

Tourist profile trend (2017)

Austria: First Quarter

How many are they and how much do they spend?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Tourist arrivals (> 16 years old)	51,094	27,928	32,138	51,656	36,993
Average daily expenditure (€)	145.44	142.36	149.04	154.33	159.36
. in their place of residence	113.68	112.12	113.86	117.77	121.81
. in the Canary Islands	31.76	30.25	35.17	36.56	37.54
Average length of stay	11.85	11.32	11.64	10.61	12.18
Turnover per tourist (€)	1,408	1,536	1,448	1,451	1,630
Total turnover (> 16 years old) (€m)	71.9	42.9	46.5	75.0	60.3
Share of total turnover	28.0%	30.6%	29.0%	31.3%	--
Share of total tourist	27.0%	28.2%	27.7%	29.2%	--

Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	36.05	22.93	39.28	59.16	83.44
- Accommodation	35.18	18.73	26.32	50.72	81.33
- Additional accommodation expenses	0.88	4.20	12.97	8.44	2.11
Transport:	35.33	26.76	30.75	32.86	39.01
- Public transport	3.95	5.33	2.96	4.31	5.91
- Taxi	5.57	3.83	4.04	2.28	5.93
- Car rental	25.82	17.60	23.75	26.27	27.17
Food and drink:	142.74	153.78	186.51	166.95	187.49
- Food purchases at supermarkets	63.81	48.66	98.17	70.35	82.58
- Restaurants	78.93	105.12	88.33	96.61	104.91
Souvenirs:	59.42	86.52	60.10	48.12	61.01
Leisure:	49.65	39.22	41.07	44.22	33.16
- Organized excursions	16.08	16.05	21.01	25.62	15.75
- Leisure, amusement	7.07	5.43	8.50	4.71	4.07
- Trip to other islands	5.03	2.94	0.74	1.92	1.47
- Sporting activities	13.37	12.47	4.76	6.84	8.52
- Cultural activities	1.28	1.64	2.12	5.09	2.60
- Discos and disco-pubs	6.81	0.68	3.94	0.03	0.73
Others:	8.45	12.67	16.24	14.81	12.51
- Wellness	3.27	7.11	2.35	4.92	1.91
- Medical expenses	1.33	1.33	0.81	0.36	2.03
- Other expenses	3.85	4.23	13.09	9.53	8.57

How far in advance do they book their trip?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
The same day they leave	0.6%	0.0%	0.3%	0.0%	0.1%
Between 2 and 7 days	6.7%	2.5%	4.6%	0.8%	3.0%
Between 8 and 15 days	9.7%	8.0%	5.7%	10.7%	5.2%
Between 16 and 30 days	16.1%	13.6%	14.5%	12.8%	16.3%
Between 31 and 90 days	39.1%	32.2%	43.8%	39.1%	34.4%
More than 90 days	27.9%	43.7%	31.2%	36.6%	40.9%

What do they book at their place of residence?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight only	3.3%	6.5%	12.0%	8.8%	8.9%
Flight and accommodation (room only)	19.1%	12.3%	18.6%	19.1%	21.5%
Flight and accommodation (B&B)	6.0%	12.4%	9.8%	10.7%	13.1%
Flight and accommodation (half board)	34.6%	38.3%	37.2%	34.9%	26.9%
Flight and accommodation (full board)	3.5%	5.1%	2.4%	3.5%	5.6%
Flight and accommodation (all inclusive)	33.6%	25.4%	20.0%	23.0%	24.0%
% Tourists using low-cost airlines	25.1%	32.5%	20.8%	30.6%	44.6%
Other expenses in their place of residence:					
- Car rental	23.3%	20.0%	28.1%	23.0%	28.2%
- Sporting activities	4.4%	9.8%	12.8%	8.1%	8.3%
- Excursions	11.2%	6.4%	16.2%	10.3%	4.5%
- Trip to other islands	5.5%	5.1%	2.3%	2.6%	2.7%

How do they book?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Accommodation booking					
Tour Operator	49.6%	47.7%	36.9%	47.6%	36.7%
- Tour Operator's website	54.0%	58.6%	57.8%	69.8%	68.9%
Accommodation	6.9%	6.8%	13.0%	10.8%	9.2%
- Accommodation's website	33.8%	85.6%	91.9%	96.5%	82.6%
Travel agency (High street)	32.0%	28.5%	31.8%	20.2%	32.5%
Online Travel Agency (OTA)	8.9%	11.7%	13.7%	16.6%	17.0%
No need to book accommodation	2.5%	5.4%	4.6%	4.8%	4.7%

