

## Tourist profile trend (2017)

### AUSTRIA

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



	2013	2014	2015	2016	2017
Tourist arrivals (FRONTUR)	n.d.	n.d.	n.d.	n.d.	n.d.
Tourist arrivals (> 16 years old)	--	99,027	115,889	176,662	134,428
Average daily expenditure (€)	--	145.27	151.54	151.94	159.73
. in their place of residence	--	110.31	112.70	116.53	119.47
. in the Canary Islands	--	34.97	38.84	35.41	40.25
Average length of stay	--	10.92	10.32	10.04	11.24
Turnover per tourist (€)	--	1,414	1,384	1,356	1,546
Total turnover (> 16 years old) (€m)	--	140	160	240	208
Tourist arrivals: year on year change	--	--	17.0%	52.4%	-23.9%
Turnover: year on year change	--	--	14.6%	49.4%	-13.3%
<u>% tourists who pay in the Canary Islands:</u>					
<b>Accommodation:</b>					
- Accommodation	--	12.8%	15.6%	10.2%	13.7%
- Additional accommodation expenses	--	6.9%	9.1%	9.2%	8.5%
<b>Transport:</b>					
- Public transport	--	15.3%	12.5%	12.0%	10.7%
- Taxi	--	11.5%	14.8%	12.2%	12.9%
- Car rental	--	21.1%	26.1%	25.5%	24.6%
<b>Food and drink:</b>					
- Food purchases at supermarkets	--	51.4%	55.4%	43.7%	50.6%
- Restaurants	--	49.2%	49.8%	52.1%	60.1%
<b>Souvenirs:</b>	--	62.1%	56.7%	57.1%	55.3%
<b>Leisure:</b>					
- Organized excursions	--	21.4%	21.6%	21.5%	18.6%
- Leisure, amusement	--	9.9%	10.9%	10.2%	8.7%
- Trip to other islands	--	3.2%	1.5%	2.5%	2.9%
- Sporting activities	--	10.1%	8.1%	8.6%	7.8%
- Cultural activities	--	4.7%	5.1%	6.1%	3.8%
- Discos and disco-pubs	--	2.3%	4.9%	3.3%	3.6%
<b>Others:</b>					
- Wellness	--	6.2%	5.7%	5.3%	4.3%
- Medical expenses	--	3.1%	4.2%	1.8%	5.2%
- Other expenses	--	6.9%	9.8%	7.2%	8.7%

2017



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



	2013	2014	2015	2016	2017
Flight only	--	7.2%	7.9%	7.0%	7.7%
Flight and accommodation (room only)	--	14.0%	16.9%	13.3%	17.6%
Flight and accommodation (B&B)	--	10.2%	12.1%	10.7%	14.7%
Flight and accommodation (half board)	--	33.6%	30.6%	36.2%	33.2%
Flight and accommodation (full board)	--	4.0%	2.6%	2.7%	4.0%
Flight and accommodation (all inclusive)	--	31.0%	29.8%	30.0%	22.7%
<u>% Tourists using low-cost airlines</u>	--	30.0%	26.8%	33.1%	35.3%
<u>Other expenses in their place of residence:</u>					
- Car rental	--	16.1%	20.2%	18.2%	22.5%
- Sporting activities	--	7.7%	8.7%	10.1%	5.6%
- Excursions	--	9.2%	12.0%	10.6%	9.6%
- Trip to other islands	--	2.7%	1.2%	1.4%	2.2%

\* Tourists over 16 years old.

#### How do they book?



	2013	2014	2015	2016	2017
<u>Accommodation booking</u>					
<b>Tour Operator</b>	--	42.4%	41.0%	40.0%	37.9%
- Tour Operator's website	--	53.2%	61.5%	60.7%	59.0%
<b>Accommodation</b>	--	8.4%	8.3%	8.1%	8.8%
- Accommodation's website	--	90.7%	93.4%	83.7%	80.6%
<b>Travel agency (High street)</b>	--	30.7%	32.9%	31.8%	31.5%
<b>Online Travel Agency (OTA)</b>	--	13.0%	15.2%	16.4%	16.7%
<b>No need to book accommodation</b>	--	5.5%	2.6%	3.6%	5.2%
<u>Flight booking</u>					
<b>Tour Operator</b>	--	46.7%	41.2%	46.7%	41.8%
- Tour Operator's website	--	58.0%	55.4%	59.4%	50.6%
<b>Airline</b>	--	11.2%	13.6%	9.7%	16.8%
- Airline's website	--	76.6%	87.9%	97.9%	97.9%
<b>Travel agency (High street)</b>	--	30.7%	31.7%	29.7%	27.0%
<b>Online Travel Agency (OTA)</b>	--	11.5%	13.5%	14.0%	14.4%

