

Tourist profile trend (2016)

Austria: Second Quarter

How many are they and how much do they spend?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Tourist arrivals (> 16 years old) | 20,405 | 27,668 | 19,955 | 25,295 | 38,196 |
| Average daily expenditure (€) | 128.03 | 135.85 | 137.51 | 166.16 | 136.67 |
| . in their place of residence | 95.39 | 101.56 | 106.09 | 115.49 | 106.57 |
| . in the Canary Islands | 32.64 | 34.30 | 31.42 | 50.68 | 30.10 |
| Average length of stay | 12.54 | 13.10 | 12.25 | 9.12 | 9.79 |
| Turnover per tourist (€) | 1,149 | 1,386 | 1,372 | 1,350 | 1,211 |
| Total turnover (> 16 years old) (€m) | 23.4 | 38.3 | 27.4 | 34.1 | 46.3 |
| Share of total turnover | 16.7% | 14.9% | 19.6% | 21.3% | 19.3% |
| Share of total tourist | 19.7% | 14.6% | 20.2% | 21.8% | 21.6% |

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

| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|-------------------------------------|--------|--------|--------|--------|--------|
| Accommodation (**): | 25.55 | 102.97 | 31.42 | 75.45 | 14.04 |
| - Accommodation | 18.97 | 100.48 | 28.51 | 69.01 | 8.93 |
| - Additional accommodation expenses | 6.58 | 2.49 | 2.91 | 6.44 | 5.11 |
| Transport: | 28.84 | 33.55 | 24.42 | 32.45 | 23.60 |
| - Public transport | 4.43 | 4.00 | 1.28 | 2.58 | 2.46 |
| - Taxi | 4.24 | 4.84 | 2.33 | 5.55 | 4.57 |
| - Car rental | 20.18 | 24.71 | 20.81 | 24.32 | 16.57 |
| Food and drink: | 141.39 | 111.40 | 145.39 | 152.95 | 118.03 |
| - Food purchases at supermarkets | 52.63 | 57.37 | 61.99 | 82.61 | 47.04 |
| - Restaurants | 88.76 | 54.03 | 83.39 | 70.34 | 70.99 |
| Souvenirs: | 78.84 | 72.43 | 62.57 | 75.67 | 64.13 |
| Leisure: | 46.49 | 31.80 | 29.79 | 65.12 | 43.78 |
| - Organized excursions | 20.67 | 12.98 | 10.89 | 33.14 | 23.37 |
| - Leisure, amusement | 4.15 | 7.77 | 1.41 | 6.09 | 10.09 |
| - Trip to other islands | 0.52 | 1.36 | 2.74 | 1.00 | 2.52 |
| - Sporting activities | 15.44 | 8.03 | 10.08 | 16.66 | 4.41 |
| - Cultural activities | 1.40 | 0.00 | 4.05 | 5.45 | 2.72 |
| - Discos and disco-pubs | 4.32 | 1.65 | 0.62 | 2.78 | 0.67 |
| Others: | 14.77 | 18.05 | 20.26 | 29.74 | 23.75 |
| - Wellness | 1.23 | 1.77 | 6.11 | 13.44 | 5.39 |
| - Medical expenses | 5.35 | 1.38 | 0.65 | 7.67 | 0.44 |
| - Other expenses | 8.19 | 14.89 | 13.50 | 8.64 | 17.92 |

How far in advance do they book their trip?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|-------------------------|--------|--------|--------|--------|--------|
| The same day they leave | 0.7% | 1.9% | 1.2% | 0.0% | 0.0% |
| Between 2 and 7 days | 7.5% | 7.9% | 4.9% | 7.2% | 4.1% |
| Between 8 and 15 days | 18.4% | 11.4% | 10.3% | 8.6% | 9.0% |
| Between 16 and 30 days | 18.9% | 17.6% | 12.7% | 9.9% | 27.0% |
| Between 31 and 90 days | 40.8% | 38.7% | 45.5% | 38.8% | 24.3% |
| More than 90 days | 13.7% | 22.5% | 25.5% | 35.6% | 35.6% |

