

Tourist profile trend (2017)

SWITZERLAND: Fourth Quarter

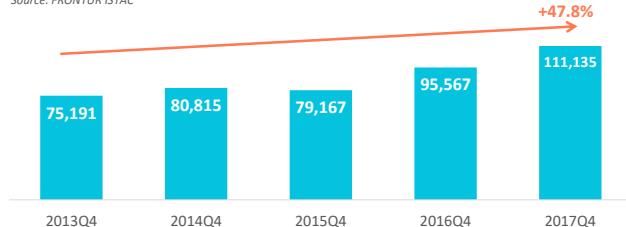


How many are they and how much do they spend?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Tourist arrivals (FRONTUR)	75,191	80,815	79,167	95,567	111,135
Tourist arrivals (<u>> 16 years old</u>)	64,371	68,719	69,430	83,223	94,718
Average daily expenditure (€)	170.23	174.69	186.22	185.41	175.76
. in their place of residence	130.82	129.44	140.21	137.36	133.57
. in the Canary Islands	39.41	45.25	46.01	48.05	42.19
Average length of stay	8.47	9.31	9.19	9.08	9.84
Turnover per tourist (€)	1,370	1,480	1,572	1,548	1,610
Total turnover (€m)	103	120	124	148	179
Share of annual tourist	31.6%	31.3%	29.3%	32.7%	33.6%
Share of annual turnover	31.3%	32.3%	30.3%	33.4%	35.7%
<u>% tourists who pay in the Canary Islands:</u>					
Accommodation:					
- Accommodation	13.7%	18.7%	16.5%	20.1%	21.6%
- Additional accommodation expenses	9.3%	11.5%	5.6%	9.8%	8.5%
Transport:					
- Public transport	15.0%	11.7%	21.7%	15.9%	20.2%
- Taxi	19.4%	22.3%	16.9%	19.2%	15.2%
- Car rental	23.5%	23.3%	25.6%	23.9%	25.5%
Food and drink:					
- Food purchases at supermarkets	51.0%	52.3%	55.4%	47.6%	49.3%
- Restaurants	58.5%	61.9%	53.6%	60.9%	62.1%
Souvenirs:					
- Souvenirs	61.4%	56.6%	56.2%	58.0%	50.9%
Leisure:					
- Organized excursions	20.4%	19.4%	20.5%	15.7%	16.9%
- Leisure, amusement	8.4%	6.7%	11.7%	8.2%	7.4%
- Trip to other islands	1.9%	2.7%	2.8%	1.4%	3.0%
- Sporting activities	11.3%	12.9%	14.1%	10.2%	9.9%
- Cultural activities	4.8%	4.8%	6.4%	4.1%	5.5%
- Discos and disco-pubs	5.9%	5.3%	4.8%	5.6%	3.8%
Others:					
- Wellness	9.7%	10.6%	11.1%	9.1%	6.8%
- Medical expenses	4.9%	5.5%	3.5%	4.2%	3.8%
- Other expenses	9.8%	9.8%	7.5%	10.5%	8.6%

TOURIST ARRIVALS

Source: FRONTUR ISTAC



What do they book at their place of residence?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight only	6.6%	13.3%	8.5%	11.3%	9.5%
Flight and accommodation (room only)	17.6%	23.2%	19.5%	19.0%	21.5%
Flight and accommodation (B&B)	12.5%	15.5%	12.8%	17.9%	16.0%
Flight and accommodation (half board)	37.2%	24.6%	30.2%	26.7%	30.3%
Flight and accommodation (full board)	2.5%	4.9%	3.9%	5.1%	5.9%
Flight and accommodation (all inclusive)	23.6%	18.5%	25.1%	20.0%	16.9%
<u>% Tourists using low-cost airlines</u>	32.9%	25.9%	41.7%	38.2%	43.9%
<u>Other expenses in their place of residence:</u>					
- Car rental	17.2%	19.7%	16.9%	25.0%	20.6%
- Sporting activities	4.9%	8.0%	13.5%	5.5%	7.5%
- Excursions	6.6%	6.9%	11.8%	9.3%	7.8%
- Trip to other islands	0.5%	1.3%	3.6%	3.5%	2.6%

How do they book?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Accommodation booking					
Tour Operator	43.8%	28.5%	40.1%	35.2%	35.2%
- Tour Operator's website	74.0%	75.1%	75.0%	81.0%	52.9%
Accommodation	11.1%	22.2%	17.8%	20.1%	17.6%
- Accommodation's website	87.7%	82.6%	91.2%	88.5%	93.7%
Travel agency (High street)	25.3%	25.4%	20.9%	16.4%	16.8%
Online Travel Agency (OTA)	16.3%	17.3%	16.7%	21.6%	24.3%
No need to book accommodation	3.5%	6.6%	4.5%	6.7%	6.1%