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



	2013	2014	2015	2016	2017
The same day they leave	--	0.6%	0.9%	0.0%	0.0%
Between 2 and 7 days	--	5.1%	5.7%	3.1%	3.3%
Between 8 and 15 days	--	10.5%	6.8%	8.0%	4.7%
Between 16 and 30 days	--	11.3%	12.4%	13.8%	14.2%
Between 31 and 90 days	--	32.5%	36.5%	34.1%	34.8%
More than 90 days	--	40.1%	37.7%	41.0%	43.0%

#### Who are they?



	2013	2014	2015	2016	2017
<u>Gender</u>					
Men	--	45.0%	50.4%	46.2%	49.7%
Women	--	55.0%	49.6%	53.8%	50.3%
<u>Age</u>					
Average age (tourists > 16 years old)	--	45.2	45.6	46.4	49.5
Standard deviation	--	14.7	15.2	15.4	16.5
<u>Age range (&gt; 16 years old)</u>					
16-24 years old	--	10.3%	10.1%	9.7%	8.9%
25-30 years old	--	9.8%	11.5%	10.3%	10.4%
31-45 years old	--	30.0%	25.6%	23.7%	18.6%
46-60 years old	--	35.5%	36.8%	39.3%	32.4%
Over 60 years old	--	14.4%	16.0%	17.1%	29.7%
<u>Occupation</u>					
Business owner or self-employed	--	16.6%	20.8%	14.7%	14.7%
Upper/Middle management employee	--	47.7%	47.5%	51.9%	42.4%
Auxiliary level employee	--	9.0%	9.9%	9.7%	10.2%
Students	--	6.8%	5.2%	6.3%	5.2%
Retired	--	18.4%	15.1%	16.4%	25.3%
Unemployed / unpaid dom. work	--	1.4%	1.5%	1.1%	2.1%
<u>Annual household income level</u>					
€12,000 - €24,000	--	23.9%	24.2%	20.4%	22.6%
€24,001 - €36,000	--	20.8%	25.3%	20.8%	26.4%
€36,001 - €48,000	--	19.8%	20.5%	13.5%	16.4%
€48,001 - €60,000	--	13.8%	10.7%	19.3%	12.2%
€60,001 - €72,000	--	7.9%	6.1%	8.0%	5.2%
€72,001 - €84,000	--	5.1%	3.9%	5.1%	5.9%
More than €84,000	--	8.7%	9.3%	12.9%	11.3%

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#### Which island do they choose?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
- Lanzarote	--	15,158	14,077	16,808	9,630
- Fuerteventura	--	14,337	13,664	31,452	14,298
- Gran Canaria	--	26,765	36,022	40,948	41,390
- Tenerife	--	36,192	40,479	67,718	58,900
- La Palma	--	5,487	10,265	16,435	9,487

#### Where do they stay?

	2013	2014	2015	2016	2017
5* Hotel	--	11.3%	7.8%	6.8%	9.0%
4* Hotel	--	50.4%	45.8%	46.8%	46.4%
1-2-3* Hotel	--	11.0%	11.4%	13.2%	10.6%
Apartment	--	20.0%	28.8%	28.2%	26.9%
Property (privately-owned, friends, family)	--	5.4%	2.5%	3.1%	3.4%
Others	--	1.9%	3.7%	2.0%	3.8%

#### Who do they come with?

	2013	2014	2015	2016	2017
Unaccompanied	--	10.7%	9.2%	10.0%	7.7%
Only with partner	--	54.3%	56.4%	56.3%	58.5%
Only with children (under the age of 13)	--	1.3%	0.5%	0.8%	1.7%
Partner + children (under the age of 13)	--	7.3%	8.4%	8.6%	4.6%
Other relatives	--	6.6%	4.1%	5.0%	2.8%
Friends	--	4.6%	6.6%	5.2%	6.4%
Work colleagues	--	0.6%	0.2%	0.1%	0.7%
Other combinations <sup>(1)</sup>	--	14.6%	14.6%	14.1%	17.6%

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

#### How do they rate the Canary Islands?

Impression of their stay	2013	2014	2015	2016	2017
Good or very good (% tourists)	--	92.1%	95.9%	96.4%	93.4%
Average rating (scale 1-10)	--	8.97	9.18	9.25	9.06