	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Flight booking					
Tour Operator	46.9%	53.3%	40.2%	52.1%	43.4%
- Tour Operator's website	51.3%	60.1%	46.8%	67.9%	51.5%
Airline	6.4%	7.8%	21.2%	12.5%	17.2%
- Airline's website	70.1%	83.8%	83.9%	100.0%	97.6%
Travel agency (High street)	33.8%	29.0%	27.3%	20.6%	25.7%
Online Travel Agency (OTA)	13.0%	9.9%	11.3%	14.7%	13.8%

Where do they stay?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
5* Hotel	8.1%	11.0%	5.4%	6.1%	7.2%
4* Hotel	40.3%	48.6%	44.7%	39.8%	43.5%
1-2-3* Hotel	19.7%	11.2%	6.9%	20.0%	13.3%
Apartment	31.5%	21.6%	34.5%	28.2%	26.6%
Property (privately-owned, friends, family)	0.2%	4.5%	4.7%	3.2%	2.9%
Others	0.1%	3.0%	3.7%	2.8%	6.5%

Who are they?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Gender					
Percentage of men	47.1%	45.9%	49.4%	49.8%	52.9%
Percentage of women	52.9%	54.1%	50.6%	50.2%	47.1%

Age					
Average age (tourists > 16 years old)	46.6	48.4	50.8	50.8	52.7
Standard deviation	14.5	13.7	13.0	13.0	16.1

Age range (> 16 years old)					
16-24 years old	9.7%	5.1%	1.3%	2.3%	7.2%
25-30 years old	8.6%	5.9%	9.3%	5.5%	5.5%
31-45 years old	26.4%	28.3%	21.9%	22.0%	16.4%
46-60 years old	38.1%	43.3%	44.4%	49.0%	30.5%
Over 60 years old	17.1%	17.3%	23.1%	21.3%	40.5%

Occupation					
Business owner or self-employed	19.7%	26.8%	22.6%	21.3%	16.0%
Upper/Middle management employee	43.4%	38.5%	49.8%	50.1%	36.6%
Auxiliary level employee	11.8%	6.7%	2.8%	7.2%	6.1%
Students	4.4%	6.0%	3.0%	1.5%	3.2%
Retired	17.2%	21.2%	21.7%	19.7%	37.7%
Unemployed / unpaid dom. work	3.6%	0.8%	0.0%	0.3%	0.5%

Annual household income level					
€12,000 - €24,000	23.8%	17.9%	18.6%	9.5%	15.7%
€24,001 - €36,000	26.4%	17.0%	24.2%	20.4%	32.7%
€36,001 - €48,000	22.7%	25.8%	23.6%	14.3%	20.8%
€48,001 - €60,000	16.1%	18.1%	14.0%	16.0%	12.0%
€60,001 - €72,000	4.4%	3.7%	9.8%	7.5%	4.4%
€72,001 - €84,000	2.0%	8.2%	3.1%	8.3%	4.5%
More than €84,000	4.5%	9.4%	6.7%	24.2%	9.9%

(*) 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.

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Austria: First Quarter

Which island do they choose?



Tourists (> 16 years old)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	3,995	5,237	4,606	1,788	3,466
- Fuerteventura	20,855	4,011	3,126	10,858	2,902
- Gran Canaria	8,600	8,320	8,013	12,494	12,457
- Tenerife	17,191	9,916	12,927	21,220	15,539
- La Palma	412	308	3,195	3,700	2,159

Share (%)	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
- Lanzarote	7.8%	18.8%	14.5%	3.6%	9.5%
- Fuerteventura	40.8%	14.4%	9.8%	21.7%	7.9%
- Gran Canaria	16.8%	29.9%	25.1%	25.0%	34.1%
- Tenerife	33.7%	35.7%	40.6%	42.4%	42.5%
- La Palma	0.8%	1.1%	10.0%	7.4%	5.9%

Who do they come with?



	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Unaccompanied	15.9%	13.6%	11.6%	10.5%	10.2%
Only with partner	43.0%	51.7%	60.4%	63.3%	60.2%
Only with children (under the age of 13)	1.3%	1.1%	0.0%	1.2%	2.1%
Partner + children (under the age of 13)	10.4%	10.8%	9.1%	7.1%	5.2%
Other relatives	4.9%	6.7%	4.1%	2.0%	0.4%
Friends	11.1%	0.5%	2.3%	3.2%	7.7%
Work colleagues	1.2%	0.8%	0.0%	0.0%	1.7%
Other combinations ⁽¹⁾	12.1%	14.9%	12.5%	12.7%	12.4%

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

How do they rate the destination?