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Flight booking					
Tour Operator	48.4%	27.0%	36.9%	37.5%	36.3%
- Tour Operator's website	76.3%	79.1%	70.9%	74.1%	52.0%
Airline	16.8%	30.2%	26.5%	32.3%	34.2%
- Airline's website	97.9%	100.0%	98.0%	100.0%	100.0%
Travel agency (High street)	19.8%	29.1%	22.5%	17.0%	16.0%
Online Travel Agency (OTA)	15.0%	13.7%	14.1%	13.1%	13.5%

How far in advance do they book their trip?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
The same day they leave	0.0%	0.5%	0.6%	0.0%	0.0%
Between 2 and 7 days	7.8%	5.6%	6.1%	3.7%	5.5%
Between 8 and 15 days	13.2%	8.4%	4.9%	5.3%	7.8%
Between 16 and 30 days	12.5%	17.8%	13.3%	14.4%	20.7%
Between 31 and 90 days	40.6%	31.4%	33.1%	37.1%	31.7%
More than 90 days	25.9%	36.3%	42.0%	39.6%	34.3%

Who are they?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Gender					
Men	45.9%	45.4%	48.7%	51.8%	56.9%
Women	54.1%	54.6%	51.3%	48.2%	43.1%
<u>Age</u>					
Average age (tourists > 16 years old)	43.0	44.8	45.4	45.5	48.6
Standard deviation	13.4	12.5	14.6	14.5	14.8
<u>Age range (> 16 years old)</u>					
16-24 years old	8.4%	4.1%	9.4%	6.5%	6.0%
25-30 years old	12.3%	11.4%	10.7%	10.7%	7.8%
31-45 years old	39.8%	38.1%	28.1%	35.3%	28.2%
46-60 years old	29.4%	33.2%	36.4%	31.9%	35.6%
Over 60 years old	10.2%	13.2%	15.4%	15.6%	22.4%
<u>Occupation</u>					
Business owner or self-employed	12.6%	19.5%	14.5%	22.7%	18.9%
Upper/Middle management employee	59.6%	52.8%	54.3%	49.3%	43.9%
Auxiliary level employee	11.6%	17.1%	9.1%	9.0%	10.5%
Students	3.0%	1.1%	5.5%	4.8%	2.4%
Retired	7.0%	7.3%	13.3%	12.9%	23.0%
Unemployed / unpaid dom. work	6.2%	2.2%	3.3%	1.3%	1.4%
<u>Annual household income level</u>					
€12,000 - €24,000	5.0%	3.7%	4.7%	5.8%	3.9%
€24,001 - €36,000	6.7%	2.4%	3.0%	2.1%	2.6%
€36,001 - €48,000	7.0%	5.5%	5.8%	4.5%	10.0%
€48,001 - €60,000	9.7%	13.2%	13.8%	10.8%	13.2%
€60,001 - €72,000	13.1%	14.4%	11.3%	19.4%	20.1%
€72,001 - €84,000	16.0%	18.0%	12.8%	7.3%	18.4%
More than €84,000	42.5%	42.8%	48.6%	50.0%	31.8%

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Which island do they choose?

Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	5,815	6,021	8,851	9,984	14,171
- Fuerteventura	13,693	11,616	12,526	12,668	13,126
- Gran Canaria	21,815	23,823	23,833	29,383	38,081
- Tenerife	21,232	25,509	23,111	29,014	25,560
- La Palma	151	523	81	642	2,369

Share (%)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
- Lanzarote	9.3%	8.9%	12.9%	12.2%	15.2%
- Fuerteventura	21.8%	17.2%	18.3%	15.5%	14.1%
- Gran Canaria	34.8%	35.3%	34.8%	36.0%	40.8%
- Tenerife	33.9%	37.8%	33.8%	35.5%	27.4%
- La Palma	0.2%	0.8%	0.1%	0.8%	2.5%

Where do they stay?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
5* Hotel	17.3%	17.5%	12.2%	17.4%	17.5%
4* Hotel	35.5%	34.3%	40.6%	42.4%	35.8%
1-2-3* Hotel	16.8%	14.5%	14.6%	9.7%	15.5%
Apartment	25.2%	26.6%	24.4%	21.1%	26.7%
Property (privately-owned, friends, family)	3.8%	3.9%	3.9%	5.1%	3.3%
Others	1.5%	3.3%	4.3%	4.3%	1.2%

Why do they choose the Canary Islands?

