

## Tourist profile trend (2015)

### Canary Islands: Italian



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



	2011	2012	2013	2014	2015
Tourist arrivals (> 16 years old)	282,720	251,126	337,278	314,171	376,775
Average daily expenditure (€)	124.43	120.23	112.57	127.16	127.18
- in their place of residence	81.97	81.67	73.04	85.35	86.38
- in the Canary Islands	42.46	38.56	39.53	41.81	40.80
Average length of stay	11.40	10.79	11.22	10.73	10.04
Turnover per tourist (€)	1,118	1,084	1,037	1,143	1,088
Total turnover (> 16 years old) (€m)	316	272	350	359	410
Year on year variation of turnover	--	-13.8%	28.5%	2.6%	14.2%
Year on year variation of tourist	--	-11.2%	34.3%	-6.9%	19.9%

#### Expenditure in the Canary Islands per tourist and trip (€)

<b>Accommodation (*)</b> :	88.56	51.23	64.80	73.60	67.05
- Accommodation	69.84	44.42	57.53	68.17	59.17
- Additional accommodation expenses	18.73	6.81	7.27	5.43	7.88
<b>Transport:</b>	51.87	39.27	42.87	42.44	40.34
- Public transport	8.99	5.81	12.22	9.65	7.08
- Taxi	9.79	7.15	5.21	3.90	5.55
- Car rental	33.09	26.31	25.45	28.90	27.71
<b>Food and drink:</b>	150.00	120.70	163.08	141.81	157.69
- Food purchases at supermarkets	76.23	54.47	77.46	73.54	75.35
- Restaurants	73.77	66.23	85.62	68.27	82.34
<b>Souvenirs:</b>	67.48	73.38	73.66	72.10	55.63
<b>Leisure:</b>	58.46	44.24	46.38	55.17	39.36
- Organized excursions	22.92	17.88	13.22	24.09	14.57
- Leisure, amusement	8.73	7.13	8.37	7.09	5.13
- Trip to other islands	4.30	3.72	4.83	2.40	2.25
- Sporting activities	5.52	6.30	6.05	9.35	5.46
- Cultural activities	2.98	1.72	1.70	1.81	2.71
- Discos and disco-pubs	14.00	7.48	12.21	10.43	9.23
<b>Others:</b>	66.77	28.06	14.91	14.04	11.07
- Wellness	4.90	5.19	2.70	3.05	1.76
- Medical expenses	2.12	1.76	0.84	1.28	0.98
- Other expenses	59.74	21.11	11.37	9.71	8.33

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



	2011	2012	2013	2014	2015
The same day they leave	1.0%	0.4%	1.2%	1.3%	1.2%
Between 2 and 7 days	15.3%	13.9%	13.5%	9.0%	9.4%
Between 8 and 15 days	13.0%	11.9%	14.0%	13.5%	10.7%
Between 16 and 30 days	20.2%	22.0%	20.6%	24.1%	20.1%
Between 31 and 90 days	35.3%	35.4%	30.7%	34.1%	36.9%
More than 90 days	15.2%	16.4%	20.0%	18.0%	21.6%

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



	2011	2012	2013	2014	2015
Flight only	22.6%	19.3%	28.5%	19.9%	20.2%
Flight and accommodation (room only)	16.5%	20.9%	24.8%	21.9%	26.5%
Flight and accommodation (B&B)	4.1%	4.0%	3.2%	5.0%	6.5%
Flight and accommodation (half board)	13.8%	12.9%	9.2%	13.7%	13.2%
Flight and accommodation (full board)	14.0%	17.1%	11.4%	12.0%	9.5%
Flight and accommodation (all inclusive)	28.8%	25.8%	23.0%	27.5%	24.0%
<b>% Tourists using low-cost airlines</b>	55.6%	65.0%	63.4%	67.6%	74.7%
<b>Other expenses in their place of residence:</b>					
- Car rental	10.9%	16.8%	17.4%	19.8%	23.7%
- Sporting activities	4.1%	3.9%	4.7%	5.3%	4.6%
- Excursions	3.1%	2.1%	4.5%	3.9%	4.9%
- Combined trip to other islands	1.7%	1.5%	2.3%	2.1%	1.7%