Impression of their stay	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Good or very good (% tourists)	97.3%	96.0%	95.0%	95.6%	96.9%
Average rating (scale 1-10)	9.22	9.04	9.03	9.34	9.25

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Repeat tourists	67.4%	81.7%	84.4%	75.7%	80.3%
In love (at least 10 previous visits)	9.5%	21.8%	18.9%	17.0%	22.6%

Where does the flight come from?



Ten main origin markets	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Austria	55.3%	64.8%	58.4%	64.5%	58.6%
Germany	37.3%	27.0%	29.0%	29.6%	29.7%
Spanish Mainland	5.3%	7.0%	8.6%	4.4%	9.9%
United Kingdom	0.0%	0.0%	0.0%	0.6%	1.0%
Sweden	0.0%	0.0%	0.0%	0.0%	0.5%
Belgium	1.5%	0.0%	0.0%	0.0%	0.4%
Netherlands	0.0%	0.0%	0.9%	0.0%	0.0%
Ireland	0.0%	0.2%	0.0%	0.0%	0.0%
Italy	0.0%	1.0%	0.0%	0.0%	0.0%
Norway	0.0%	0.0%	0.0%	0.5%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Climate/sun	86.8%	92.7%	92.5%	90.4%	96.0%
Scenery	27.2%	37.8%	51.2%	45.2%	42.8%
Beaches	32.1%	27.7%	22.6%	24.3%	29.4%
Tranquillity/rest/relaxation	40.6%	38.1%	31.0%	31.4%	27.0%
Visiting new places	17.5%	11.5%	13.4%	14.8%	17.6%
Security	6.4%	13.0%	10.1%	13.7%	12.7%
Active tourism	11.3%	11.6%	18.7%	8.9%	10.1%
Price	2.8%	1.6%	1.3%	2.7%	5.3%
Ease of travel	9.5%	9.4%	5.2%	9.1%	4.2%
Security against natural catastrophes	0.9%	0.8%	1.2%	0.5%	3.2%
Golf	1.0%	5.1%	1.8%	2.0%	3.1%
Theme parks	3.0%	0.0%	2.9%	3.1%	3.0%
Nightlife/fun	0.0%	0.8%	1.8%	0.0%	2.7%
Quality of the environment	4.9%	7.4%	5.9%	4.6%	2.5%
Shopping	2.6%	0.7%	2.1%	4.7%	1.8%
Nautical activities	2.5%	3.1%	1.6%	5.5%	1.8%

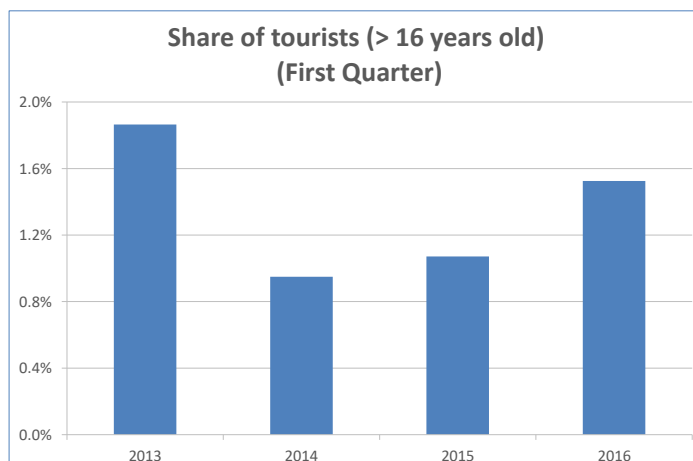
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q1	2014Q1	2015Q1	2016Q1	2017Q1
Previous visits to the Canary Islands	57.0%	73.5%	71.3%	63.1%	68.0%
Recommendation by friends or relatives	30.2%	38.5%	23.7%	42.3%	35.5%
The Canary Islands television channel	0.0%	0.8%	0.0%	2.0%	1.6%
Other television or radio channels	0.0%	1.0%	1.4%	2.2%	0.0%
Information in the press/magazines/books	7.1%	7.7%	4.6%	5.3%	2.8%
Attendance at a tourism fair	0.0%	0.8%	1.3%	0.0%	0.0%
Tour Operator's brochure or catalogue	13.1%	8.2%	10.3%	6.4%	11.8%
Recommendation by Travel Agency	10.6%	2.9%	11.4%	4.3%	5.9%
Information obtained via the Internet	25.2%	12.9%	16.8%	24.1%	25.7%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.6%
Others	3.9%	7.1%	4.0%	1.0%	6.3%

* 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.