

Tourist profile trend (2017)

Italy: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	74,711	75,782	93,488	122,775	132,053
Average daily expenditure (€)	124.71	132.37	131.13	139.06	141.66
. in their place of residence	89.58	94.46	86.74	91.66	100.52
. in the Canary Islands	35.14	37.91	44.39	47.40	41.13
Average length of stay	10.22	11.03	11.49	10.27	9.99
Turnover per tourist (€)	1,126	1,207	1,280	1,267	1,276
Total turnover (> 16 years old) (€m)	84.1	91.4	120	156	168
Share of total turnover	34.5%	29.2%	32.5%	32.3%	--
Share of total tourist	33.1%	28.1%	27.6%	28.7%	--

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	53.34	66.75	88.13	90.23	50.29
- Accommodation	46.41	58.65	71.12	79.69	41.80
- Additional accommodation expenses	6.93	8.11	17.02	10.53	8.49
Transport:	41.97	49.32	52.36	47.84	39.21
- Public transport	5.40	13.60	8.39	10.91	5.60
- Taxi	4.63	5.51	4.89	6.90	5.10
- Car rental	31.94	30.21	39.07	30.04	28.51
Food and drink:	120.19	132.12	192.92	180.69	152.19
- Food purchases at supermarkets	48.64	59.96	101.84	69.61	51.45
- Restaurants	71.55	72.17	91.08	111.08	100.73
Souvenirs:	66.51	73.77	61.33	54.80	61.72
Leisure:	45.58	49.46	47.71	56.30	51.35
- Organized excursions	17.36	17.70	14.91	23.40	18.66
- Leisure, amusement	7.27	7.99	4.86	5.27	7.64
- Trip to other islands	3.77	2.29	5.92	3.22	4.91
- Sporting activities	4.11	11.72	6.35	6.88	8.81
- Cultural activities	2.27	2.14	2.15	4.01	2.96
- Discos and disco-pubs	10.80	7.62	13.52	13.53	8.39
Others:	9.62	6.65	13.49	10.70	21.72
- Wellness	2.49	1.72	1.97	2.60	2.74
- Medical expenses	0.98	0.39	0.34	1.09	0.28
- Other expenses	6.15	4.54	11.18	7.01	18.70

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.1%	1.0%	1.3%	0.7%	0.3%
Between 2 and 7 days	11.8%	8.0%	7.1%	4.9%	6.2%
Between 8 and 15 days	14.2%	13.3%	10.8%	6.6%	6.1%
Between 16 and 30 days	14.2%	17.8%	20.2%	16.6%	13.8%
Between 31 and 90 days	32.3%	34.6%	31.2%	38.5%	38.0%
More than 90 days	27.4%	25.2%	29.4%	32.8%	35.7%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	15.2%	16.1%	19.6%	14.2%	14.9%
Flight and accommodation (room only)	21.3%	20.5%	29.4%	34.9%	30.0%
Flight and accommodation (B&B)	2.8%	1.7%	6.5%	3.2%	3.3%
Flight and accommodation (half board)	13.2%	14.5%	14.1%	18.6%	12.6%
Flight and accommodation (full board)	11.6%	13.7%	5.9%	6.3%	8.7%
Flight and accommodation (all inclusive)	35.9%	33.6%	24.5%	22.9%	30.4%
% Tourists using low-cost airlines	55.0%	60.5%	75.1%	67.8%	68.3%
Other expenses in their place of residence:					
- Car rental	17.3%	16.3%	22.7%	24.9%	22.3%
- Sporting activities	4.5%	6.9%	6.0%	2.0%	4.1%
- Excursions	4.4%	6.2%	6.0%	8.8%	7.9%
- Trip to other islands	2.8%	2.9%	2.1%	1.8%	1.1%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	29.5%	26.5%	23.0%	22.3%	25.5%
- Tour Operator's website	47.4%	60.0%	63.8%	77.5%	65.0%
Accommodation	17.1%	15.7%	22.3%	20.8%	16.9%
- Accommodation's website	78.1%	76.1%	73.0%	75.2%	86.0%
Travel agency (High street)	26.6%	27.1%	19.6%	19.7%	25.6%
Online Travel Agency (OTA)	17.9%	21.4%	25.9%	30.8%	22.3%
No need to book accommodation	8.9%	9.2%	9.2%	6.4%	9.7%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	29.0%	30.0%	23.0%	24.1%	30.5%
- Tour Operator's website	47.5%	52.0%	57.9%	66.0%	69.2%
Airline	34.8%	31.4%	39.3%	42.3%	33.8%
- Airline's website	95.8%	98.0%	97.9%	97.6%	99.4%
Travel agency (High street)	26.9%	27.7%	20.9%	19.3%	23.5%
Online Travel Agency (OTA)	9.3%	10.9%	16.8%	14.3%	12.2%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	4.5%	5.1%	5.4%	4.3%	4.5%
4* Hotel	40.2%	37.2%	25.7%	31.7%	34.1%
1-2-3* Hotel	15.3%	15.2%	16.4%	13.8%	17.2%
Apartment	29.1%	30.1%	39.6%	43.3%	34.0%
Property (privately-owned, friends, family)	8.7%	10.6%	10.1%	5.1%	7.1%
Others	2.2%	1.8%	2.8%	1.9%	3.2%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	51.4%	52.5%	49.1%	58.3%	55.5%
Percentage of women	48.6%	47.5%	50.9%	41.7%	44.5%

