

Tourist profile trend (2016)

Canary Islands: Austrian market



How many are they and how much do they spend?



	2012	2013	2014	2015	2016
Tourist arrivals (> 16 years old)	103,587	188,971	99,027	115,889	176,662
Average daily expenditure (€)	144.80	146.06	145.27	151.54	151.94
- in their place of residence	108.22	112.83	110.31	112.70	116.53
- in the Canary Islands	36.58	33.23	34.97	38.84	35.41
Average length of stay	10.70	11.07	10.92	10.32	10.04
Turnover per tourist (€)	1,356	1,360	1,414	1,384	1,356
Total turnover (> 16 years old) (€m)	140	257	140	160	240
Austrian turnover: year on year change	--	82.9%	-45.5%	14.6%	49.4%
Austrian tourist arrivals: year on year change	--	82.4%	-47.6%	17.0%	52.4%

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

Accommodation (**):	54.48	50.97	35.43	57.03	44.06
- Accommodation	44.19	44.54	27.39	46.66	34.75
- Additional accommodation expenses	10.29	6.43	8.04	10.38	9.31
Transport:	35.51	30.20	28.54	32.13	28.52
- Public transport	4.40	4.01	6.09	3.35	3.45
- Taxi	4.12	5.24	3.09	4.59	4.36
- Car rental	26.99	20.96	19.36	24.19	20.70
Food and drink:	125.07	122.70	145.50	150.15	133.21
- Food purchases at supermarkets	52.65	55.92	61.68	73.82	50.73
- Restaurants	72.42	66.78	83.82	76.33	82.48
Souvenirs:	72.70	64.47	78.56	63.22	61.68
Leisure:	50.58	54.58	42.93	45.41	49.38
- Organized excursions	18.28	22.46	18.55	23.08	24.61
- Leisure, amusement	8.42	8.95	5.57	7.57	6.53
- Trip to other islands	4.10	4.20	4.07	1.05	2.12
- Sporting activities	13.62	11.40	9.38	6.99	10.23
- Cultural activities	1.13	3.99	2.18	2.88	3.29
- Discos and disco-pubs	5.03	3.57	3.19	3.83	2.60
Others:	29.12	76.92	158.66	16.41	14.20
- Wellness	11.92	3.60	4.04	5.93	4.12
- Medical expenses	2.13	1.86	1.28	2.43	0.76
- Other expenses	15.07	71.45	153.34	8.05	9.33

How far in advance do they book their trip?



	2012	2013	2014	2015	2016
The same day they leave	0.1%	0.7%	0.6%	0.9%	0.0%
Between 2 and 7 days	5.5%	8.4%	5.1%	5.7%	3.1%
Between 8 and 15 days	14.8%	10.0%	10.5%	6.8%	8.0%
Between 16 and 30 days	17.5%	16.6%	11.3%	12.4%	13.8%
Between 31 and 90 days	31.2%	31.8%	32.5%	36.5%	34.1%
More than 90 days	30.8%	32.4%	40.1%	37.7%	41.0%

What do they book at their place of residence?



	2012	2013	2014	2015	2016
Flight only	8.6%	5.6%	7.2%	7.9%	7.0%
Flight and accommodation (room only)	11.9%	14.9%	14.0%	16.9%	13.3%
Flight and accommodation (B&B)	4.8%	6.5%	10.2%	12.1%	10.7%
Flight and accommodation (half board)	40.7%	33.7%	33.6%	30.6%	36.2%
Flight and accommodation (full board)	1.6%	3.1%	4.0%	2.6%	2.7%
Flight and accommodation (all inclusive)	32.3%	36.2%	31.0%	29.8%	30.0%
% Tourists using low-cost airlines	32.6%	28.9%	30.0%	26.8%	33.1%
Other expenses in their place of residence:					
- Car rental	16.7%	16.0%	16.1%	20.2%	18.2%
- Sporting activities	7.6%	8.8%	7.7%	8.7%	10.1%
- Excursions	10.9%	10.7%	9.2%	12.0%	10.6%
- Trip to other islands	2.6%	3.3%	2.7%	1.2%	1.4%

(*) 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.

How do they book?



	2012	2013	2014	2015	2016
Accommodation booking					
Tour Operator	47.6%	43.1%	42.4%	41.0%	40.0%
- Tour Operator's website	51.2%	55.8%	53.2%	61.5%	60.7%
Accommodation	4.4%	4.6%	8.4%	8.3%	8.1%
- Accommodation's website	85.8%	60.0%	90.7%	93.4%	83.7%
Travel agency (High street)	28.0%	34.4%	30.7%	32.9%	31.8%
Online Travel Agency (OTA)	14.3%	14.6%	13.0%	15.2%	16.4%
No need to book accommodation	5.7%	3.3%	5.5%	2.6%	3.6%

	2012	2013	2014	2015	2016
Flight booking					
Tour Operator	48.8%	42.9%	46.7%	41.2%	46.7%
- Tour Operator's website	48.5%	50.4%	58.0%	55.4%	59.4%
Airline	8.3%	7.3%	11.2%	13.6%	9.7%
- Airline's website	92.3%	71.0%	76.6%	87.9%	97.9%
Travel agency (High street)	28.5%	35.2%	30.7%	31.7%	29.7%
Online Travel Agency (OTA)	14.4%	14.6%	11.5%	13.5%	14.0%

Where do they stay?