#### How do they book?



	2011	2012	2013	2014	2015
<b>Accommodation booking</b>					
<b>Tour Operator</b>	36.8%	31.4%	24.6%	24.2%	21.4%
- Tour Operator's website	40.0%	54.3%	60.3%	59.7%	67.8%
<b>Accommodation</b>	14.7%	17.1%	18.0%	19.0%	23.3%
- Accommodation's website	69.2%	85.7%	73.6%	78.0%	81.5%
<b>Travel agency (High street)</b>	21.3%	25.0%	20.8%	23.9%	20.8%
<b>Online Travel Agency (OTA)</b>	13.6%	15.1%	19.3%	23.1%	23.8%
<b>No need to book accommodation</b>	13.6%	11.5%	17.3%	9.8%	10.6%

#### Flight booking

	2011	2012	2013	2014	2015
<b>Tour Operator</b>	41.4%	34.0%	24.2%	27.3%	23.5%
- Tour Operator's website	47.2%	53.0%	62.5%	61.2%	63.9%
<b>Airline</b>	27.0%	31.0%	42.0%	38.1%	42.3%
- Airline's website	97.5%	97.9%	97.7%	96.9%	97.9%
<b>Travel agency (High street)</b>	22.8%	25.1%	23.3%	24.8%	21.1%
<b>Online Travel Agency (OTA)</b>	8.8%	9.8%	10.5%	9.7%	13.1%

#### Where do they stay?



	2011	2012	2013	2014	2015
5* Hotel	6.0%	3.1%	3.3%	3.7%	4.6%
4* Hotel	42.3%	43.1%	29.6%	37.7%	34.0%
1-2-3* Hotel	11.9%	14.1%	11.0%	15.2%	15.8%
Apartment	27.8%	27.6%	33.7%	30.4%	30.7%
Property (privately-owned, friends, family)	9.1%	9.6%	17.5%	10.3%	11.8%
Others	3.0%	2.5%	4.8%	2.7%	3.1%

#### How are they?



	2011	2012	2013	2014	2015
<b>Gender</b>					
Percentage of men	57.6%	56.2%	54.1%	55.5%	52.0%
Percentage of women	42.4%	43.8%	45.9%	44.5%	48.0%

#### Age

Average age (tourists > 16 years old)	40.2	41.0	39.4	39.0	41.2
Standard deviation	13.4	14.1	14.0	12.8	13.5

#### Age range

16-24 years old	9.3%	9.3%	12.3%	9.4%	7.2%
25-30 years old	18.9%	17.7%	18.2%	22.4%	20.2%
31-45 years old	40.7%	41.2%	43.1%	40.1%	40.5%
46-60 years old	20.2%	19.9%	15.4%	20.0%	20.9%
Over 60 years old	10.8%	11.9%	10.9%	8.1%	11.2%

#### Occupation

Business owner or self-employed	30.5%	27.6%	27.1%	32.9%	32.5%
Upper/Middle management employee	31.0%	32.9%	28.3%	29.3%	33.1%
Auxiliary level employee	16.4%	18.8%	18.3%	18.6%	16.6%
Students	7.1%	7.1%	9.8%	7.4%	6.5%
Retired	9.7%	10.7%	10.9%	6.9%	8.5%
Unemployed / unpaid dom. work	5.3%	2.9%	5.5%	4.8%	2.7%

#### Annual household income level

€12,000 - €24,000	32.6%	35.1%	39.3%	36.9%	35.2%
€24,001 - €36,000	24.4%	27.4%	24.1%	24.2%	25.1%
€36,001 - €48,000	17.8%	13.4%	15.2%	16.3%	16.7%
€48,001 - €60,000	11.7%	10.0%	9.8%	8.9%	9.4%
€60,001 - €72,000	4.3%	4.5%	3.6%	4.2%	4.4%
€72,001 - €84,000	2.4%	2.6%	3.1%	1.8%	3.0%
More than €84,000	6.8%	7.1%	4.9%	7.7%	6.3%

(\*) Bear in mind that 80% of Italian tourists in 2015 paid the accommodation before travelling.