What do they book at their place of residence?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--|--------|--------|--------|--------|--------|
| Flight only | 6.3% | 7.5% | 7.4% | 7.5% | 3.9% |
| Flight and accommodation (room only) | 14.2% | 13.3% | 15.3% | 20.2% | 11.7% |
| Flight and accommodation (B&B) | 5.0% | 6.3% | 7.0% | 15.4% | 7.3% |
| Flight and accommodation (half board) | 35.4% | 30.2% | 36.4% | 24.2% | 44.3% |
| Flight and accommodation (full board) | 0.0% | 5.9% | 3.5% | 1.0% | 0.0% |
| Flight and accommodation (all inclusive) | 39.0% | 36.8% | 30.4% | 31.7% | 32.9% |
| % Tourists using low-cost airlines | 41.0% | 32.7% | 30.1% | 19.8% | 36.3% |
| Other expenses in their place of residence: | | | | | |
| - Car rental | 16.0% | 9.3% | 16.5% | 20.3% | 20.8% |
| - Sporting activities | 7.1% | 9.8% | 7.0% | 1.6% | 17.2% |
| - Excursions | 4.9% | 5.3% | 10.2% | 6.0% | 9.1% |
| - Trip to other islands | 2.8% | 0.0% | 2.0% | 1.2% | 0.0% |

How do they book?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--------------------------------------|--------|--------|--------|--------|--------|
| Accommodation booking | | | | | |
| Tour Operator | 46.6% | 41.7% | 37.9% | 46.9% | 36.7% |
| - Tour Operator's website | 67.4% | 68.0% | 55.8% | 54.6% | 70.3% |
| Accommodation | 2.9% | 2.4% | 10.5% | 7.7% | 5.6% |
| - Accommodation's website | 0.0% | 81.7% | 89.7% | 100.0% | 83.3% |
| Travel agency (High street) | 24.5% | 27.5% | 33.2% | 27.4% | 38.5% |
| Online Travel Agency (OTA) | 21.4% | 22.6% | 13.1% | 16.1% | 17.2% |
| No need to book accommodation | 4.5% | 5.8% | 5.4% | 1.8% | 2.0% |

Flight booking

| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|------------------------------------|--------|--------|--------|--------|--------|
| Tour Operator | 48.1% | 38.1% | 45.5% | 46.3% | 49.3% |
| - Tour Operator's website | 58.8% | 51.9% | 61.6% | 50.2% | 47.0% |
| Airline | 4.7% | 16.2% | 11.1% | 11.5% | 5.1% |
| - Airline's website | 100.0% | 63.4% | 69.7% | 72.0% | 100.0% |
| Travel agency (High street) | 26.3% | 28.2% | 30.7% | 27.7% | 30.8% |
| Online Travel Agency (OTA) | 20.9% | 17.5% | 12.6% | 14.6% | 14.9% |

Where do they stay?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|---|--------|--------|--------|--------|--------|
| 5* Hotel | 5.9% | 6.8% | 8.3% | 6.7% | 7.7% |
| 4* Hotel | 43.6% | 46.7% | 46.5% | 48.5% | 51.5% |
| 1-2-3* Hotel | 18.8% | 21.3% | 12.3% | 12.8% | 10.8% |
| Apartment | 28.7% | 17.3% | 23.1% | 27.7% | 25.1% |
| Property (privately-owned, friends, family) | 3.1% | 4.1% | 5.9% | 1.2% | 2.9% |
| Others | 0.0% | 3.9% | 3.8% | 3.1% | 2.0% |

Who are they?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|---------------------|--------|--------|--------|--------|--------|
| Gender | | | | | |
| Percentage of men | 42.9% | 44.8% | 48.8% | 51.6% | 37.0% |
| Percentage of women | 57.1% | 55.2% | 51.2% | 48.4% | 63.0% |

Age

| | | | | | |
|---------------------------------------|------|------|------|------|------|
| Average age (tourists > 16 years old) | 44.8 | 42.7 | 47.7 | 45.1 | 45.3 |
| Standard deviation | 15.2 | 15.6 | 14.4 | 15.2 | 17.2 |

Age range (> 16 years old)

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| 16-24 years old | 10.7% | 10.1% | 6.9% | 14.6% | 13.7% |
| 25-30 years old | 17.0% | 23.9% | 10.6% | 5.3% | 14.8% |
| 31-45 years old | 18.4% | 22.4% | 21.9% | 29.9% | 17.9% |
| 46-60 years old | 40.5% | 26.1% | 44.0% | 37.2% | 30.0% |
| Over 60 years old | 13.3% | 17.5% | 16.6% | 13.0% | 23.6% |

Occupation

| | | | | | |
|----------------------------------|-------|-------|-------|-------|-------|
| Business owner or self-employed | 17.2% | 14.7% | 12.5% | 19.9% | 13.5% |
| Upper/Middle management employee | 52.1% | 42.6% | 53.4% | 40.7% | 47.2% |
| Auxiliary level employee | 14.1% | 14.5% | 8.7% | 20.8% | 8.2% |
| Students | 1.7% | 5.5% | 5.4% | 4.2% | 3.4% |
| Retired | 14.9% | 17.0% | 18.4% | 12.3% | 25.4% |
| Unemployed / unpaid dom. work | 0.0% | 5.7% | 1.6% | 2.1% | 2.1% |