#### How many are loyal to the Canary Islands?

Repeat tourists	2013	2014	2015	2016	2017
At least 1 previous visit	--	71.5%	67.5%	67.4%	72.2%
At least 10 previous visits	--	17.1%	12.3%	16.8%	17.2%

#### Where does the flight come from?

Tourists (> 16 years old)	2013	2014	2015	2016	2017
Austria	--	66.1%	54.4%	55.7%	50.6%
Germany	--	23.3%	30.7%	30.7%	31.5%
Spanish Mainland	--	8.7%	11.3%	8.3%	14.3%
Switzerland	--	1.4%	2.6%	4.5%	2.2%
United Kingdom	--	0.0%	0.0%	0.2%	0.5%
Belgium	--	0.0%	0.1%	0.3%	0.3%
Sweden	--	0.0%	0.0%	0.0%	0.1%
Netherlands	--	0.0%	0.3%	0.0%	0.0%
Ireland	--	0.1%	0.0%	0.0%	0.0%
Others	--	0.4%	0.7%	0.4%	0.5%

Share (%)	2013	2014	2015	2016	2017
- Lanzarote	--	15.5%	12.3%	9.7%	7.2%
- Fuerteventura	--	14.6%	11.9%	18.1%	10.7%
- Gran Canaria	--	27.3%	31.5%	23.6%	31.0%
- Tenerife	--	37.0%	35.4%	39.1%	44.1%
- La Palma	--	5.6%	9.0%	9.5%	7.1%

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

Aspects influencing the choice	2013	2014	2015	2016	2017
Climate/sun	--	89.0%	88.8%	88.9%	92.3%
Beaches	--	37.0%	35.1%	35.5%	38.1%
Scenery	--	33.6%	43.8%	37.8%	33.7%
Tranquility/rest/relaxation	--	41.4%	31.3%	35.8%	32.4%
Security	--	6.8%	10.3%	19.3%	17.2%
Visiting new places	--	15.0%	14.1%	19.4%	16.6%
Active tourism	--	10.1%	15.1%	9.7%	8.2%
Ease of travel	--	6.4%	4.9%	6.7%	5.5%
Price	--	2.6%	3.9%	4.0%	4.4%
Nautical activities	--	4.0%	3.1%	4.5%	4.1%
Quality of the environment	--	4.4%	4.5%	3.8%	2.9%
Theme parks	--	4.9%	4.0%	3.4%	2.8%
Culture	--	2.5%	2.5%	2.9%	2.4%
Golf	--	2.1%	1.1%	0.9%	2.3%
Suitable destination for children	--	2.6%	2.6%	3.0%	2.3%
Security against natural catastrophes	--	0.8%	0.3%	0.5%	2.1%

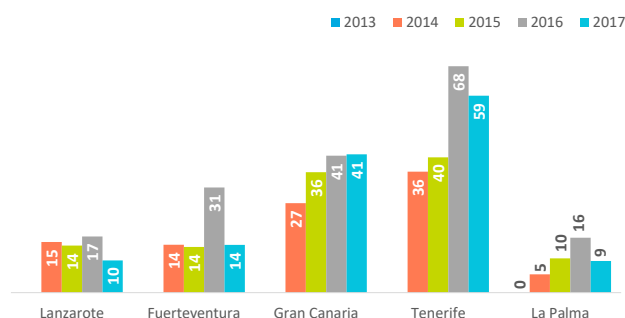
\* Multi-choice question

#### What did motivate them to come?

Prescription sources	2013	2014	2015	2016	2017
Previous visits to the Canary Islands	--	59.5%	57.2%	54.3%	61.5%
Recommendation by friends/relatives	--	31.3%	29.7%	34.3%	36.2%
The Canary Islands television channel	--	0.6%	0.8%	0.9%	0.7%
Other television or radio channels	--	2.7%	2.2%	2.3%	0.5%
Information in press/magazines/books	--	6.3%	4.5%	4.3%	4.1%
Attendance at a tourism fair	--	0.6%	0.7%	0.0%	0.9%
Tour Operator's brochure or catalogue	--	11.1%	13.1%	10.5%	10.2%
Recommendation by Travel Agency	--	9.1%	12.0%	12.2%	11.0%
Information obtained via the Internet	--	20.8%	27.6%	29.2%	24.2%
Senior Tourism programme	--	0.0%	0.0%	0.0%	0.2%
Others	--	7.4%	4.5%	3.7%	5.7%

\* Multi-choice question

#### Tourist arrivals by islands (thousands)



Tourists over 16 years old.

Source: Encuesta sobre el Gasto Turístico (ISTAC). (1) Combination of some groups previously analyzed. The information of 2013 is not shown due to sample failure.

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