	2012	2013	2014	2015	2016
5* Hotel	8.2%	6.7%	11.3%	7.8%	6.8%
4* Hotel	49.9%	48.9%	50.4%	45.8%	46.8%
1-2-3* Hotel	15.5%	18.8%	11.0%	11.4%	13.2%
Apartment	21.0%	22.0%	20.0%	28.8%	28.2%
Property (privately-owned, friends, family)	4.7%	2.4%	5.4%	2.5%	3.1%
Others	0.7%	1.3%	1.9%	3.7%	2.0%

Who are they?



	2012	2013	2014	2015	2016
Gender					
Percentage of men	49.4%	43.1%	45.0%	50.4%	46.2%
Percentage of women	50.6%	56.9%	55.0%	49.6%	53.8%

	2012	2013	2014	2015	2016
Age					
Average age (tourists > 16 years old)	43.5	41.8	45.2	45.6	46.4
Standard deviation	14.6	14.3	14.7	15.2	15.4

	2012	2013	2014	2015	2016
Age range (> 16 years old)					
16-24 years old	10.7%	10.8%	10.3%	10.1%	9.7%
25-30 years old	14.6%	19.4%	9.8%	11.5%	10.3%
31-45 years old	29.1%	28.2%	30.0%	25.6%	23.7%
46-60 years old	31.4%	31.2%	35.5%	36.8%	39.3%
Over 60 years old	14.1%	10.5%	14.4%	16.0%	17.1%

	2012	2013	2014	2015	2016
Occupation					
Business owner or self-employed	18.0%	16.7%	16.6%	20.8%	14.7%
Upper/Middle management employee	49.9%	50.7%	47.7%	47.5%	51.9%
Auxiliary level employee	11.4%	13.2%	9.0%	9.9%	9.7%
Students	4.6%	5.7%	6.8%	5.2%	6.3%
Retired	15.1%	11.5%	18.4%	15.1%	16.4%
Unemployed / unpaid dom. work	1.0%	2.2%	1.4%	1.5%	1.1%

	2012	2013	2014	2015	2016
Annual household income level					
€12,000 - €24,000	22.9%	24.7%	23.9%	24.2%	20.4%
€24,001 - €36,000	23.9%	25.2%	20.8%	25.3%	20.8%
€36,001 - €48,000	19.2%	15.4%	19.8%	20.5%	13.5%
€48,001 - €60,000	14.7%	12.2%	13.8%	10.7%	19.3%
€60,001 - €72,000	5.9%	5.5%	7.9%	6.1%	8.0%
€72,001 - €84,000	3.3%	5.2%	5.1%	3.9%	5.1%
More than €84,000	10.2%	11.8%	8.7%	9.3%	12.9%

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Which island do they choose?

Tourists (> 16 years old)	2012	2013	2014	2015	2016
- Lanzarote	9,861	20,432	15,158	14,077	16,808
- Fuerteventura	14,473	54,272	14,337	13,664	31,452
- Gran Canaria	36,104	32,987	26,765	36,022	40,948
- Tenerife	38,067	76,304	36,192	40,479	67,718
- La Palma	3,598	3,831	5,487	10,265	16,435

Share (%)	2012	2013	2014	2015	2016
- Lanzarote	9.7%	10.9%	15.5%	12.3%	9.7%
- Fuerteventura	14.2%	28.9%	14.6%	11.9%	18.1%
- Gran Canaria	35.4%	17.6%	27.3%	31.5%	23.6%
- Tenerife	37.3%	40.6%	37.0%	35.4%	39.1%
- La Palma	3.5%	2.0%	5.6%	9.0%	9.5%

Who do they come with?

	2012	2013	2014	2015	2016
Unaccompanied	13.5%	9.6%	10.7%	9.2%	10.0%
Only with partner	55.5%	46.8%	54.3%	56.4%	56.3%
Only with children (under the age of 13)	0.4%	1.8%	1.3%	0.5%	0.8%
Partner + children (under the age of 13)	6.9%	7.9%	7.3%	8.4%	8.6%
Other relatives	4.6%	5.6%	6.6%	4.1%	5.0%
Friends	6.3%	9.2%	4.6%	6.6%	5.2%
Work colleagues	0.0%	0.3%	0.6%	0.2%	0.1%
Other combinations ⁽¹⁾	12.8%	18.7%	14.6%	14.6%	14.1%

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

How do they rate the destination?

