

Tourist profile trend (2017)

Austria: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	61,261	25,633	28,390	39,730	24,337
Average daily expenditure (€)	146.41	151.93	145.99	155.36	153.65
. in their place of residence	114.83	120.95	112.48	119.12	114.58
. in the Canary Islands	31.58	30.97	33.51	36.24	39.07
Average length of stay	10.21	8.99	9.54	9.72	9.78
Turnover per tourist (€)	1,340	1,307	1,276	1,333	1,453
Total turnover (> 16 years old) (€m)	82.1	33.5	36.2	53.0	35.4
Share of total turnover	32.0%	23.9%	22.6%	22.1%	--
Share of total tourist	32.4%	25.9%	24.5%	22.5%	--

Expenditure in the Canary Islands per tourist and trip (€) (*)					
Accommodation (**):	45.77	24.71	44.29	54.31	50.29
- Accommodation	32.01	17.29	33.12	41.10	41.79
- Additional accommodation expenses	13.76	7.42	11.17	13.21	8.50
Transport:	29.23	30.66	30.23	26.43	27.46
- Public transport	4.79	11.49	2.03	1.74	0.98
- Taxi	6.68	2.57	5.06	1.15	3.29
- Car rental	17.76	16.59	23.14	23.55	23.18
Food and drink:	107.05	103.63	109.55	104.59	164.46
- Food purchases at supermarkets	51.34	53.01	47.99	43.35	39.55
- Restaurants	55.71	50.62	61.56	61.25	124.91
Souvenirs:	59.53	63.04	60.08	51.51	81.33
Leisure:	67.31	53.25	41.67	62.47	60.91
- Organized excursions	35.71	30.53	19.46	30.25	32.90
- Leisure, amusement	11.04	10.45	9.91	6.08	11.55
- Trip to other islands	6.69	0.70	2.12	1.50	2.74
- Sporting activities	7.28	2.41	1.94	16.22	4.88
- Cultural activities	4.92	1.31	2.53	3.98	2.76
- Discos and disco-pubs	1.66	7.84	5.69	4.44	6.07
Others:	200.33	3.09	9.23	13.34	9.46
- Wellness	3.35	1.01	2.91	2.69	0.19
- Medical expenses	3.66	0.00	0.46	2.42	1.80
- Other expenses	193.33	2.08	5.86	8.23	7.46

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.5%	0.0%	2.0%	0.0%	0.0%
Between 2 and 7 days	10.1%	6.1%	3.4%	3.5%	2.9%
Between 8 and 15 days	9.7%	13.1%	7.7%	6.5%	6.1%
Between 16 and 30 days	14.4%	8.9%	7.9%	7.8%	10.8%
Between 31 and 90 days	22.7%	21.5%	26.9%	29.9%	23.3%
More than 90 days	42.6%	50.3%	52.0%	52.3%	56.8%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	4.6%	2.1%	4.2%	6.5%	8.3%
Flight and accommodation (room only)	11.1%	11.9%	15.6%	6.8%	15.1%
Flight and accommodation (B&B)	2.4%	7.2%	9.7%	8.4%	8.7%
Flight and accommodation (half board)	35.0%	28.5%	25.4%	38.1%	36.3%
Flight and accommodation (full board)	1.9%	3.9%	1.7%	4.0%	0.0%
Flight and accommodation (all inclusive)	45.0%	46.5%	43.4%	36.3%	31.6%
% Tourists using low-cost airlines	28.3%	29.9%	30.1%	27.7%	24.0%
Other expenses in their place of residence:					
- Car rental	10.6%	15.8%	17.7%	12.6%	12.2%
- Sporting activities	10.5%	7.6%	10.2%	7.9%	5.1%
- Excursions	13.3%	13.6%	13.1%	15.1%	20.6%
- Trip to other islands	3.1%	2.4%	0.0%	0.8%	1.4%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	47.9%	45.7%	38.3%	37.1%	45.1%
- Tour Operator's website	60.1%	59.9%	70.7%	54.4%	52.1%
Accommodation	3.3%	8.2%	5.7%	6.1%	8.2%
- Accommodation's website	82.2%	100.0%	100.0%	65.9%	62.1%
Travel agency (High street)	33.2%	29.0%	38.3%	35.2%	29.5%
Online Travel Agency (OTA)	13.8%	15.0%	15.8%	17.8%	12.1%
No need to book accommodation	1.7%	2.1%	1.9%	3.9%	5.1%

