

## Tourist profile trend (2016)

### Austria: Fourth Quarter

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



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Tourist arrivals (> 16 years old)	25,776	48,948	25,512	30,066	47,081
Average daily expenditure (€)	151.50	152.03	147.85	147.15	158.82
. in their place of residence	110.17	115.82	100.93	109.33	121.06
. in the Canary Islands	41.33	36.21	46.92	37.82	37.76
Average length of stay	8.97	10.20	11.36	10.67	9.88
Turnover per tourist (€)	1,259	1,319	1,419	1,447	1,390
Total turnover (> 16 years old) (€m)	32.5	64.5	36.2	43.5	65.4
Share of total turnover	23.1%	25.1%	25.9%	27.1%	27.3%
Share of total tourist	24.9%	25.9%	25.8%	25.9%	26.7%

Expenditure in the Canary Islands per tourist and trip (€) <sup>(*)</sup>					
<b>Accommodation (**):</b>	37.48	43.64	63.03	72.55	43.21
- Accommodation	29.85	38.36	46.14	62.38	32.81
- Additional accommodation expenses	7.63	5.28	16.89	10.17	10.39
<b>Transport:</b>	27.90	24.17	31.57	35.13	29.50
- Public transport	5.42	3.11	5.27	5.64	4.75
- Taxi	2.86	3.30	3.37	3.94	9.19
- Car rental	19.62	17.77	22.93	25.55	15.56
<b>Food and drink:</b>	101.77	127.76	178.58	147.26	132.66
- Food purchases at supermarkets	46.36	52.61	84.38	64.78	38.44
- Restaurants	55.41	75.15	94.19	82.48	94.22
<b>Souvenirs:</b>	84.33	71.40	97.96	59.03	83.15
<b>Leisure:</b>	42.09	56.66	46.89	37.00	48.55
- Organized excursions	19.17	17.90	15.24	20.26	19.76
- Leisure, amusement	4.53	8.94	4.08	5.61	6.01
- Trip to other islands	5.34	1.84	9.71	0.40	2.53
- Sporting activities	10.69	16.41	12.44	6.02	13.59
- Cultural activities	0.48	7.92	2.16	1.87	1.20
- Discos and disco-pubs	1.88	3.66	3.26	2.83	5.46
<b>Others:</b>	50.78	27.20	583.06	12.16	6.52
- Wellness	32.71	5.31	2.11	6.29	3.41
- Medical expenses	0.62	0.44	3.01	1.62	0.06
- Other expenses	17.45	21.44	577.93	4.25	3.05

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



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
The same day they leave	0.0%	0.6%	1.3%	1.2%	0.0%
Between 2 and 7 days	4.4%	8.1%	7.1%	7.7%	4.7%
Between 8 and 15 days	16.7%	10.0%	10.7%	5.7%	5.4%
Between 16 and 30 days	23.6%	19.3%	9.9%	16.7%	9.0%
Between 31 and 90 days	36.9%	32.0%	33.9%	35.5%	39.8%
More than 90 days	18.5%	29.9%	37.1%	33.1%	41.1%

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



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Flight only	11.3%	8.1%	13.3%	7.4%	8.1%
Flight and accommodation (room only)	10.7%	16.1%	17.0%	13.4%	13.7%
Flight and accommodation (B&B)	5.5%	12.3%	13.3%	14.2%	15.7%
Flight and accommodation (half board)	37.6%	33.1%	31.4%	34.2%	29.3%
Flight and accommodation (full board)	3.4%	2.7%	3.4%	5.0%	3.0%
Flight and accommodation (all inclusive)	31.5%	27.7%	21.7%	25.6%	30.2%
<b>% Tourists using low-cost airlines</b>	28.9%	31.5%	27.0%	36.4%	37.8%
<b>Other expenses in their place of residence:</b>					
- Car rental	15.7%	19.0%	11.5%	14.4%	15.4%
- Sporting activities	7.1%	10.4%	5.8%	8.8%	8.1%
- Excursions	11.2%	9.9%	7.1%	11.8%	8.1%
- Trip to other islands	1.3%	3.4%	1.0%	1.1%	1.9%

#### How do they book?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Accommodation booking</b>					
<b>Tour Operator</b>	32.4%	30.9%	36.7%	43.1%	36.9%
- Tour Operator's website	66.5%	41.1%	26.3%	60.8%	44.1%
<b>Accommodation</b>	3.1%	4.9%	8.5%	6.3%	9.1%
- Accommodation's website	100.0%	78.7%	86.4%	83.3%	81.0%
<b>Travel agency (High street)</b>	44.1%	42.2%	32.9%	33.5%	36.4%
<b>Online Travel Agency (OTA)</b>	12.8%	17.3%	12.4%	15.3%	14.2%
<b>No need to book accommodation</b>	7.5%	4.7%	9.5%	1.8%	3.4%