## Tourist profile trend (2015)

### Canary Islands: Italian



#### Which island do they choose?

Tourists (> 16 years old)	2011	2012	2013	2014	2015
- Lanzarote	26,483	32,209	45,788	37,594	38,041
- Fuerteventura	74,873	62,041	80,907	81,447	94,695
- Gran Canaria	54,933	43,156	68,329	70,119	78,147
- Tenerife	123,959	111,178	139,644	122,478	164,017
- La Palma	1,784	837	2,023	1,610	1,361

Share (%)	2011	2012	2013	2014	2015
- Lanzarote	9.4%	12.9%	13.6%	12.0%	10.1%
- Fuerteventura	26.5%	24.9%	24.0%	26.0%	25.2%
- Gran Canaria	19.5%	17.3%	20.3%	22.4%	20.8%
- Tenerife	44.0%	44.6%	41.5%	39.1%	43.6%
- La Palma	0.6%	0.3%	0.6%	0.5%	0.4%

#### Who do they come with?



	2011	2012	2013	2014	2015
Unaccompanied	15.0%	11.3%	13.0%	12.8%	12.8%
Only with partner	42.1%	52.2%	42.6%	46.5%	45.2%
Only with children (under the age of 13)	0.8%	1.1%	0.9%	0.7%	0.9%
Partner + children (under the age of 13)	10.6%	7.7%	7.8%	8.0%	8.0%
Other relatives	5.0%	5.8%	7.9%	5.9%	6.5%
Friends	12.0%	9.3%	12.5%	12.2%	11.9%
Work colleagues	0.6%	0.5%	0.9%	0.8%	0.6%

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



Aspects influencing the choice	2011	2012	2013	2014	2015
Climate/sun	81.9%	81.6%	82.7%	84.8%	85.0%
Beaches	33.3%	37.7%	34.3%	36.6%	39.1%
Tranquility/rest/relaxation	35.5%	35.1%	36.1%	34.4%	34.9%
Scenery	25.8%	26.1%	24.8%	26.8%	31.1%
Visiting new places	22.1%	18.8%	16.3%	19.4%	20.0%
Price	18.4%	20.8%	20.8%	19.4%	16.1%
Quality of the environment	8.3%	8.6%	13.2%	9.3%	11.6%
Security	11.5%	7.1%	5.2%	5.2%	7.8%
Active tourism	4.4%	5.4%	5.3%	6.6%	4.9%
Nightlife/fun	3.9%	1.9%	4.6%	3.3%	2.8%
Ease of travel	3.7%	3.2%	3.3%	2.4%	2.7%
Suitable destination for children	3.5%	4.2%	2.9%	3.4%	2.7%
Nautical activities	1.0%	1.6%	1.9%	3.1%	1.8%
Culture	1.1%	1.0%	1.2%	1.8%	1.5%
Theme parks	2.2%	1.3%	2.0%	1.2%	1.3%
Golf	1.2%	1.3%	0.7%	1.6%	1.3%

\* Multi-choice question

#### How do they value the destination?



Impression of their stay	2011	2012	2013	2014	2015
Good or very good (% tourists)	92.8%	94.2%	93.7%	92.4%	93.5%
Average rating (scale 1-10)	8.54	8.65	8.63	8.71	8.65

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

Percentage of repeat tourists	2011	2012	2013	2014	2015
Repeat tourists	52.3%	53.9%	57.5%	51.3%	50.0%
In love (more than 10 visits)	8.1%	6.1%	8.0%	6.0%	6.1%

