

Tourist profile trend (2016)

Austria: First Quarter

How many are they and how much do they spend?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Tourist arrivals (> 16 years old)	31,300	51,094	27,928	32,138	51,656
Average daily expenditure (€)	145.80	145.44	142.36	149.04	154.33
. in their place of residence	109.27	113.68	112.12	113.86	117.77
. in the Canary Islands	36.53	31.76	30.25	35.17	36.56
Average length of stay	11.18	11.85	11.32	11.64	10.61
Turnover per tourist (€)	1,481	1,408	1,536	1,448	1,451
Total turnover (> 16 years old) (€m)	46.3	71.9	42.9	46.5	75.0
Share of total turnover	33.0%	28.0%	30.6%	29.0%	31.3%
Share of total tourist	30.2%	27.0%	28.2%	27.7%	29.2%

Expenditure in the Canary Islands per tourist and trip (€) (**)					
Accommodation (**):	70.73	36.05	22.93	39.28	59.16
- Accommodation	63.35	35.18	18.73	26.32	50.72
- Additional accommodation expenses	7.38	0.88	4.20	12.97	8.44
Transport:	44.42	35.33	26.76	30.75	32.86
- Public transport	2.89	3.95	5.33	2.96	4.31
- Taxi	6.11	5.57	3.83	4.04	2.28
- Car rental	35.43	25.82	17.60	23.75	26.27
Food and drink:	154.97	142.74	153.78	186.51	166.95
- Food purchases at supermarkets	73.92	63.81	48.66	98.17	70.35
- Restaurants	81.06	78.93	105.12	88.33	96.61
Souvenirs:	66.96	59.42	86.52	60.10	48.12
Leisure:	53.65	49.65	39.22	41.07	44.22
- Organized excursions	8.26	16.08	16.05	21.01	25.62
- Leisure, amusement	11.81	7.07	5.43	8.50	4.71
- Trip to other islands	3.35	5.03	2.94	0.74	1.92
- Sporting activities	18.46	13.37	12.47	4.76	6.84
- Cultural activities	1.52	1.28	1.64	2.12	5.09
- Discos and disco-pubs	10.26	6.81	0.68	3.94	0.03
Others:	22.06	8.45	12.67	16.24	14.81
- Wellness	4.37	3.27	7.11	2.35	4.92
- Medical expenses	1.32	1.33	1.33	0.81	0.36
- Other expenses	16.37	3.85	4.23	13.09	9.53

How far in advance do they book their trip?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
The same day they leave	0.0%	0.6%	0.0%	0.3%	0.0%
Between 2 and 7 days	5.2%	6.7%	2.5%	4.6%	0.8%
Between 8 and 15 days	14.5%	9.7%	8.0%	5.7%	10.7%
Between 16 and 30 days	18.1%	16.1%	13.6%	14.5%	12.8%
Between 31 and 90 days	28.1%	39.1%	32.2%	43.8%	39.1%
More than 90 days	34.1%	27.9%	43.7%	31.2%	36.6%

What do they book at their place of residence?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight only	9.7%	3.3%	6.5%	12.0%	8.8%
Flight and accommodation (room only)	13.7%	19.1%	12.3%	18.6%	19.1%
Flight and accommodation (B&B)	3.7%	6.0%	12.4%	9.8%	10.7%
Flight and accommodation (half board)	41.0%	34.6%	38.3%	37.2%	34.9%
Flight and accommodation (full board)	0.2%	3.5%	5.1%	2.4%	3.5%
Flight and accommodation (all inclusive)	31.7%	33.6%	25.4%	20.0%	23.0%
% Tourists using low-cost airlines	33.9%	25.1%	32.5%	20.8%	30.6%
Other expenses in their place of residence:					
- Car rental	18.2%	23.3%	20.0%	28.1%	23.0%
- Sporting activities	8.3%	4.4%	9.8%	12.8%	8.1%
- Excursions	8.1%	11.2%	6.4%	16.2%	10.3%
- Trip to other islands	0.4%	5.5%	5.1%	2.3%	2.6%

How do they book?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Accommodation booking					
Tour Operator	66.7%	49.6%	47.7%	36.9%	47.6%
- Tour Operator's website	39.6%	54.0%	58.6%	57.8%	69.8%
Accommodation	6.4%	6.9%	6.8%	13.0%	10.8%
- Accommodation's website	100.0%	33.8%	85.6%	91.9%	96.5%
Travel agency (High street)	12.8%	32.0%	28.5%	31.8%	20.2%
Online Travel Agency (OTA)	9.1%	8.9%	11.7%	13.7%	16.6%
No need to book accommodation	4.9%	2.5%	5.4%	4.6%	4.8%