	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Flight booking</b>					
<b>Tour Operator</b>	35.2%	35.6%	39.9%	41.3%	37.5%
- Tour Operator's website	56.6%	43.5%	49.0%	51.6%	67.8%
<b>Airline</b>	6.8%	6.0%	19.2%	12.4%	11.5%
- Airline's website	100.0%	61.9%	79.0%	100.0%	93.4%
<b>Travel agency (High street)</b>	44.2%	39.4%	30.9%	32.5%	38.3%
<b>Online Travel Agency (OTA)</b>	13.7%	19.0%	10.0%	13.8%	12.7%

#### Where do they stay?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
5* Hotel	7.3%	9.3%	12.7%	11.4%	6.2%
4* Hotel	49.6%	40.9%	47.9%	41.0%	46.5%
1-2-3* Hotel	17.7%	21.9%	10.6%	16.4%	7.7%
Apartment	19.4%	23.3%	18.3%	24.7%	34.6%
Property (privately-owned, friends, family)	5.5%	3.2%	9.5%	1.6%	2.4%
Others	0.6%	1.3%	1.0%	4.9%	2.6%

#### Who are they?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
<b>Gender</b>					
Percentage of men	57.2%	38.9%	43.3%	57.0%	46.6%
Percentage of women	42.8%	61.1%	56.7%	43.0%	53.4%
<b>Age</b>					
Average age (tourists > 16 years old)	45.1	43.9	49.3	49.3	49.4
Standard deviation	13.8	14.0	14.3	15.6	13.8
<b>Age range (&gt; 16 years old)</b>					
16-24 years old	10.0%	3.3%	3.3%	6.4%	5.4%
25-30 years old	6.3%	22.1%	8.8%	8.1%	4.3%
31-45 years old	29.5%	27.9%	29.5%	22.6%	27.2%
46-60 years old	39.2%	34.1%	37.4%	38.2%	45.0%
Over 60 years old	15.0%	12.6%	21.0%	24.6%	18.1%
<b>Occupation</b>					
Business owner or self-employed	21.2%	17.4%	18.7%	26.0%	14.3%
Upper/Middle management employee	46.7%	57.5%	46.5%	42.1%	58.0%
Auxiliary level employee	16.4%	5.4%	4.6%	5.0%	3.8%
Students	2.0%	3.5%	2.0%	2.1%	5.9%
Retired	13.6%	14.7%	26.9%	22.8%	17.0%
Unemployed / unpaid dom. work	0.0%	1.4%	1.3%	1.8%	1.0%
<b>Annual household income level</b>					
€12,000 - €24,000	26.8%	23.4%	18.7%	21.2%	16.6%
€24,001 - €36,000	20.2%	25.3%	21.2%	29.8%	19.2%
€36,001 - €48,000	19.4%	10.4%	10.3%	20.0%	12.2%
€48,001 - €60,000	15.4%	14.0%	20.3%	9.6%	28.7%
€60,001 - €72,000	8.3%	5.6%	18.0%	4.6%	6.6%
€72,001 - €84,000	2.4%	8.2%	1.5%	4.6%	4.2%
More than €84,000	7.4%	13.0%	10.1%	10.3%	12.5%

(\*) 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.

## Tourist profile trend (2016)

### Austria: Fourth Quarter

#### Which island do they choose?



Tourists (> 16 years old)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	1,720	6,159	3,937	3,049	4,788
- Fuerteventura	3,356	7,451	3,552	2,862	5,332
- Gran Canaria	7,586	10,133	6,430	11,679	11,887
- Tenerife	11,844	23,721	9,832	10,290	15,723
- La Palma	1,118	1,239	1,478	1,913	9,059

Share (%)	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
- Lanzarote	6.7%	12.6%	15.6%	10.2%	10.2%
- Fuerteventura	13.1%	15.3%	14.1%	9.6%	11.4%
- Gran Canaria	29.6%	20.8%	25.5%	39.2%	25.4%
- Tenerife	46.2%	48.7%	39.0%	34.5%	33.6%
- La Palma	4.4%	2.5%	5.9%	6.4%	19.4%

#### Who do they come with?



	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Unaccompanied	16.4%	7.0%	13.0%	11.2%	13.9%
Only with partner	57.8%	53.0%	61.6%	63.6%	55.5%
Only with children (under the age of 13)	0.0%	1.0%	0.0%	0.0%	0.0%
Partner + children (under the age of 13)	3.5%	5.3%	5.0%	1.7%	8.3%
Other relatives	4.7%	9.6%	1.7%	2.7%	4.8%
Friends	8.5%	7.9%	6.9%	7.3%	3.2%
Work colleagues	0.0%	0.0%	0.7%	0.8%	0.2%
Other combinations <sup>(1)</sup>	9.0%	16.2%	11.1%	12.7%	14.1%

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

#### How do they rate the destination?



Impression of their stay	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Good or very good (% tourists)	93.8%	91.6%	90.7%	96.0%	97.0%
Average rating (scale 1-10)	8.75	8.99	8.92	9.30	9.26

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

Repeat tourists of the Canary Islands	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Repeat tourists	66.0%	76.1%	82.1%	69.1%	73.9%
In love (at least 10 previous visits)	9.9%	10.9%	23.6%	13.5%	24.4%