Age					
Average age (tourists > 16 years old)	36.2	36.1	38.1	38.3	42.1
Standard deviation	11.9	11.4	12.1	14.2	15.5

Age range (> 16 years old)					
16-24 years old	16.1%	14.2%	11.6%	17.1%	13.6%
25-30 years old	24.5%	29.8%	21.0%	21.5%	16.5%
31-45 years old	39.1%	31.7%	44.5%	31.2%	29.4%
46-60 years old	16.8%	21.6%	17.7%	21.8%	26.6%
Over 60 years old	3.5%	2.8%	5.1%	8.5%	13.9%

Occupation					
Business owner or self-employed	29.7%	30.7%	30.0%	23.3%	26.2%
Upper/Middle management employee	33.7%	32.2%	39.7%	36.6%	35.6%
Auxiliary level employee	18.7%	18.6%	17.2%	20.5%	20.1%
Students	10.0%	11.0%	8.6%	11.0%	6.8%
Retired	3.6%	2.2%	3.2%	5.1%	8.1%
Unemployed / unpaid dom. work	4.3%	5.3%	1.3%	3.6%	3.3%

Annual household income level					
€12,000 - €24,000	39.3%	37.7%	41.1%	35.9%	30.4%
€24,001 - €36,000	24.6%	24.5%	19.1%	27.1%	25.0%
€36,001 - €48,000	13.6%	14.3%	16.2%	13.8%	16.3%
€48,001 - €60,000	11.1%	7.8%	9.1%	8.9%	7.8%
€60,001 - €72,000	3.0%	5.1%	6.5%	2.9%	6.1%
€72,001 - €84,000	3.1%	2.2%	1.9%	1.6%	4.2%
More than €84,000	5.3%	8.4%	6.1%	9.7%	10.1%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	9,951	8,975	9,113	16,136	20,371
- Fuerteventura	24,964	20,829	26,872	36,107	33,432
- Gran Canaria	10,582	12,439	15,649	19,173	23,676
- Tenerife	28,926	32,453	40,832	50,922	54,097
- La Palma	287	380	645	253	157

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	13.3%	12.0%	9.8%	13.2%	15.5%
- Fuerteventura	33.4%	27.7%	28.9%	29.5%	25.4%
- Gran Canaria	14.2%	16.6%	16.8%	15.6%	18.0%
- Tenerife	38.7%	43.2%	43.9%	41.5%	41.1%
- La Palma	0.4%	0.5%	0.7%	0.2%	0.1%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	7.9%	9.5%	11.4%	8.4%	11.0%
Only with partner	52.7%	49.3%	46.6%	53.8%	48.9%
Only with children (under the age of 13)	0.3%	0.8%	1.5%	0.6%	1.1%
Partner + children (under the age of 13)	6.3%	7.4%	6.4%	6.8%	8.5%
Other relatives	5.3%	4.2%	5.4%	4.3%	5.1%
Friends	12.0%	16.7%	12.8%	12.6%	9.9%
Work colleagues	0.7%	0.9%	0.8%	0.4%	0.3%
Other combinations ⁽¹⁾	14.9%	11.1%	15.1%	13.1%	15.1%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	94.1%	92.3%	90.0%	93.5%	91.6%
Average rating (scale 1-10)	8.68	8.69	8.64	8.53	8.68

