.13	90.23
- Accommodation	48.56	46.41	58.65	71.12	79.69
- Additional accommodation expenses	4.83	6.93	8.11	17.02	10.53
<b>Transport:</b>	46.69	41.97	49.32	52.36	47.84
- Public transport	7.23	5.40	13.60	8.39	10.91
- Taxi	8.84	4.63	5.51	4.89	6.90
- Car rental	30.62	31.94	30.21	39.07	30.04
<b>Food and drink:</b>	127.82	120.19	132.12	192.92	180.69
- Food purchases at supermarkets	59.39	48.64	59.96	101.84	69.61
- Restaurants	68.43	71.55	72.17	91.08	111.08
<b>Souvenirs:</b>	66.05	66.51	73.77	61.33	54.80
<b>Leisure:</b>	64.23	45.58	49.46	47.71	56.30
- Organized excursions	23.84	17.36	17.70	14.91	23.40
- Leisure, amusement	9.46	7.27	7.99	4.86	5.27
- Trip to other islands	6.40	3.77	2.29	5.92	3.22
- Sporting activities	7.34	4.11	11.72	6.35	6.88
- Cultural activities	2.15	2.27	2.14	2.15	4.01
- Discos and disco-pubs	15.04	10.80	7.62	13.52	13.53
<b>Others:</b>	25.66	9.62	6.65	13.49	10.70
- Wellness	5.48	2.49	1.72	1.97	2.60
- Medical expenses	2.14	0.98	0.39	0.34	1.09
- Other expenses	18.04	6.15	4.54	11.18	7.01

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
The same day they leave	0.3%	0.1%	1.0%	1.3%	0.7%
Between 2 and 7 days	11.3%	11.8%	8.0%	7.1%	4.9%
Between 8 and 15 days	7.6%	14.2%	13.3%	10.8%	6.6%
Between 16 and 30 days	18.2%	14.2%	17.8%	20.2%	16.6%
Between 31 and 90 days	33.9%	32.3%	34.6%	31.2%	38.5%
More than 90 days	28.8%	27.4%	25.2%	29.4%	32.8%

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



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Flight only	15.3%	15.2%	16.1%	19.6%	14.2%
Flight and accommodation (room only)	24.7%	21.3%	20.5%	29.4%	34.9%
Flight and accommodation (B&B)	2.6%	2.8%	1.7%	6.5%	3.2%
Flight and accommodation (half board)	13.4%	13.2%	14.5%	14.1%	18.6%
Flight and accommodation (full board)	14.3%	11.6%	13.7%	5.9%	6.3%
Flight and accommodation (all inclusive)	29.7%	35.9%	33.6%	24.5%	22.9%
<b>% Tourists using low-cost airlines</b>	57.8%	55.0%	60.5%	75.1%	67.8%
<b>Other expenses in their place of residence:</b>					
- Car rental	15.0%	17.3%	16.3%	22.7%	24.9%
- Sporting activities	4.4%	4.5%	6.9%	6.0%	2.0%
- Excursions	4.3%	4.4%	6.2%	6.0%	8.8%
- Trip to other islands	1.5%	2.8%	2.9%	2.1%	1.8%

### How do they book?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Accommodation booking</b>					
<b>Tour Operator</b>	31.0%	29.5%	26.5%	23.0%	22.3%
- Tour Operator's website	54.5%	47.4%	60.0%	63.8%	77.5%
<b>Accommodation</b>	15.2%	17.1%	15.7%	22.3%	20.8%
- Accommodation's website	85.2%	78.1%	76.1%	73.0%	75.2%
<b>Travel agency (High street)</b>	29.7%	26.6%	27.1%	19.6%	19.7%
<b>Online Travel Agency (OTA)</b>	15.3%	17.9%	21.4%	25.9%	30.8%
<b>No need to book accommodation</b>	8.7%	8.9%	9.2%	9.2%	6.4%

	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Flight booking</b>					
<b>Tour Operator</b>	29.1%	29.0%	30.0%	23.0%	24.1%
- Tour Operator's website	47.4%	47.5%	52.0%	57.9%	66.0%
<b>Airline</b>	33.6%	34.8%	31.4%	39.3%	42.3%
- Airline's website	96.0%	95.8%	98.0%	97.9%	97.6%
<b>Travel agency (High street)</b>	30.4%	26.9%	27.7%	20.9%	19.3%
<b>Online Travel Agency (OTA)</b>	7.0%	9.3%	10.9%	16.8%	14.3%

