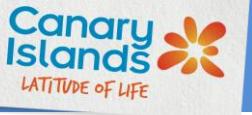


Tourist profile trend (2017)

Switzerland: Third Quarter



How many are they and how much do they spend?



How do they book?

| | 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 lenght 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 (€) (*) | | | | | |
| 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% |

(*) 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.

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% |

| | 2013Q3 | 2014Q3 | 2015Q3 | 2016Q3 | 2017Q3 |
|------------------------------------|--------|--------|--------|--------|--------|
| Flight booking | | | | | |
| 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% |

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% |

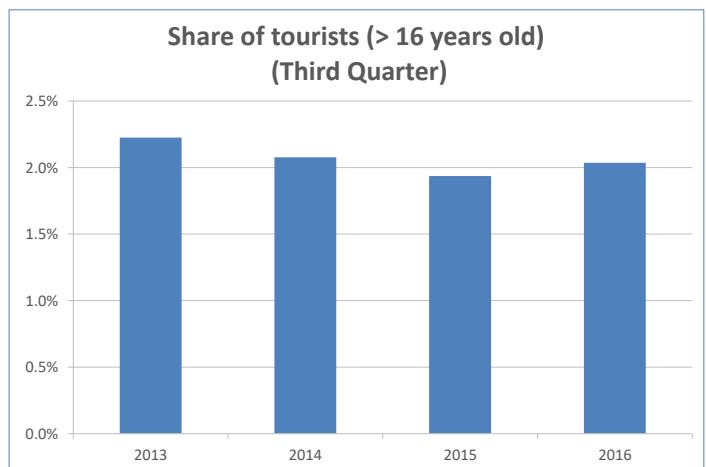
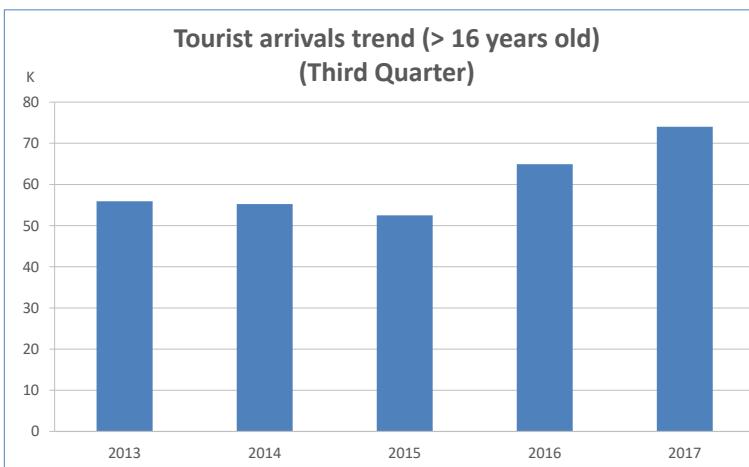
* Multi-choice question

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.