

Tourist profile trend (2017)

ITALY: Fourth Quarter

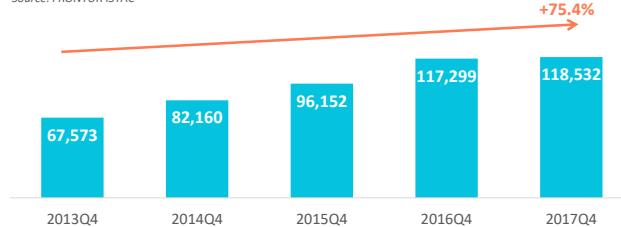


How many are they and how much do they spend?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	67,573	82,160	96,152	117,299	118,532
Tourist arrivals (<u>> 16 years old</u>)	57,901	69,604	82,952	106,992	109,484
Average daily expenditure (€)	131.21	110.10	128.07	134.75	138.84
. in their place of residence	90.73	68.79	89.53	88.08	96.76
. in the Canary Islands	40.48	41.30	38.54	46.67	42.08
Average length of stay	9.40	13.41	9.71	9.15	8.78
Turnover per tourist (€)	1,075	1,198	1,030	1,070	1,078
Total turnover (€m)	73	98	99	125	128
Share of annual tourist	25.4%	25.7%	24.0%	24.9%	22.2%
Share of annual turnover	25.3%	26.5%	22.8%	23.7%	21.3%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	18.2%	23.8%	19.3%	22.5%	15.6%
- Additional accommodation expenses	8.0%	10.8%	7.6%	7.6%	8.0%
Transport:					
- Public transport	14.8%	13.4%	16.2%	16.6%	12.4%
- Taxi	15.2%	8.1%	13.0%	13.7%	13.1%
- Car rental	25.1%	30.2%	28.5%	27.5%	27.4%
Food and drink:					
- Food purchases at supermarkets	48.3%	45.9%	46.2%	50.1%	47.2%
- Restaurants	48.8%	51.2%	53.1%	52.2%	52.7%
Souvenirs:					
- Souvenirs	67.4%	61.5%	56.0%	62.6%	56.2%
Leisure:					
- Organized excursions	15.1%	16.4%	16.3%	19.9%	19.7%
- Leisure, amusement	10.2%	10.5%	9.2%	9.3%	11.4%
- Trip to other islands	1.4%	5.2%	2.6%	3.1%	5.1%
- Sporting activities	6.3%	6.6%	6.1%	7.2%	6.0%
- Cultural activities	3.0%	5.6%	5.1%	8.4%	5.4%
- Discos and disco-pubs	12.9%	9.7%	10.4%	10.6%	7.3%
Others:					
- Wellness	3.4%	3.9%	4.1%	2.4%	3.9%
- Medical expenses	3.2%	3.2%	4.1%	3.4%	3.3%
- Other expenses	7.0%	7.3%	7.3%	14.6%	8.9%

TOURIST ARRIVALS

Source: FRONTUR ISTAC



What do they book at their place of residence?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	19.4%	27.3%	19.0%	14.4%	15.6%
Flight and accommodation (room only)	19.1%	22.8%	24.4%	31.9%	28.0%
Flight and accommodation (B&B)	5.9%	4.8%	8.5%	5.9%	4.5%
Flight and accommodation (half board)	11.8%	13.9%	9.8%	12.8%	13.4%
Flight and accommodation (full board)	15.5%	9.3%	12.6%	11.2%	15.2%
Flight and accommodation (all inclusive)	28.3%	21.9%	25.8%	23.8%	23.2%
<u>% Tourists using low-cost airlines</u>	60.6%	83.8%	76.3%	73.4%	72.1%
<u>Other expenses in their place of residence:</u>					
- Car rental	14.3%	22.6%	23.5%	19.8%	18.7%
- Sporting activities	2.2%	2.0%	5.4%	2.3%	2.8%
- Excursions	6.6%	4.7%	4.0%	6.2%	3.7%
- Trip to other islands	1.5%	2.8%	2.0%	1.8%	2.5%

How do they book?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	29.1%	17.7%	25.5%	22.7%	28.5%
- Tour Operator's website	52.5%	54.5%	80.0%	72.3%	68.9%
Accommodation	14.1%	25.0%	16.1%	17.9%	17.9%
- Accommodation's website	85.0%	75.1%	90.0%	91.9%	80.1%
Travel agency (High street)	28.1%	21.7%	27.7%	26.6%	20.4%
Online Travel Agency (OTA)	16.1%	26.2%	18.7%	26.8%	24.6%
No need to book accommodation	12.7%	9.4%	12.0%	6.0%	8.6%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	29.4%	20.9%	25.6%	23.8%	30.6%
- Tour Operator's website	47.7%	57.0%	67.6%	66.4%	62.5%
Airline	32.1%	46.2%	37.4%	42.0%	39.9%
- Airline's website	97.6%	98.8%	96.4%	98.0%	97.9%
Travel agency (High street)	30.3%	21.6%	25.3%	23.6%	19.0%
Online Travel Agency (OTA)	8.2%	11.3%	11.8%	10.6%	10.5%

How far in advance do they book their trip?