### Where do they stay?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
5* Hotel	5.0%	4.5%	5.1%	5.4%	4.3%
4* Hotel	41.3%	40.2%	37.2%	25.7%	31.7%
1-2-3* Hotel	10.8%	15.3%	15.2%	16.4%	13.8%
Apartment	34.0%	29.1%	30.1%	39.6%	43.3%
Property (privately-owned, friends, family)	7.7%	8.7%	10.6%	10.1%	5.1%
Others	1.2%	2.2%	1.8%	2.8%	1.9%

### Who are they?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
<b>Gender</b>					
Percentage of men	52.6%	51.4%	52.5%	49.1%	58.3%
Percentage of women	47.4%	48.6%	47.5%	50.9%	41.7%
<b>Age</b>					
Average age (tourists > 16 years old)	38.2	36.2	36.1	38.1	38.3
Standard deviation	12.7	11.9	11.4	12.1	14.2
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	14.7%	16.1%	14.2%	11.6%	17.1%
25-30 years old	20.5%	24.5%	29.8%	21.0%	21.5%
31-45 years old	35.6%	39.1%	31.7%	44.5%	31.2%
46-60 years old	23.6%	16.8%	21.6%	17.7%	21.8%
Over 60 years old	5.6%	3.5%	2.8%	5.1%	8.5%
<b>Occupation</b>					
Business owner or self-employed	24.5%	29.7%	30.7%	30.0%	23.3%
Upper/Middle management employee	34.8%	33.7%	32.2%	39.7%	36.6%
Auxiliary level employee	23.3%	18.7%	18.6%	17.2%	20.5%
Students	9.6%	10.0%	11.0%	8.6%	11.0%
Retired	5.6%	3.6%	2.2%	3.2%	5.1%
Unemployed / unpaid dom. work	2.2%	4.3%	5.3%	1.3%	3.6%
<b>Annual household income level</b>					
€12,000 - €24,000	31.4%	39.3%	37.7%	41.1%	35.9%
€24,001 - €36,000	27.8%	24.6%	24.5%	19.1%	27.1%
€36,001 - €48,000	12.8%	13.6%	14.3%	16.2%	13.8%
€48,001 - €60,000	11.4%	11.1%	7.8%	9.1%	8.9%
€60,001 - €72,000	4.1%	3.0%	5.1%	6.5%	2.9%
€72,001 - €84,000	5.9%	3.1%	2.2%	1.9%	1.6%
More than €84,000	6.8%	5.3%	8.4%	6.1%	9.7%

(\*) 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: Third Quarter

### Which island do they choose?



Tourists (> 16 years old)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	10,379	9,951	8,975	9,113	16,136
- Fuerteventura	20,920	24,964	20,829	26,872	36,107
- Gran Canaria	10,491	10,582	12,439	15,649	19,173
- Tenerife	28,807	28,926	32,453	40,832	50,922
- La Palma	194	287	380	645	253

Share (%)	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
- Lanzarote	14.7%	13.3%	12.0%	9.8%	13.2%
- Fuerteventura	29.6%	33.4%	27.7%	28.9%	29.5%
- Gran Canaria	14.8%	14.2%	16.6%	16.8%	15.6%
- Tenerife	40.7%	38.7%	43.2%	43.9%	41.5%
- La Palma	0.3%	0.4%	0.5%	0.7%	0.2%

### Who do they come with?



	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Unaccompanied	10.8%	7.9%	9.5%	11.4%	8.4%
Only with partner	55.9%	52.7%	49.3%	46.6%	53.8%
Only with children (under the age of 13)	1.0%	0.3%	0.8%	1.5%	0.6%
Partner + children (under the age of 13)	8.8%	6.3%	7.4%	6.4%	6.8%
Other relatives	4.4%	5.3%	4.2%	5.4%	4.3%
Friends	6.2%	12.0%	16.7%	12.8%	12.6%
Work colleagues	0.4%	0.7%	0.9%	0.8%	0.4%
Other combinations <sup>(1)</sup>	12.5%	14.9%	11.1%	15.1%	13.1%

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

### How do they rate the destination?



Impression of their stay	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Good or very good (% tourists)	92.8%	94.1%	92.3%	90.0%	93.5%
Average rating (scale 1-10)	8.62	8.68	8.69	8.64	8.53