Annual household income level

| | | | | | |
|-------------------|-------|-------|-------|-------|-------|
| €12,000 - €24,000 | 21.4% | 33.2% | 24.0% | 28.0% | 28.4% |
| €24,001 - €36,000 | 29.9% | 19.8% | 28.8% | 25.7% | 28.9% |
| €36,001 - €48,000 | 18.6% | 11.3% | 23.1% | 17.0% | 11.2% |
| €48,001 - €60,000 | 13.7% | 14.0% | 7.3% | 10.5% | 16.4% |
| €60,001 - €72,000 | 5.1% | 8.8% | 1.5% | 6.2% | 5.5% |
| €72,001 - €84,000 | 0.0% | 0.0% | 5.5% | 2.4% | 5.5% |
| More than €84,000 | 11.3% | 12.8% | 9.8% | 10.3% | 4.0% |

(*) 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: Second Quarter

Which island do they choose?



| Tourists (> 16 years old) | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|---------------------------|--------|--------|--------|--------|--------|
| - Lanzarote | 2,784 | 1,572 | 3,577 | 3,082 | 2,460 |
| - Fuerteventura | 2,308 | 5,750 | 2,119 | 2,589 | 9,033 |
| - Gran Canaria | 6,838 | 5,121 | 4,960 | 7,877 | 8,975 |
| - Tenerife | 7,514 | 13,261 | 7,007 | 7,850 | 15,245 |
| - La Palma | 784 | 1,488 | 1,950 | 3,393 | 1,538 |

| Share (%) | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|-----------------|--------|--------|--------|--------|--------|
| - Lanzarote | 13.8% | 5.8% | 18.2% | 12.4% | 6.6% |
| - Fuerteventura | 11.4% | 21.1% | 10.8% | 10.4% | 24.2% |
| - Gran Canaria | 33.8% | 18.8% | 25.3% | 31.8% | 24.1% |
| - Tenerife | 37.1% | 48.8% | 35.7% | 31.7% | 40.9% |
| - La Palma | 3.9% | 5.5% | 9.9% | 13.7% | 4.1% |

Who do they come with?



| | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--|--------|--------|--------|--------|--------|
| Unaccompanied | 9.8% | 15.0% | 9.1% | 10.4% | 10.6% |
| Only with partner | 54.5% | 50.2% | 54.8% | 46.6% | 64.4% |
| Only with children (under the age of 13) | 0.7% | 0.8% | 0.0% | 1.5% | 0.9% |
| Partner + children (under the age of 13) | 2.2% | 4.1% | 1.2% | 9.7% | 4.0% |
| Other relatives | 6.1% | 7.1% | 12.1% | 2.7% | 6.6% |
| Friends | 9.1% | 13.9% | 4.9% | 11.9% | 9.1% |
| Work colleagues | 0.0% | 0.0% | 1.0% | 0.0% | 0.0% |
| Other combinations ⁽¹⁾ | 17.5% | 8.9% | 16.8% | 17.3% | 4.4% |

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

How do they rate the destination?



| Impression of their stay | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--------------------------------|--------|--------|--------|--------|--------|
| Good or very good (% tourists) | 94.7% | 93.3% | 93.3% | 97.2% | 99.1% |
| Average rating (scale 1-10) | 9.07 | 9.05 | 9.01 | 9.43 | 9.23 |

How many are loyal to the destination?

| Repeat tourists of the Canary Islands | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|---------------------------------------|--------|--------|--------|--------|--------|
| Repeat tourists | 55.3% | 68.8% | 72.0% | 61.8% | 61.4% |
| In love (at least 10 previous visits) | 10.6% | 8.7% | 16.6% | 9.1% | 15.0% |

Where does the flight come from?



| Ten main origin countries | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|---------------------------|--------|--------|--------|--------|--------|
| Austria | 68.8% | 74.1% | 65.1% | 47.5% | 50.9% |
| Germany | 21.1% | 13.2% | 21.2% | 33.7% | 36.8% |
| Spanish Mainland | 2.2% | 9.5% | 10.0% | 14.7% | 9.7% |
| Belgium | 0.0% | 0.0% | 0.0% | 0.0% | 1.4% |
| Switzerland | 6.5% | 3.2% | 2.9% | 3.1% | 1.1% |
| Italy | 1.4% | 0.0% | 0.0% | 1.1% | 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% |
| Ireland | 0.0% | 0.0% | 0.0% | 0.0% | 0.0% |

Why do they choose the Canary Islands?