	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Flight booking					
Tour Operator	64.1%	46.9%	53.3%	40.2%	52.1%
- Tour Operator's website	41.0%	51.3%	60.1%	46.8%	67.9%
Airline	12.7%	6.4%	7.8%	21.2%	12.5%
- Airline's website	90.4%	70.1%	83.8%	83.9%	100.0%
Travel agency (High street)	12.8%	33.8%	29.0%	27.3%	20.6%
Online Travel Agency (OTA)	10.5%	13.0%	9.9%	11.3%	14.7%

Where do they stay?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
5* Hotel	5.4%	8.1%	11.0%	5.4%	6.1%
4* Hotel	50.6%	40.3%	48.6%	44.7%	39.8%
1-2-3* Hotel	15.4%	19.7%	11.2%	6.9%	20.0%
Apartment	22.5%	31.5%	21.6%	34.5%	28.2%
Property (privately-owned, friends, family)	4.8%	0.2%	4.5%	4.7%	3.2%
Others	1.3%	0.1%	3.0%	3.7%	2.8%

Who are they?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Gender					
Percentage of men	50.2%	47.1%	45.9%	49.4%	49.8%
Percentage of women	49.8%	52.9%	54.1%	50.6%	50.2%

Age					
Average age (tourists > 16 years old)	48.3	46.6	48.4	50.8	50.8
Standard deviation	14.4	14.5	13.7	13.0	13.0

Age range (> 16 years old)					
16-24 years old	5.3%	9.7%	5.1%	1.3%	2.3%
25-30 years old	10.0%	8.6%	5.9%	9.3%	5.5%
31-45 years old	30.1%	26.4%	28.3%	21.9%	22.0%
46-60 years old	30.9%	38.1%	43.3%	44.4%	49.0%
Over 60 years old	23.6%	17.1%	17.3%	23.1%	21.3%

Occupation					
Business owner or self-employed	21.8%	19.7%	26.8%	22.6%	21.3%
Upper/Middle management employee	38.5%	43.4%	38.5%	49.8%	50.1%
Auxiliary level employee	5.4%	11.8%	6.7%	2.8%	7.2%
Students	3.4%	4.4%	6.0%	3.0%	1.5%
Retired	28.4%	17.2%	21.2%	21.7%	19.7%
Unemployed / unpaid dom. work	2.4%	3.6%	0.8%	0.0%	0.3%

Annual household income level					
€12,000 - €24,000	21.4%	23.8%	17.9%	18.6%	9.5%
€24,001 - €36,000	21.0%	26.4%	17.0%	24.2%	20.4%
€36,001 - €48,000	17.4%	22.7%	25.8%	23.6%	14.3%
€48,001 - €60,000	17.2%	16.1%	18.1%	14.0%	16.0%
€60,001 - €72,000	7.4%	4.4%	3.7%	9.8%	7.5%
€72,001 - €84,000	8.2%	2.0%	8.2%	3.1%	8.3%
More than €84,000	7.4%	4.5%	9.4%	6.7%	24.2%

(*) 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: First Quarter

Which island do they choose?



Tourists (> 16 years old)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	3,804	3,995	5,237	4,606	1,788
- Fuerteventura	5,022	20,855	4,011	3,126	10,858
- Gran Canaria	10,172	8,600	8,320	8,013	12,494
- Tenerife	10,433	17,191	9,916	12,927	21,220
- La Palma	960	412	308	3,195	3,700

Share (%)	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
- Lanzarote	12.5%	7.8%	18.8%	14.5%	3.6%
- Fuerteventura	16.5%	40.8%	14.4%	9.8%	21.7%
- Gran Canaria	33.5%	16.8%	29.9%	25.1%	25.0%
- Tenerife	34.3%	33.7%	35.7%	40.6%	42.4%
- La Palma	3.2%	0.8%	1.1%	10.0%	7.4%

Who do they come with?



	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Unaccompanied	15.9%	15.9%	13.6%	11.6%	10.5%
Only with partner	55.6%	43.0%	51.7%	60.4%	63.3%
Only with children (under the age of 13)	0.0%	1.3%	1.1%	0.0%	1.2%
Partner + children (under the age of 13)	7.3%	10.4%	10.8%	9.1%	7.1%
Other relatives	5.8%	4.9%	6.7%	4.1%	2.0%
Friends	6.4%	11.1%	0.5%	2.3%	3.2%
Work colleagues	0.0%	1.2%	0.8%	0.0%	0.0%
Other combinations ⁽¹⁾	9.0%	12.1%	14.9%	12.5%	12.7%

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

How do they rate the destination?



Impression of their stay	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Good or very good (% tourists)	90.7%	97.3%	96.0%	95.0%	95.6%
Average rating (scale 1-10)	8.66	9.22	9.04	9.03	9.34

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Repeat tourists	81.0%	67.4%	81.7%	84.4%	75.7%
In love (at least 10 previous visits)	24.2%	9.5%	21.8%	18.9%	17.0%

Where does the flight come from?