### How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Repeat tourists	51.2%	44.4%	42.9%	45.8%	45.7%
In love (at least 10 previous visits)	5.9%	4.4%	4.0%	5.3%	7.2%

### Where does the flight come from?



Ten main origin countries	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Italy	78.3%	69.9%	71.8%	73.2%	71.2%
Spanish Mainland	19.3%	27.3%	25.7%	23.9%	27.3%
Switzerland	0.0%	0.6%	1.0%	0.1%	0.6%
Germany	0.9%	1.7%	0.3%	1.7%	0.4%
Austria	0.2%	0.0%	0.0%	0.0%	0.2%
Belgium	0.4%	0.0%	0.3%	0.0%	0.2%
United Kingdom	0.3%	0.3%	0.7%	0.5%	0.0%
Denmark	0.0%	0.0%	0.3%	0.0%	0.0%
Ireland	0.0%	0.0%	0.0%	0.2%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%



### Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Climate/sun	76.7%	76.7%	80.7%	78.9%	76.6%
Beaches	49.5%	47.3%	45.4%	48.0%	49.1%
Scenery	27.9%	32.6%	30.3%	32.6%	36.2%
Tranquility/rest/relaxation	37.4%	36.3%	36.0%	37.6%	33.5%
Visiting new places	22.8%	22.3%	23.9%	22.2%	23.3%
Price	19.7%	19.9%	17.5%	17.0%	13.6%
Quality of the environment	7.1%	9.8%	9.1%	15.6%	12.1%
Security	4.8%	4.1%	5.1%	6.3%	6.1%
Active tourism	5.4%	3.8%	5.4%	5.1%	5.2%
Nightlife/fun	1.7%	3.2%	4.1%	2.7%	5.0%
Ease of travel	1.2%	1.5%	0.9%	2.0%	3.1%
Theme parks	1.4%	1.3%	2.3%	1.5%	2.3%
Suitable destination for children	4.0%	1.8%	3.5%	2.0%	2.1%
Nautical activities	1.0%	1.6%	2.6%	1.2%	1.6%
Security against natural catastrophes	0.0%	0.3%	0.7%	0.5%	1.2%
Golf	1.4%	0.7%	1.4%	0.9%	1.2%

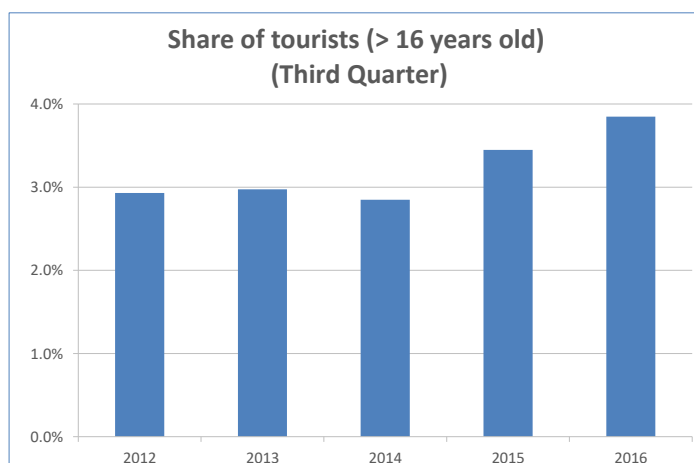
\* Multi-choice question

### What did motivate them to come?



Aspects motivating the choice	2012Q3	2013Q3	2014Q3	2015Q3	2016Q3
Previous visits to the Canary Islands	40.3%	36.3%	35.0%	39.6%	35.5%
Recommendation by friends or relatives	37.5%	42.5%	44.4%	52.6%	46.5%
The Canary Islands television channel	0.0%	0.6%	0.7%	0.3%	0.4%
Other television or radio channels	1.5%	0.7%	1.6%	1.8%	2.6%
Information in the press/magazines/books	9.7%	9.1%	9.0%	8.5%	10.3%
Attendance at a tourism fair	0.8%	0.3%	0.7%	0.0%	0.7%
Tour Operator's brochure or catalogue	11.2%	15.1%	14.2%	7.1%	6.9%
Recommendation by Travel Agency	16.7%	17.6%	14.9%	12.6%	14.6%
Information obtained via the Internet	35.2%	32.2%	32.3%	32.5%	38.4%
Senior Tourism programme	0.7%	0.3%	0.3%	0.6%	0.6%
Others	2.5%	5.4%	3.8%	2.7%	3.0%

\* 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.