

Tourist profile trend (2017)

Switzerland: Third Quarter

How many are they and how much do they spend?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tourist arrivals (> 16 years old)	55,911	55,235	52,483	64,929	74,020
Average daily expenditure (€)	153.77	165.80	169.26	162.00	180.55
. in their place of residence	111.84	119.51	123.94	119.31	132.01
. in the Canary Islands	41.92	46.29	45.32	42.70	48.54
Average length of stay	9.05	8.59	8.95	9.61	8.71
Turnover per tourist (€)	1,307	1,330	1,413	1,437	1,440
Total turnover (> 16 years old) (€m)	73.1	73.5	74.2	93.3	106.6
Share of total turnover	26.1%	23.5%	21.2%	24.1%	--
Share of total tourist	27.6%	25.4%	22.8%	25.3%	--

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

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation (**):	48.86	61.17	64.40	63.66	65.60
- Accommodation	38.77	53.64	56.79	55.71	51.48
- Additional accommodation expenses	10.09	7.53	7.62	7.95	14.12
Transport:	23.67	23.05	27.36	32.53	24.48
- Public transport	3.99	3.69	4.80	3.57	1.82
- Taxi	6.61	6.50	6.72	9.31	6.45
- Car rental	13.08	12.87	15.84	19.65	16.21
Food and drink:	133.59	161.57	144.50	128.85	159.76
- Food purchases at supermarkets	44.38	66.90	65.49	40.88	63.81
- Restaurants	89.20	94.67	79.01	87.97	95.96
Souvenirs:	79.52	62.99	68.91	70.59	64.96
Leisure:	58.92	48.78	55.22	57.66	49.75
- Organized excursions	26.87	18.54	29.93	21.41	21.32
- Leisure, amusement	6.57	6.02	10.55	7.09	6.88
- Trip to other islands	1.93	0.77	1.51	2.74	0.00
- Sporting activities	15.64	7.75	6.03	11.92	11.70
- Cultural activities	1.72	1.96	0.91	2.94	0.41
- Discos and disco-pubs	6.18	13.75	6.29	11.55	9.44
Others:	19.49	23.01	17.35	28.79	18.14
- Wellness	1.55	5.57	7.83	8.20	7.88
- Medical expenses	2.07	1.87	1.07	0.60	1.78
- Other expenses	15.87	15.57	8.46	19.99	8.48

How far in advance do they book their trip?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
The same day they leave	0.5%	0.0%	0.0%	0.0%	0.8%
Between 2 and 7 days	8.7%	13.6%	1.6%	7.4%	8.7%
Between 8 and 15 days	16.1%	11.2%	9.1%	6.7%	13.8%
Between 16 and 30 days	14.8%	11.7%	18.2%	9.4%	14.3%
Between 31 and 90 days	26.6%	26.4%	34.1%	30.2%	23.3%
More than 90 days	33.2%	37.1%	37.0%	46.3%	39.1%

What do they book at their place of residence?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Flight only	7.2%	6.0%	6.3%	5.7%	7.9%
Flight and accommodation (room only)	10.9%	15.9%	14.1%	14.0%	16.1%
Flight and accommodation (B&B)	13.3%	14.9%	12.4%	17.2%	24.4%
Flight and accommodation (half board)	38.4%	39.7%	23.3%	26.1%	24.4%
Flight and accommodation (full board)	3.9%	2.6%	2.9%	5.0%	4.7%
Flight and accommodation (all inclusive)	26.3%	20.8%	41.1%	32.0%	22.5%
% Tourists using low-cost airlines	27.5%	21.6%	27.7%	35.9%	39.9%
Other expenses in their place of residence:					
- Car rental	10.6%	11.3%	11.5%	11.5%	16.2%
- Sporting activities	6.7%	8.2%	7.6%	8.4%	12.7%
- Excursions	5.6%	9.7%	6.6%	10.2%	8.7%
- Trip to other islands	1.7%	0.7%	0.0%	1.8%	0.0%

How do they book?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Accommodation booking					
Tour Operator	36.3%	40.8%	46.0%	40.2%	37.2%
- Tour Operator's website	56.5%	78.2%	82.6%	77.8%	89.7%
Accommodation	8.3%	5.1%	9.1%	11.9%	11.0%
- Accommodation's website	75.1%	100.0%	68.2%	100.0%	86.1%
Travel agency (High street)	26.4%	29.0%	16.3%	23.5%	24.2%
Online Travel Agency (OTA)	24.3%	19.6%	24.9%	20.5%	24.3%
No need to book accommodation	4.7%	5.4%	3.7%	3.9%	3.3%

Flight booking

	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Tour Operator	40.0%	43.2%	49.5%	38.3%	32.1%
- Tour Operator's website	64.4%	78.9%	82.1%	77.6%	76.6%
Airline	12.9%	10.5%	12.1%	19.9%	18.4%
- Airline's website	96.0%	91.3%	90.9%	92.4%	90.0%
Travel agency (High street)	24.2%	25.0%	14.6%	22.4%	22.0%
Online Travel Agency (OTA)	23.0%	21.3%	23.8%	19.3%	27.4%