| Aspects influencing the choice | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|-----------------------------------|--------|--------|--------|--------|--------|
| Climate/sun | 93.8% | 90.0% | 86.9% | 90.7% | 88.9% |
| Beaches | 36.0% | 36.6% | 45.5% | 32.9% | 39.1% |
| Tranquillity/rest/relaxation | 33.3% | 35.2% | 29.2% | 31.0% | 38.2% |
| Scenery | 32.4% | 37.7% | 43.7% | 46.6% | 35.9% |
| Security | 11.8% | 11.5% | 6.1% | 7.8% | 22.8% |
| Visiting new places | 22.3% | 20.3% | 13.0% | 13.6% | 17.6% |
| Active tourism | 9.1% | 10.0% | 13.6% | 14.3% | 13.3% |
| Ease of travel | 2.1% | 8.3% | 5.8% | 6.2% | 8.3% |
| Price | 7.2% | 7.5% | 3.6% | 4.8% | 5.3% |
| Nautical activities | 4.8% | 3.1% | 3.6% | 3.1% | 5.1% |
| Quality of the environment | 5.3% | 2.2% | 3.6% | 7.4% | 4.7% |
| Suitable destination for children | 2.7% | 1.4% | 2.7% | 5.6% | 4.1% |
| Shopping | 2.7% | 2.4% | 2.3% | 3.0% | 2.4% |
| Culture | 5.3% | 1.8% | 3.8% | 2.6% | 1.9% |
| Theme parks | 3.8% | 5.5% | 3.4% | 4.6% | 0.9% |
| Golf | 0.6% | 1.8% | 1.0% | 0.0% | 0.7% |

* Multi-choice question

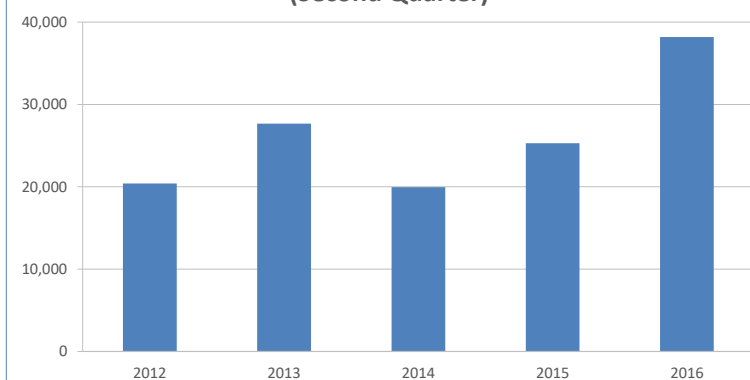
What did motivate them to come?



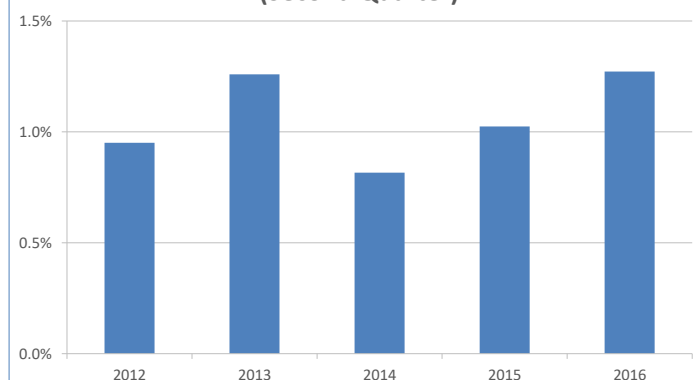
| Aspects motivating the choice | 2012Q2 | 2013Q2 | 2014Q2 | 2015Q2 | 2016Q2 |
|--|--------|--------|--------|--------|--------|
| Previous visits to the Canary Islands | 48.3% | 52.0% | 60.8% | 53.1% | 48.3% |
| Recommendation by friends or relatives | 30.9% | 39.0% | 23.5% | 35.9% | 37.4% |
| The Canary Islands television channel | 1.8% | 1.4% | 2.0% | 0.0% | 0.8% |
| Other television or radio channels | 1.4% | 2.5% | 0.0% | 0.0% | 2.7% |
| Information in the press/magazines/books | 5.5% | 2.9% | 5.1% | 3.4% | 5.1% |
| Attendance at a tourism fair | 1.4% | 1.9% | 0.0% | 0.7% | 0.0% |
| Tour Operator's brochure or catalogue | 13.7% | 7.4% | 13.8% | 12.9% | 10.8% |
| Recommendation by Travel Agency | 14.6% | 7.9% | 17.0% | 11.6% | 13.5% |
| Information obtained via the Internet | 30.5% | 35.8% | 19.5% | 33.8% | 31.4% |
| Senior Tourism programme | 1.4% | 0.0% | 0.0% | 0.0% | 0.0% |
| Others | 5.8% | 7.3% | 11.1% | 4.2% | 4.0% |

* Multi-choice question

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



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