Ten main origin countries	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Austria	71.3%	55.3%	64.8%	58.4%	64.5%
Germany	22.6%	37.3%	27.0%	29.0%	29.6%
Spanish Mainland	2.4%	5.3%	7.0%	8.6%	4.4%
United Kingdom	0.0%	0.0%	0.0%	0.0%	0.6%
Norway	0.0%	0.0%	0.0%	0.0%	0.5%
Czech Republic	0.0%	0.0%	0.0%	0.0%	0.3%
Switzerland	1.5%	0.5%	0.0%	3.1%	0.2%
Belgium	1.2%	1.5%	0.0%	0.0%	0.0%
Netherlands	0.0%	0.0%	0.0%	0.9%	0.0%
Ireland	0.0%	0.0%	0.2%	0.0%	0.0%

Why do they choose the Canary Islands?



Aspects influencing the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Climate/sun	96.3%	86.8%	92.7%	92.5%	90.4%
Scenery	29.7%	27.2%	37.8%	51.2%	45.2%
Tranquillity/rest/relaxation	23.9%	40.6%	38.1%	31.0%	31.4%
Beaches	24.5%	32.1%	27.7%	22.6%	24.3%
Visiting new places	10.5%	17.5%	11.5%	13.4%	14.8%
Security	10.9%	6.4%	13.0%	10.1%	13.7%
Ease of travel	14.1%	9.5%	9.4%	5.2%	9.1%
Active tourism	12.0%	11.3%	11.6%	18.7%	8.9%
Nautical activities	0.0%	2.5%	3.1%	1.6%	5.5%
Shopping	2.8%	2.6%	0.7%	2.1%	4.7%
Quality of the environment	2.5%	4.9%	7.4%	5.9%	4.6%
Culture	3.5%	2.3%	2.2%	1.0%	3.1%
Parques de ocio	2.0%	3.0%	0.0%	2.9%	3.1%
Price	6.5%	2.8%	1.6%	1.3%	2.7%
Golf	6.4%	1.0%	5.1%	1.8%	2.0%
Rural tourism	2.1%	2.7%	2.2%	0.4%	1.4%

* Multi-choice question

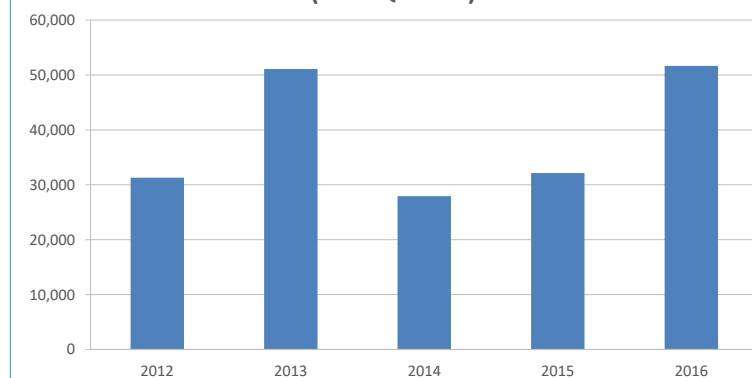
What did motivate them to come?



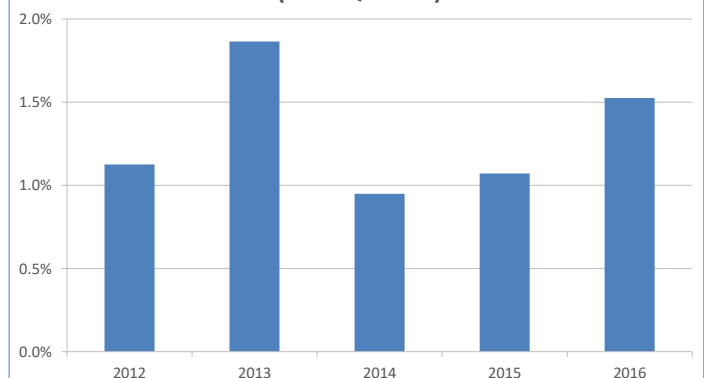
Aspects motivating the choice	2012Q1	2013Q1	2014Q1	2015Q1	2016Q1
Previous visits to the Canary Islands	72.0%	57.0%	73.5%	71.3%	63.1%
Recommendation by friends or relatives	29.5%	30.2%	38.5%	23.7%	42.3%
The Canary Islands television channel	0.0%	0.0%	0.8%	0.0%	2.0%
Other television or radio channels	1.1%	0.0%	1.0%	1.4%	2.2%
Information in the press/magazines/books	4.4%	7.1%	7.7%	4.6%	5.3%
Attendance at a tourism fair	0.0%	0.0%	0.8%	1.3%	0.0%
Tour Operator's brochure or catalogue	10.4%	13.1%	8.2%	10.3%	6.4%
Recommendation by Travel Agency	7.0%	10.6%	2.9%	11.4%	4.3%
Information obtained via the Internet	15.8%	25.2%	12.9%	16.8%	24.1%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	6.1%	3.9%	7.1%	4.0%	1.0%

* Multi-choice question

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



Share of tourists (> 16 years old)
(First 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.