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight booking					
Tour Operator	47.8%	47.0%	37.4%	47.9%	45.3%
- Tour Operator's website	53.2%	58.6%	70.5%	53.4%	40.2%
Airline	5.0%	7.0%	8.5%	8.3%	16.0%
- Airline's website	92.3%	68.7%	100.0%	100.0%	100.0%
Travel agency (High street)	36.2%	32.3%	39.3%	30.2%	24.5%
Online Travel Agency (OTA)	11.0%	13.7%	14.7%	13.6%	14.3%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	3.3%	12.4%	7.5%	7.7%	8.5%
4* Hotel	63.5%	58.0%	49.6%	51.5%	48.6%
1-2-3* Hotel	14.3%	10.2%	10.2%	13.0%	8.2%
Apartment	15.0%	17.4%	27.8%	23.5%	24.9%
Property (privately-owned, friends, family)	2.6%	2.0%	1.9%	4.1%	5.4%
Others	1.3%	0.0%	3.0%	0.2%	4.4%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	42.2%	42.8%	43.4%	50.0%	42.7%
Percentage of women	57.8%	57.2%	56.6%	50.0%	57.3%

Age					
Average age (tourists > 16 years old)	35.8	35.8	36.2	38.3	39.1
Standard deviation	11.3	12.3	12.2	14.9	16.0

Age range (> 16 years old)					
16-24 years old	18.2%	25.5%	19.9%	20.8%	22.7%
25-30 years old	24.1%	14.5%	23.0%	19.1%	22.9%
31-45 years old	32.4%	38.7%	29.2%	27.2%	17.4%
46-60 years old	25.3%	18.5%	26.5%	28.7%	25.9%
Over 60 years old	0.0%	2.8%	1.3%	4.3%	11.1%

Occupation					
Business owner or self-employed	14.2%	4.7%	13.7%	8.1%	17.1%
Upper/Middle management employee	55.7%	55.7%	56.9%	51.3%	51.8%
Auxiliary level employee	20.4%	17.1%	13.1%	21.3%	12.8%
Students	8.9%	14.1%	12.1%	15.4%	10.2%
Retired	0.8%	6.1%	1.8%	2.7%	1.2%
Unemployed / unpaid dom. work	0.0%	2.2%	2.4%	1.1%	6.9%

Annual household income level					
€12,000 - €24,000	22.9%	36.7%	29.7%	29.1%	21.9%
€24,001 - €36,000	26.2%	17.9%	21.4%	15.6%	29.1%
€36,001 - €48,000	14.9%	18.9%	21.2%	16.1%	20.2%
€48,001 - €60,000	5.9%	7.5%	8.4%	14.5%	14.3%
€60,001 - €72,000	5.1%	9.0%	3.5%	12.5%	3.6%
€72,001 - €84,000	7.7%	4.3%	5.8%	2.6%	3.4%
More than €84,000	17.2%	5.6%	10.0%	9.5%	7.5%

(*) 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.

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Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	8,706	2,406	3,339	7,772	1,370
- Fuerteventura	20,217	4,656	5,086	6,229	1,917
- Gran Canaria	9,132	7,055	8,452	7,592	8,717
- Tenerife	22,130	9,437	9,411	15,531	10,915
- La Palma	692	1,751	1,764	2,139	1,418

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	14.3%	9.5%	11.9%	19.8%	5.6%
- Fuerteventura	33.2%	18.4%	18.1%	15.9%	7.9%
- Gran Canaria	15.0%	27.9%	30.1%	19.3%	35.8%
- Tenerife	36.4%	37.3%	33.5%	39.6%	44.8%
- La Palma	1.1%	6.9%	6.3%	5.4%	5.8%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	3.8%	6.4%	3.2%	4.2%	2.3%
Only with partner	43.5%	49.4%	53.0%	40.2%	42.3%
Only with children (under the age of 13)	3.4%	3.9%	0.6%	1.1%	3.5%
Partner + children (under the age of 13)	9.7%	10.7%	13.7%	15.3%	6.7%
Other relatives	2.3%	6.9%	6.7%	7.4%	2.0%
Friends	6.6%	6.5%	6.1%	6.3%	15.1%
Work colleagues	0.0%	0.0%	0.0%	0.0%	1.4%
Other combinations ⁽¹⁾	30.6%	16.3%	16.6%	25.5%	26.7%

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

How do they rate the destination?