#### Where does the flight come from?



Ten main origin countries	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Austria	67.7%	69.2%	67.5%	54.6%	43.3%
Germany	27.8%	25.6%	24.6%	30.8%	35.4%
Switzerland	1.1%	0.5%	2.2%	2.1%	12.5%
Spanish Mainland	2.4%	3.6%	5.7%	11.4%	8.2%
Belgium	0.3%	0.0%	0.0%	0.3%	0.0%
Norway	0.0%	0.0%	0.0%	0.7%	0.0%
Denmark	0.0%	0.0%	0.0%	0.0%	0.0%
Finland	0.0%	0.0%	0.0%	0.0%	0.0%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.0%	0.0%

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



Aspects influencing the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Climate/sun	90.6%	95.9%	94.2%	89.7%	94.5%
Tranquillity/rest/relaxation	42.3%	48.3%	46.1%	27.4%	37.9%
Beaches	40.7%	39.0%	31.7%	25.9%	36.2%
Scenery	27.5%	29.0%	27.7%	48.0%	34.6%
Visiting new places	19.2%	14.2%	8.5%	15.0%	21.5%
Security	8.3%	6.4%	5.5%	14.5%	20.2%
Active tourism	10.8%	9.6%	7.0%	19.6%	9.8%
Ease of travel	9.3%	10.0%	8.7%	4.0%	4.8%
Suitable destination for children	1.1%	2.5%	1.0%	1.1%	3.7%
Theme parks	4.0%	6.0%	1.3%	1.8%	3.5%
Culture	0.0%	3.8%	0.0%	3.2%	2.5%
Rural tourism	2.5%	0.6%	3.0%	0.6%	2.0%
Nautical activities	4.0%	3.2%	4.7%	2.3%	1.7%
Quality of the environment	3.6%	5.1%	2.7%	2.8%	1.6%
Price	3.4%	2.7%	3.0%	4.8%	1.5%
Nightlife/fun	2.0%	0.8%	1.7%	2.1%	1.1%

\* Multi-choice question

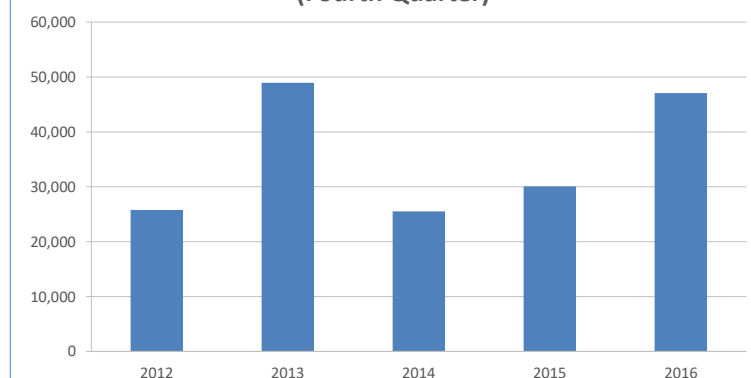
#### What did motivate them to come?



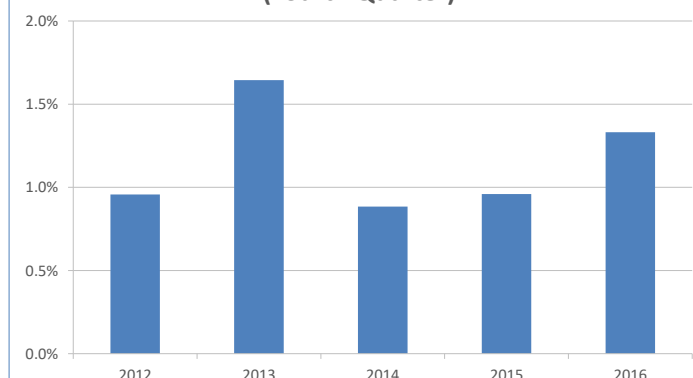
Aspects motivating the choice	2012Q4	2013Q4	2014Q4	2015Q4	2016Q4
Previous visits to the Canary Islands	58.6%	56.4%	68.7%	60.1%	64.8%
Recommendation by friends or relatives	30.7%	30.7%	26.7%	21.6%	28.5%
The Canary Islands television channel	0.0%	0.0%	0.0%	0.0%	0.8%
Other television or radio channels	2.4%	1.2%	3.6%	4.9%	0.0%
Information in the press/magazines/books	9.3%	2.2%	5.9%	7.5%	3.0%
Attendance at a tourism fair	1.3%	0.0%	0.0%	0.0%	0.0%
Tour Operator's brochure or catalogue	13.2%	8.1%	6.4%	11.8%	6.3%
Recommendation by Travel Agency	13.8%	23.9%	5.2%	12.5%	14.7%
Information obtained via the Internet	18.8%	16.3%	16.8%	24.8%	25.7%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	9.4%	6.4%	7.3%	4.8%	3.9%

\* Multi-choice question

Tourist arrivals trend (> 16 years old)  
(Fourth Quarter)



Share of tourists (> 16 years old)  
(Fourth Quarter)



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.