Where do they stay?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
5* Hotel	12.4%	18.5%	14.8%	13.0%	24.8%
4* Hotel	44.2%	44.4%	46.2%	52.5%	40.5%
1-2-3* Hotel	22.0%	11.2%	16.4%	13.0%	13.2%
Apartment	17.8%	21.8%	18.2%	15.6%	16.1%
Property (privately-owned, friends, family)	3.1%	4.0%	4.2%	3.3%	4.3%
Others	0.5%	0.1%	0.3%	2.5%	1.1%

Who are they?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Gender					
Percentage of men	49.0%	48.7%	57.2%	52.2%	56.0%
Percentage of women	51.0%	51.3%	42.8%	47.8%	44.0%

Age

Average age (tourists > 16 years old)	36.4	35.6	34.6	38.8	34.1
Standard deviation	13.7	12.8	13.4	15.0	14.6

Age range (> 16 years old)

16-24 years old	25.1%	23.6%	33.5%	22.2%	33.9%
25-30 years old	17.9%	24.8%	15.2%	17.9%	21.4%
31-45 years old	26.7%	23.5%	26.1%	24.5%	24.5%
46-60 years old	25.2%	24.4%	21.9%	27.5%	14.6%
Over 60 years old	5.1%	3.8%	3.4%	8.0%	5.6%

Occupation

Business owner or self-employed	13.4%	10.3%	15.7%	7.7%	11.7%
Upper/Middle management employee	58.1%	61.9%	47.8%	58.7%	50.7%
Auxiliary level employee	7.7%	13.1%	15.7%	14.0%	11.9%
Students	15.4%	11.6%	15.2%	11.6%	15.8%
Retired	4.5%	2.3%	2.7%	4.4%	6.0%
Unemployed / unpaid dom. work	0.8%	0.9%	2.8%	3.6%	3.9%

Annual household income level

€12,000 - €24,000	10.0%	7.0%	12.4%	7.9%	12.7%
€24,001 - €36,000	7.4%	7.6%	5.3%	3.4%	4.2%
€36,001 - €48,000	9.4%	13.8%	6.7%	7.5%	8.8%
€48,001 - €60,000	21.5%	22.1%	16.9%	17.0%	10.7%
€60,001 - €72,000	9.6%	11.6%	15.3%	14.8%	14.4%
€72,001 - €84,000	6.2%	6.5%	3.7%	9.9%	9.0%
More than €84,000	35.9%	31.4%	39.7%	39.5%	40.1%

(*) 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 (2017)

Switzerland: Third Quarter

Which island do they choose?



Tourists (> 16 years old)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	5,727	6,505	6,973	7,743	8,856
- Fuerteventura	12,588	7,393	7,284	10,572	13,931
- Gran Canaria	18,266	21,002	20,981	26,376	27,602
- Tenerife	18,091	18,899	16,062	19,321	21,632
- La Palma	458	622	688	128	1,998

Share (%)	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
- Lanzarote	10.4%	12.0%	13.4%	12.1%	12.0%
- Fuerteventura	22.8%	13.6%	14.0%	16.5%	18.8%
- Gran Canaria	33.1%	38.6%	40.4%	41.1%	37.3%
- Tenerife	32.8%	34.7%	30.9%	30.1%	29.2%
- La Palma	0.8%	1.1%	1.3%	0.2%	2.7%

Who do they come with?



	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Unaccompanied	7.8%	8.3%	10.4%	11.3%	10.4%
Only with partner	50.0%	53.8%	53.5%	40.7%	43.8%
Only with children (under the age of 13)	1.4%	1.4%	0.6%	3.6%	1.9%
Partner + children (under the age of 13)	9.6%	5.4%	8.5%	11.3%	3.3%
Other relatives	4.4%	1.4%	3.8%	6.7%	6.7%
Friends	13.4%	8.6%	10.4%	9.2%	19.7%
Work colleagues	0.0%	0.0%	0.7%	0.0%	0.2%
Other combinations ⁽¹⁾	13.3%	21.1%	12.0%	17.2%	14.0%

* 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)	93.0%	94.5%	94.9%	93.6%	89.4%
Average rating (scale 1-10)	8.51	8.76	8.81	8.86	8.55

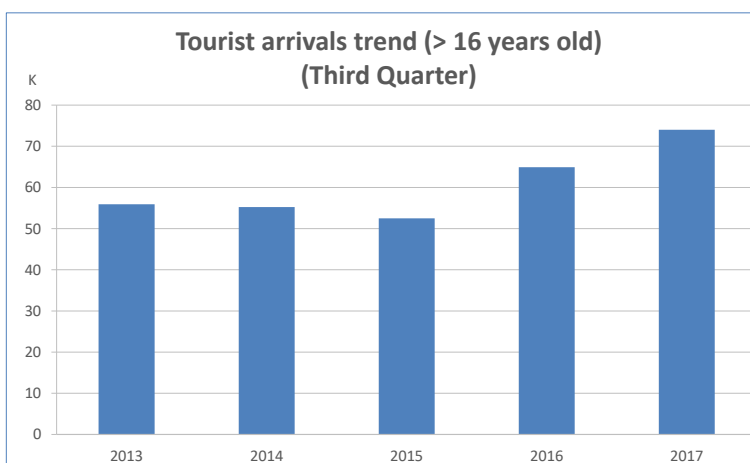
How many are loyal to the destination?