Impression of their stay	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Good or very good (% tourists)	93.3%	88.0%	95.7%	94.1%	91.8%
Average rating (scale 1-10)	8.98	8.91	9.00	9.16	8.87

How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	56.4%	49.6%	51.7%	54.3%	56.2%
In love (at least 10 previous visits)	4.4%	5.6%	6.8%	8.6%	13.5%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Austria	71.1%	66.8%	55.8%	63.4%	49.2%
Germany	19.2%	19.4%	29.9%	20.4%	34.3%
Spanish Mainland	5.4%	12.7%	11.1%	12.3%	9.1%
Switzerland	4.1%	1.1%	2.2%	3.9%	6.2%
Belgium	0.2%	0.0%	0.0%	0.0%	1.3%
Russia	0.0%	0.0%	1.1%	0.0%	0.0%
United Kingdom	0.0%	0.0%	0.0%	0.0%	0.0%
France	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	0.0%	0.0%	0.0%	0.0%	0.0%
Poland	0.0%	0.0%	0.0%	0.0%	0.0%



Why do they choose the Canary Islands?



Aspects influencing the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Climate/sun	86.5%	81.5%	81.9%	80.5%	87.4%
Beaches	53.6%	46.0%	61.0%	45.9%	51.7%
Tranquillity/rest/relaxation	31.7%	49.9%	36.0%	36.9%	36.3%
Scenery	29.3%	27.0%	28.6%	33.7%	24.6%
Visiting new places	22.6%	26.9%	14.3%	24.5%	19.7%
Security	2.1%	1.7%	8.5%	22.0%	16.6%
Price	3.7%	2.5%	4.9%	7.3%	9.2%
Theme parks	11.0%	15.0%	7.0%	6.1%	5.8%
Culture	3.1%	4.3%	3.5%	3.8%	5.4%
Active tourism	7.2%	8.7%	7.0%	7.2%	4.6%
Nautical activities	14.5%	4.5%	5.8%	5.8%	4.6%
Quality of the environment	3.3%	3.4%	2.0%	4.3%	4.1%
Ease of travel	0.0%	1.3%	4.4%	4.3%	4.0%
Suitable destination for children	6.6%	4.1%	3.6%	3.3%	3.9%
Rural tourism	2.4%	0.7%	0.6%	1.1%	2.9%
Shopping	2.2%	1.7%	4.2%	0.0%	1.9%

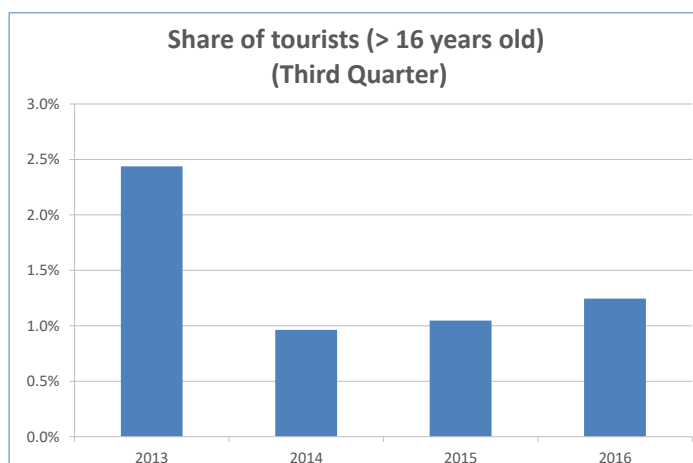
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	45.5%	34.3%	41.7%	36.0%	52.2%
Recommendation by friends or relatives	36.7%	34.1%	39.3%	27.9%	39.2%
The Canary Islands television channel	0.0%	0.0%	3.5%	0.0%	0.0%
Other television or radio channels	3.3%	5.7%	2.3%	4.7%	0.0%
Information in the press/magazines/books	7.7%	6.3%	2.2%	3.9%	1.6%
Attendance at a tourism fair	0.0%	1.2%	0.9%	0.0%	0.0%
Tour Operator's brochure or catalogue	15.5%	16.9%	17.8%	20.4%	17.8%
Recommendation by Travel Agency	18.0%	13.7%	12.5%	18.3%	14.5%
Information obtained via the Internet	23.1%	34.3%	37.2%	38.0%	28.3%
Senior Tourism programme	0.0%	0.0%	0.0%	0.0%	0.0%
Others	5.8%	5.0%	5.2%	6.9%	3.1%

* 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.