Aspects influencing the choice	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Climate/sun	91.5%	96.6%	91.5%	93.5%	93.8%
Beaches	42.5%	38.5%	42.1%	37.0%	41.1%
Tranquillity/rest/relaxation	45.7%	39.0%	28.9%	37.9%	30.2%
Scenery	24.5%	26.7%	29.7%	21.2%	29.2%
Visiting new places	13.5%	15.4%	14.0%	15.2%	17.9%
Security	5.7%	6.2%	10.8%	13.5%	14.5%
Active tourism	8.0%	7.0%	5.6%	8.2%	8.7%
Ease of travel	9.0%	8.5%	8.0%	11.5%	8.6%
Nautical activities	5.1%	7.1%	6.4%	4.1%	5.9%
Price	7.1%	11.3%	9.7%	7.2%	4.9%
Suitable destination for children	8.0%	5.4%	8.2%	4.3%	4.9%
Quality of the environment	2.8%	3.7%	4.7%	4.0%	3.2%
Nightlife/fun	3.8%	3.8%	2.5%	3.6%	3.0%
Theme parks	2.1%	1.0%	3.6%	1.7%	2.1%
Health-related tourism	0.9%	0.8%	0.5%	0.8%	1.9%
Shopping	1.1%	0.4%	1.3%	3.3%	1.8%

* Multi-choice question

Who do they come with?

	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Unaccompanied	11.1%	11.4%	12.5%	9.7%	14.3%
Only with partner	51.1%	44.9%	42.4%	45.8%	43.4%
Only with children (under the age of 13)	1.5%	1.1%	1.1%	0.8%	1.8%
Partner + children (under the age of 13)	14.8%	15.1%	14.7%	9.4%	10.8%
Other relatives	6.4%	5.1%	6.4%	9.4%	5.1%
Friends	5.8%	8.2%	5.6%	8.8%	10.1%
Work colleagues	0.4%	0.0%	0.4%	1.4%	0.0%
Other combinations ⁽¹⁾	8.8%	14.1%	16.8%	14.8%	14.5%

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

How do they rate the Canary Islands?

Impression of their stay	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Good or very good (% tourists)	93.3%	91.3%	93.1%	95.8%	88.5%
Average rating (scale 1-10)	8.76	8.73	8.80	8.81	8.63

How many are loyal to the Canary Islands?

Repeat tourists	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
At least 1 previous visit	67.6%	72.9%	73.5%	74.9%	68.8%
At least 10 previous visits	12.4%	12.0%	9.9%	13.3%	17.8%

Where does the flight come from?

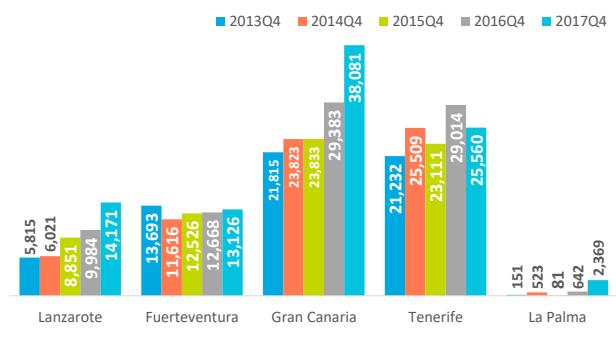
Tourists (> 16 years old)	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Switzerland	70.4%	78.7%	73.8%	72.6%	76.3%
Spanish Mainland	22.3%	14.5%	15.4%	22.5%	16.4%
Italy	1.4%	5.1%	4.9%	2.8%	3.7%
Germany	6.0%	1.6%	4.7%	1.3%	2.2%
Belgium	0.0%	0.0%	0.0%	0.0%	0.3%
France	0.0%	0.0%	0.3%	0.0%	0.0%
United Kingdom	0.0%	0.0%	0.9%	0.4%	0.0%
Others	0.0%	0.0%	0.0%	0.4%	1.1%

What did motivate them to come?

Prescription sources	2013Q4	2014Q4	2015Q4	2016Q4	2017Q4
Previous visits to the Canary Islands	53.4%	58.7%	64.4%	62.9%	56.6%
Recommendation by friends/relatives	29.7%	34.2%	31.0%	34.8%	28.3%
The Canary Islands television channel	0.4%	0.9%	0.0%	0.6%	0.6%
Other television or radio channels	0.0%	1.4%	0.3%	0.7%	2.8%
Information in press/magazines/books	3.1%	5.4%	2.5%	5.4%	5.0%
Attendance at a tourism fair	0.3%	0.5%	0.0%	0.8%	0.2%
Tour Operator's brochure or catalogue	10.3%	7.1%	10.0%	8.2%	10.8%
Recommendation by Travel Agency	14.1%	13.4%	13.6%	10.8%	10.8%
Information obtained via the Internet	33.7%	31.4%	28.0%	29.7%	31.8%
Senior Tourism programme	0.4%	0.0%	0.5%	0.0%	0.0%
Others	13.7%	8.9%	8.9%	5.3%	7.2%

* Multi-choice question

Tourist arrivals by islands



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.