Repeat tourists of the Canary Islands	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Repeat tourists	52.6%	56.9%	59.8%	63.9%	56.1%
In love (at least 10 previous visits)	5.7%	8.1%	4.3%	12.2%	6.3%

Where does the flight come from?



Ten main origin markets	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Switzerland	82.9%	78.4%	79.7%	73.0%	75.2%
Spanish Mainland	7.5%	15.9%	15.5%	19.3%	17.4%
Germany	7.1%	1.5%	2.3%	4.8%	6.9%
Italy	1.2%	1.7%	0.5%	1.5%	0.5%
Austria	0.4%	0.0%	0.0%	0.0%	0.0%
Belgium	0.0%	0.0%	0.6%	0.0%	0.0%
France	0.0%	0.0%	0.5%	1.3%	0.0%
United Kingdom	0.8%	0.0%	0.5%	0.0%	0.0%
Sweden	0.0%	0.7%	0.0%	0.0%	0.0%
Denmark	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	89.8%	91.9%	85.3%	89.3%	83.7%
Beaches	58.6%	45.8%	52.9%	54.6%	51.9%
Tranquillity/rest/relaxation	37.0%	30.2%	40.1%	35.4%	38.0%
Visiting new places	17.5%	25.7%	22.5%	24.6%	26.3%
Scenery	18.7%	26.5%	20.4%	19.1%	20.9%
Security	2.3%	6.0%	12.1%	13.7%	12.4%
Price	20.4%	15.6%	17.5%	11.5%	10.4%
Nautical activities	5.6%	5.0%	5.1%	3.9%	7.9%
Rural tourism	1.7%	0.6%	1.2%	0.6%	5.8%
Ease of travel	3.2%	5.1%	5.6%	5.2%	4.5%
Active tourism	3.4%	6.3%	4.1%	4.5%	4.1%
Suitable destination for children	2.1%	5.1%	1.9%	3.4%	3.5%
Quality of the environment	2.9%	0.1%	2.3%	3.4%	3.4%
Shopping	1.9%	1.4%	3.0%	0.2%	1.6%
Nightlife/fun	5.5%	5.8%	8.1%	5.1%	1.3%
Culture	1.2%	1.3%	0.2%	2.8%	1.0%

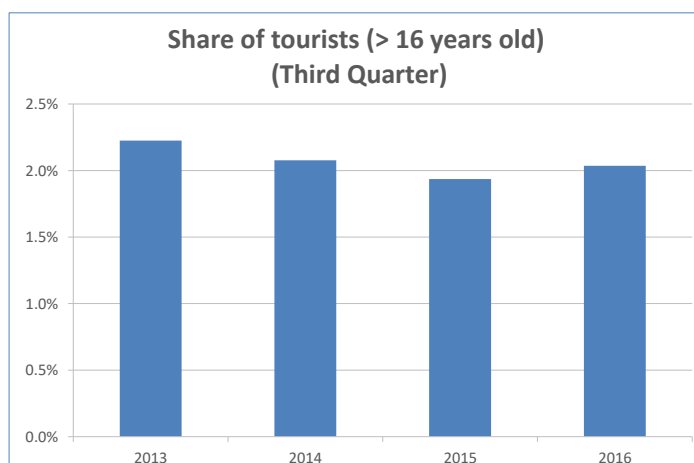
* Multi-choice question

What did motivate them to come?



Aspects motivating the choice	2013Q3	2014Q3	2015Q3	2016Q3	2017Q3
Previous visits to the Canary Islands	42.9%	43.3%	43.7%	45.1%	45.7%
Recommendation by friends or relatives	31.4%	33.3%	35.9%	37.4%	33.9%
The Canary Islands television channel	0.0%	0.6%	0.0%	0.9%	0.0%
Other television or radio channels	1.0%	0.0%	0.6%	0.0%	0.0%
Information in the press/magazines/books	3.2%	3.6%	3.7%	3.6%	3.9%
Attendance at a tourism fair	1.5%	0.8%	0.0%	0.0%	0.8%
Tour Operator's brochure or catalogue	17.5%	15.8%	9.2%	14.8%	6.4%
Recommendation by Travel Agency	21.7%	21.0%	18.1%	16.9%	20.5%
Information obtained via the Internet	37.4%	35.1%	43.2%	41.3%	47.0%
Senior Tourism programme	0.0%	0.0%	0.3%	0.0%	0.0%
Others	4.1%	5.6%	5.8%	4.4%	4.4%

* 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.