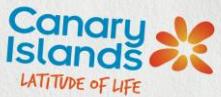
	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.4%	0.9%	0.0%	1.0%	0.0%
Between 2 and 7 days	10.6%	9.1%	13.7%	5.5%	3.8%
Between 8 and 15 days	14.3%	17.8%	10.9%	10.5%	9.2%
Between 16 and 30 days	23.6%	23.1%	24.6%	22.9%	20.3%
Between 31 and 90 days	38.7%	38.2%	33.1%	40.0%	42.5%
More than 90 days	12.4%	10.9%	17.6%	20.1%	24.1%

Who are they?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	50.9%	51.9%	52.1%	52.7%	54.5%
Women	49.1%	48.1%	47.9%	47.3%	45.5%
<u>Age</u>					
Average age (tourists > 16 years old)	38.7	39.1	41.8	41.4	44.0
Standard deviation	12.5	12.7	14.5	14.1	15.8
<u>Age range (> 16 years old)</u>					
16-24 years old	12.6%	10.4%	10.7%	12.7%	13.5%
25-30 years old	18.4%	20.8%	18.8%	14.8%	12.7%
31-45 years old	43.1%	36.5%	33.1%	35.0%	28.5%
46-60 years old	20.6%	24.8%	25.6%	26.2%	27.6%
Over 60 years old	5.4%	7.4%	11.7%	11.3%	17.7%
<u>Occupation</u>					
Business owner or self-employed	33.1%	37.5%	29.7%	28.8%	28.4%
Upper/Middle management employee	31.5%	26.8%	31.7%	33.1%	25.1%
Auxiliary level employee	13.8%	16.8%	15.3%	15.8%	18.6%
Students	6.2%	6.6%	9.9%	5.6%	11.0%
Retired	7.2%	6.7%	10.6%	9.3%	13.3%
Unemployed / unpaid dom. work	8.1%	5.5%	2.8%	7.5%	3.6%
<u>Annual household income level</u>					
€12,000 - €24,000	49.5%	45.1%	30.0%	37.5%	35.4%
€24,001 - €36,000	18.2%	23.3%	34.9%	23.6%	26.6%
€36,001 - €48,000	16.6%	14.8%	18.0%	15.2%	13.1%
€48,001 - €60,000	8.6%	7.4%	7.7%	10.6%	15.2%
€60,001 - €72,000	2.8%	3.6%	1.6%	2.9%	3.7%
€72,001 - €84,000	0.8%	1.3%	2.6%	2.6%	1.5%
More than €84,000	3.4%	4.3%	5.1%	7.5%	4.5%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	5,146	6,456	7,993	13,855	16,319
- Fuerteventura	14,676	13,353	22,079	23,977	18,266
- Gran Canaria	13,330	16,167	19,935	24,580	23,449
- Tenerife	24,345	33,246	32,647	44,480	46,508
- La Palma	404	382	298	100	4,591