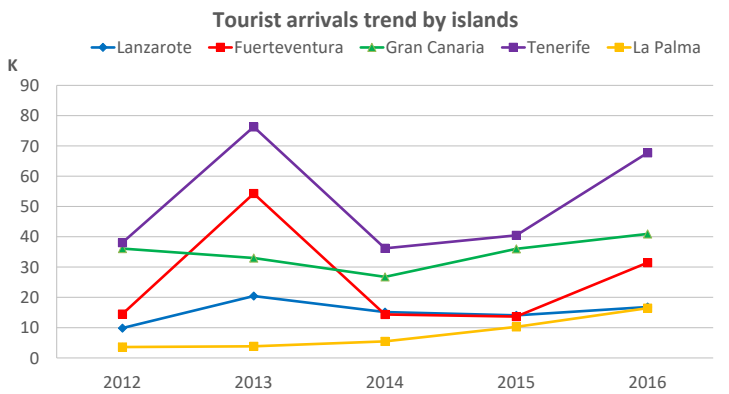
Impression of their stay	2012	2013	2014	2015	2016
Good or very good (% tourists)	93.0%	93.9%	92.1%	95.9%	96.4%
Average rating (scale 1-10)	8.86	9.06	8.97	9.18	9.25

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012	2013	2014	2015	2016
Repeat tourists	66.8%	66.4%	71.5%	67.5%	67.4%
In love (at least 10 previous visits)	13.4%	8.1%	17.1%	12.3%	16.8%

Where does the flight come from?

Ten main origin countries	2012	2013	2014	2015	2016
Austria	70,424	126,240	65,424	63,030	98,315
Germany	24,133	47,013	23,027	35,600	54,169
Spanish Mainland	5,448	10,431	8,660	13,042	14,710
Switzerland	2,344	3,848	1,420	3,029	7,969
Belgium	463	915	0	100	536
United Kingdom	0	0	0	0	293
Norway	0	0	0	212	242
Czech Republic	0	0	0	0	158
Netherlands	0	0	0	293	0
Ireland	0	0	61	0	0



Why do they choose the Canary Islands?

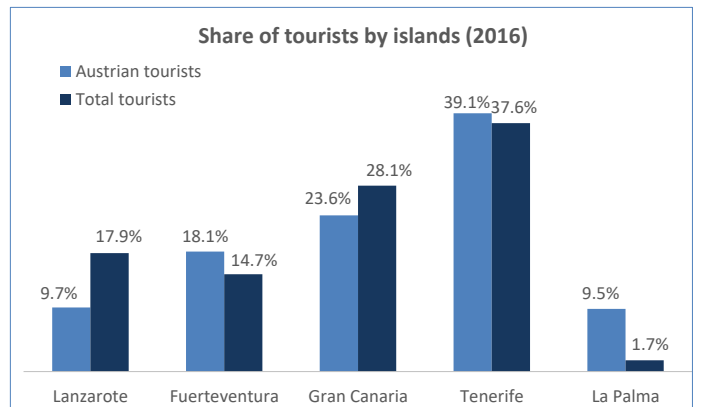
Aspects influencing the choice	2012	2013	2014	2015	2016
Climate/sun	93.5%	89.5%	89.0%	88.8%	88.9%
Scenery	31.4%	29.9%	33.6%	43.8%	37.8%
Tranquillity/rest/relaxation	33.8%	38.9%	41.4%	31.3%	35.8%
Beaches	38.5%	41.5%	37.0%	35.1%	35.5%
Visiting new places	16.5%	18.7%	15.0%	14.1%	19.4%
Security	8.9%	5.8%	6.8%	10.3%	19.3%
Active tourism	9.3%	9.4%	10.1%	15.1%	9.7%
Ease of travel	7.0%	6.3%	6.4%	4.9%	6.7%
Nautical activities	4.5%	6.7%	4.0%	3.1%	4.5%
Price	5.5%	3.8%	2.6%	3.9%	4.0%
Quality of the environment	3.8%	4.1%	4.4%	4.5%	3.8%
Theme parks	3.8%	6.7%	4.9%	4.0%	3.4%
Suitable destination for children	2.6%	4.8%	2.6%	2.6%	3.0%
Culture	2.6%	2.9%	2.5%	2.5%	2.9%
Shopping	2.9%	2.8%	1.8%	2.5%	2.1%
Rural tourism	1.7%	2.3%	1.9%	0.8%	1.2%

* Multi-choice question

What did motivate them to come?

Aspects motivating the choice	2012	2013	2014	2015	2016
Previous visits to the Canary Islands	58.4%	52.4%	59.5%	57.2%	54.3%
Recommendation by friends or relatives	30.3%	33.7%	31.3%	29.7%	34.3%
The Canary Islands television channel	0.4%	0.2%	0.6%	0.8%	0.9%
Other television or radio channels	2.6%	1.8%	2.7%	2.2%	2.3%
Information in the press/magazines/books	6.6%	5.4%	6.3%	4.5%	4.3%
Attendance at a tourism fair	0.6%	0.3%	0.6%	0.7%	0.0%
Tour Operator's brochure or catalogue	14.9%	11.7%	11.1%	13.1%	10.5%
Recommendation by Travel Agency	11.8%	16.0%	9.1%	12.0%	12.2%
Information obtained via the Internet	22.8%	23.8%	20.8%	27.6%	29.2%
Senior Tourism programme	0.3%	0.0%	0.0%	0.0%	0.0%
Others	7.7%	5.6%	7.4%	4.5%	3.7%

* 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.