#### What did motivate them to come?



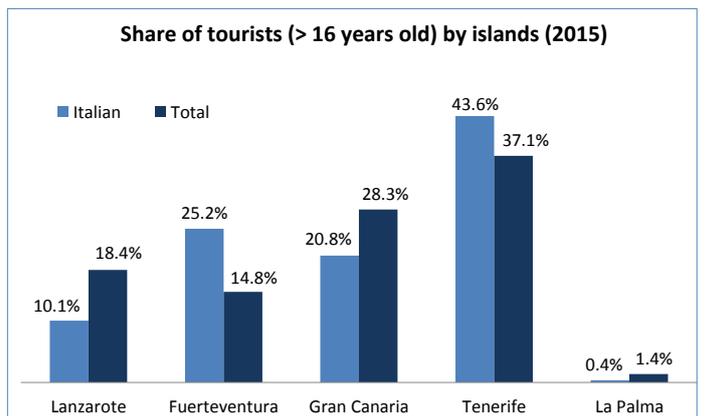
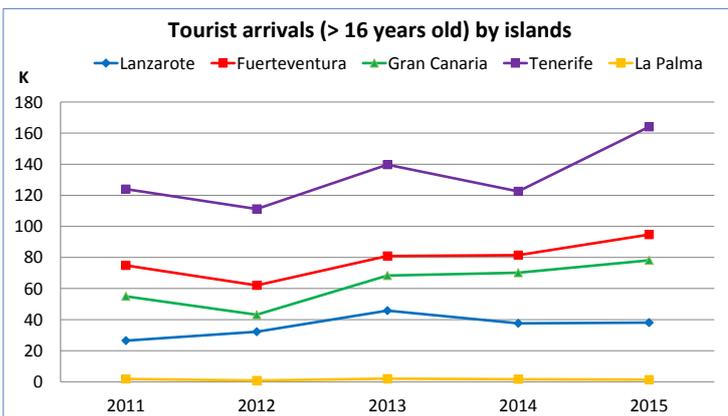
Aspects motivating the choice	2011	2012	2013	2014	2015
Previous visits to the Canary Islands	43.5%	44.8%	48.7%	41.2%	42.7%
Recommendation by friends or relatives	39.4%	40.6%	43.6%	44.3%	46.3%
The Canary Islands television channel	0.9%	0.0%	0.4%	0.8%	1.0%
Other television or radio channels	1.3%	0.9%	0.3%	1.5%	0.9%
Information in the press/magazines/books	10.4%	8.6%	7.9%	8.5%	9.5%
Attendance at a tourism fair	0.6%	0.4%	0.9%	1.0%	0.3%
Tour Operator's brochure or catalogue	11.6%	8.7%	7.6%	7.8%	6.0%
Recommendation by Travel Agency	20.5%	15.9%	12.5%	13.9%	13.0%
Information obtained via the Internet	28.2%	31.4%	28.2%	32.2%	31.3%
Senior Tourism programme	0.3%	0.2%	0.6%	0.4%	0.2%
Others	5.2%	5.0%	6.0%	4.0%	3.4%

\* Multi-choice question

#### Where does the flight come from?



Ten main origin countries	2011	2012	2013	2014	2015
Italy	203,748	205,374	230,492	225,439	278,992
Spain	67,975	40,126	101,077	79,779	83,893
Germany	3,471	3,220	2,597	3,508	7,690
Poland	1,222	764	1,474	2,612	2,445
Others	2,218	296	820	1,515	1,234
Austria	0	399	337	0	723
France	853	0	0	219	653
Ireland	0	0	0	0	622
Switzerland	967	189	480	555	405
Belgium	1,762	759	0	323	117



Source: ISTAC (Encuesta sobre el Gasto Turístico).

Note: Tourists under 16 years old are excluded. In order to calculate percentages, "Not applicable" and "No answer" have been excluded.