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	8.9%	9.3%	9.6%	12.9%	15.0%
- Fuerteventura	25.3%	19.2%	26.6%	22.4%	16.7%
- Gran Canaria	23.0%	23.2%	24.0%	23.0%	21.5%
- Tenerife	42.0%	47.8%	39.4%	41.6%	42.6%
- La Palma	0.7%	0.5%	0.4%	0.1%	4.2%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	2.7%	0.6%	1.7%	2.9%	3.6%
4* Hotel	46.2%	38.0%	38.0%	38.2%	40.3%
1-2-3* Hotel	14.1%	9.8%	18.2%	11.6%	11.9%
Apartment	21.3%	35.9%	26.5%	37.9%	33.3%
Property (privately-owned, friends, family)	10.9%	11.0%	12.6%	5.3%	6.7%
Others	4.8%	4.6%	3.0%	4.0%	4.2%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	88.6%	86.1%	93.4%	88.0%	87.9%
Beaches	33.1%	30.0%	38.1%	38.6%	36.2%
Tranquillity/rest/relaxation	38.3%	36.9%	32.0%	36.9%	31.2%
Scenery	22.6%	25.9%	28.7%	23.3%	27.1%
Price	19.4%	22.0%	16.2%	16.1%	15.6%
Visiting new places	14.1%	18.5%	16.5%	21.6%	14.2%
Quality of the environment	17.0%	9.2%	10.8%	12.4%	10.5%
Security	9.2%	3.7%	10.9%	8.8%	9.8%
Active tourism	4.4%	8.7%	5.5%	5.0%	8.5%
Ease of travel	3.3%	2.5%	2.4%	3.4%	4.3%
Nightlife/fun	4.8%	4.2%	4.1%	1.9%	3.4%
Nautical activities	1.8%	2.9%	2.2%	2.2%	2.3%
Suitable destination for children	3.5%	1.3%	2.1%	2.2%	2.2%
Theme parks	2.8%	1.7%	0.9%	3.2%	2.1%
Culture	1.0%	0.7%	0.9%	1.5%	1.2%
Golf	0.0%	1.9%	0.3%	0.0%	0.8%

* Multi-choice question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	12.7%	17.4%	15.1%	13.0%	10.2%
Only with partner	51.3%	49.9%	45.0%	46.3%	46.3%
Only with children (under the age of 13)	0.4%	0.0%	0.7%	1.4%	0.4%
Partner + children (under the age of 13)	8.5%	5.6%	6.2%	8.4%	9.3%
Other relatives	5.0%	4.5%	8.1%	9.7%	8.3%
Friends	7.7%	9.3%	12.1%	8.7%	7.7%
Work colleagues	0.3%	1.7%	0.0%	0.4%	0.3%
Other combinations ⁽¹⁾	14.0%	11.7%	12.8%	12.2%	17.6%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	92.8%	96.2%	94.7%	92.2%	94.3%
Average rating (scale 1-10)	8.64	9.02	8.73	8.66	8.77

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	48.6%	58.2%	54.8%	54.6%	57.0%
At least 10 previous visits	5.7%	4.5%	6.6%	4.4%	6.3%

Where does the flight come from?

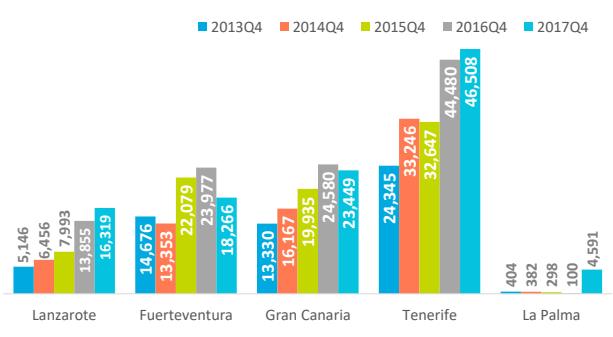
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Italy	75.5%	83.5%	77.7%	79.7%	74.9%
Spanish Mainland	22.7%	15.5%	20.7%	17.5%	21.2%
Germany	0.9%	0.5%	0.9%	1.9%	1.5%
Switzerland	0.0%	0.0%	0.0%	0.0%	0.9%
Sweden	0.0%	0.0%	0.0%	0.0%	0.4%
Ireland	0.0%	0.0%	0.0%	0.0%	0.3%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.3%
Belgium	0.0%	0.0%	0.0%	0.2%	0.3%
France	0.0%	0.0%	0.0%	0.0%	0.1%
Others	0.9%	0.5%	0.6%	0.7%	0.1%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	42.6%	43.9%	48.6%	45.6%	44.4%
Recommendation by friends/relatives	46.2%	49.4%	46.5%	42.8%	38.3%
The Canary Islands television channel	0.7%	0.6%	1.1%	0.3%	1.1%
Other television or radio channels	0.0%	2.2%	0.8%	2.8%	0.7%
Information in press/magazines/books	7.2%	9.8%	7.4%	8.5%	6.3%
Attendance at a tourism fair	0.8%	0.6%	0.7%	0.3%	0.5%
Tour Operator's brochure or catalogue	9.0%	6.2%	4.4%	6.5%	6.3%
Recommendation by Travel Agency	20.3%	13.0%	15.3%	14.4%	18.2%
Information obtained via the Internet	34.2%	31.0%	28.8%	33.1%	33.5%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.8%
Others	7.2%	4.5%	4.0%	4.4%	4.0%

* Multi-choice question

Tourist arrivals by islands



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.