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	44.4%	42.9%	45.8%	45.7%	48.2%
In love (at least 10 previous visits)	4.4%	4.0%	5.3%	7.2%	4.3%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Italy	69.9%	71.8%	73.2%	71.2%	69.4%
Spanish Mainland	27.3%	25.7%	23.9%	27.3%	26.5%
Switzerland	0.6%	1.0%	0.1%	0.6%	1.8%
Germany	1.7%	0.3%	1.7%	0.4%	1.2%
United Kingdom	0.3%	0.7%	0.5%	0.0%	0.4%
Belgium	0.0%	0.3%	0.0%	0.2%	0.3%
Austria	0.0%	0.0%	0.0%	0.2%	0.2%
Denmark	0.0%	0.3%	0.0%	0.0%	0.0%
Ireland	0.0%	0.0%	0.2%	0.0%	0.0%
France	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	76.7%	80.7%	78.9%	76.6%	78.4%
Beaches	47.3%	45.4%	48.0%	49.1%	51.0%
Scenery	32.6%	30.3%	32.6%	36.2%	36.6%
Tranquillity/rest/relaxation	36.3%	36.0%	37.6%	33.5%	32.8%
Visiting new places	22.3%	23.9%	22.2%	23.3%	21.6%
Price	19.9%	17.5%	17.0%	13.6%	14.0%
Quality of the environment	9.8%	9.1%	15.6%	12.1%	9.8%
Active tourism	3.8%	5.4%	5.1%	5.2%	6.3%
Security	4.1%	5.1%	6.3%	6.1%	5.4%
Theme parks	1.3%	2.3%	1.5%	2.3%	3.7%
Nightlife/fun	3.2%	4.1%	2.7%	5.0%	3.7%
Culture	2.5%	1.7%	0.9%	0.8%	2.5%
Nautical activities	1.6%	2.6%	1.2%	1.6%	1.9%
Ease of travel	1.5%	0.9%	2.0%	3.1%	1.7%
Security against natural catastrophes	0.3%	0.7%	0.5%	1.2%	1.6%
Suitable destination for children	1.8%	3.5%	2.0%	2.1%	0.8%

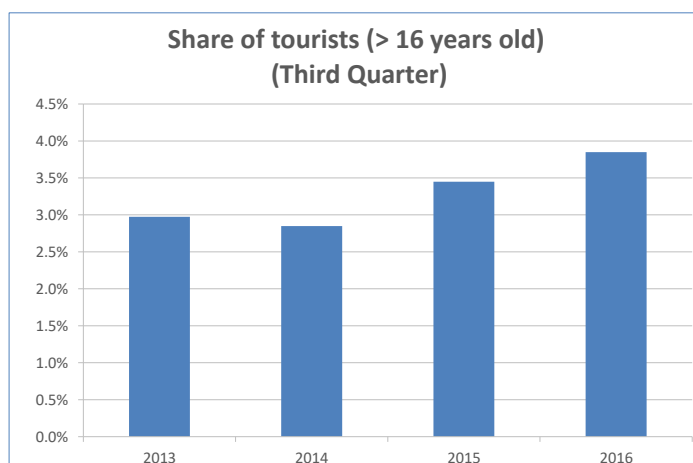
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	36.3%	35.0%	39.6%	35.5%	39.5%
Recommendation by friends or relatives	42.5%	44.4%	52.6%	46.5%	46.8%
The Canary Islands television channel	0.6%	0.7%	0.3%	0.4%	0.2%
Other television or radio channels	0.7%	1.6%	1.8%	2.6%	1.8%
Information in the press/magazines/books	9.1%	9.0%	8.5%	10.3%	9.3%
Attendance at a tourism fair	0.3%	0.7%	0.0%	0.7%	0.6%
Tour Operator's brochure or catalogue	15.1%	14.2%	7.1%	6.9%	7.7%
Recommendation by Travel Agency	17.6%	14.9%	12.6%	14.6%	16.4%
Information obtained via the Internet	32.2%	32.3%	32.5%	38.4%	32.6%
Senior Tourism programme	0.3%	0.3%	0.6%	0.6%	0.0%
Others	5.4%	3.8%	2.7%	3.0%	2.8%

* 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.